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## Annual Report for Calendar 2024

The Honorable Lindsey Graham (Graham, Lindsey)

Filed 05/13/2025 @ 12:12 PM

Print Report

The following statements were checked before filing:

I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.

I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.

I *omitted* assets because they meet the three-part test for exemption.

### Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **No**

### Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **No**

### Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

	Asset	Asset Type	Owner	Value	Income Type	Income
1	<b>VIG-Vanguard Dividend Apprec Idx ETF</b>	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Dividends,	None (or less than \$201)
2	<b>VIG - Vanguard Dividend Appreciation Index Fund ETF IRA</b>	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Dividends,	None (or less than \$201)

3	<b>DODGX-Dodge &amp; Cox Stock (NASDAQ) IRA Asset</b>	Mutual Funds Asset Type	Self Owner	\$1,001 - \$15,000	Dividends, Capital Gains, Type	None (or less than \$201)
4	<b>DODGX - Dodge &amp; Cox Stock (NASDAQ)</b>	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Dividends, Capital Gains,	\$201 - \$1,000
5	<b>HOVLX-Homestead Value (NASDAQ) IRA</b>	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
6	<b>HOVLX - Homestead Value (NASDAQ)</b>	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
7	<b>TRBCX-T. Rowe Price Blue Chip Growth (NASDAQ)</b>	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Dividends,	\$201 - \$1,000
8	<b>VWUSX - Vanguard U.S. Growth Fund Investor Shares</b>	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Dividends, Capital Gains,	\$201 - \$1,000
9	<b>yacktman fund (YACKX)</b>	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
10	<b>MERDX - Meridian Growth Legacy (NASDAQ)</b>	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Dividends, Capital Gains,	\$201 - \$1,000
11	<b>US Senate Federal Credit Union (savings) (Washington,, DC)</b> <i>Type: Savings,</i>	Bank Deposit	Self	None (or less than \$1,001)	None,	None (or less than \$201)
12	<b>US Senate Federal Credit Union (checking) (Washington, DC)</b> <i>Type: Checking,</i>	Bank Deposit	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
13	<b>First Citizens (savings) (Columbia, SC)</b> <i>Type: Savings,</i>	Bank Deposit	Self	\$15,001 - \$50,000	Interest,	None (or less than \$201)
14	<b>First Citizens (checking) (Columbia, SC)</b> <i>Type: Checking,</i>	Bank Deposit	Self	\$15,001 - \$50,000	Interest,	None (or less than \$201)
15	<b>TD Ameritrade Cash Account (Omaha, NE)</b> <i>Type: Money Market Account,</i>	Bank Deposit	Self	\$100,001 - \$250,000	Interest,	None (or less than \$201)
16	<b>TD Ameritrade Insured Dep. Acct. (IRA) (Omaha, NE)</b> <i>Type: IRA Cash Accounts,</i>	Bank Deposit	Self	\$50,001 - \$100,000	Interest,	None (or less than \$201)
17	<b>FLOT - iShares Floating Rate Bond ETF</b>	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000

18	<a href="#"><b>AFLO</b></a> - iShares Treasury Floating Rate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Dividends, Type	\$201me \$1,000
19	<b>IBDQ</b> - Dec 2025 Term Corp Ishares Ibonds ETF IRA	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
20	<a href="#"><b>PRF</b></a> - Invesco FTSE RAFI US 1000 ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
21	<a href="#"><b>BSCP</b></a> - Invesco BulletShares 2025 Corporate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
22	<a href="#"><b>SYLD</b></a> - Cambria Shareholder Yield ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
23	<a href="#"><b>USFR</b></a> - Wisdomtree Floating Rate Treasury Fund	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends,	\$1,001 - \$2,500
24	<a href="#"><b>BSCR</b></a> - Invesco BulletShares 2027 Corporate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
25	<b>USFR</b> - Wisdomtree Floating Rate Treasury Fund (IRA)	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends,	\$1,001 - \$2,500
26	<a href="#"><b>XHLF</b></a> - BondBloxx ETF Trust BondBloxx Bloomberg Six Month	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Dividends,	\$201 - \$1,000
27	<a href="#"><b>BSCT</b></a> - Invesco BulletShares 2029 Corporate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
28	<b>XONE</b> - BondBloxx ETF Trust BondBloxx Bloomberg One Year T (IRA)	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
29	<b>BSCU</b> - Invesco BulletShares 2030 Corporate Bond ETF (IRA)	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
30	<a href="#"><b>BSCS</b></a> - Invesco BulletShares 2028 Corporate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
31	<b>US Treasury Note</b> Rate/Coupon: None Matures: None	Government Securities US Treasury/Agency Security	Self	\$50,001 - \$100,000	None,	None (or less than \$201)

32	Asset Type	Owner	Value	Income Type	Income for less
	Rate/Coupon: None		\$50,001 -		
	Matures: None		\$100,000		than \$201)

## Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

## Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **Yes**

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
1	Self	--	US Treasury Note	Purchase	12/31/2024	\$50,001 - \$100,000	n/a
2	Self	--	US Treasury Note	Purchase	12/31/2024	\$50,001 - \$100,000	n/a
3	Self	--	US Treasury Note	Sale (Full)	07/15/2024	\$50,001 - \$100,000	n/a
4	Self	--	US Treasury Note (IRA)	Sale (Full)	11/15/2024	\$15,001 - \$50,000	n/a
5	Self	<a href="#">BSCS</a>	Invesco BulletShares 2028 Corporate Bond ETF	Purchase	12/31/2024	\$15,001 - \$50,000	n/a
6	Self	<a href="#">XHLF</a>	BondBloxx ETF Trust BondBloxx Bloomberg Six Month	Purchase	09/11/2025	\$50,001 - \$100,000	n/a
7	Self	<a href="#">BSCT</a>	Invesco BulletShares 2029 Corporate Bond ETF	Purchase	09/11/2024	\$15,001 - \$50,000	n/a

#	Self Owner	-- Ticker	XONE - BondBloxx	Purchase Type	T2012/2024 Date	\$15,001 Amount	n/a Comments
			ETF Trust BondBloxx Bloomberg One Year T (IRA)			\$50,000	
9	Self	--	BSCU - Invesco BulletShares 2030 Corporate Bond ETF (IRA)	Purchase	12/31/2024	\$15,001 - \$50,000	n/a
10	Self	<a href="#">PRF</a>	Invesco FTSE RAFI US 1000 ETF	Purchase	09/11/2024	\$15,001 - \$50,000	n/a

## Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **No**

## Part 6. Travel

Did you, your spouse, or dependent child receive any reportable travel? **No**

## Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2012	Self	Mortgage	0	3.625% (30 years)	\$100,001 - \$250,000	Mr. Cooper Mortgage Washington, DC	n/a

## Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **No**

## Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **No**

## Part 10. Compensation

*Only required if you are a candidate or this is your first report* Did any person or entity pay more than \$5,000 to you or for services provided by you? **This is not my first report.**

## Attachments & Comments

*No attachments added.*

*No comments added.*