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Annual Report for Calendar 2024

The Honorable Lindsey Graham (Graham, Lindsey)

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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	VIG-Vanguard Dividend Apprec Idx ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Dividends,	None (or less than \$201)
2	VIG - Vanguard Dividend Appreciation Index Fund ETF IRA	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
3	FAIRVIEW INVESTMENT MANAGEMENT	Mutual Funds	Self	\$1,000 -	Dividends,	None (or less

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

18	FLO - iShares Treasury Floating Rate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
19	IBDQ - 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	PRF - Invesco FTSE RAFI US 1000 ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
21	BSCP - Invesco BulletShares 2025 Corporate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
22	SYLD - Cambria Shareholder Yield ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
23	USFR - Wisdomtree Floating Rate Treasury Fund	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends,	\$1,001 - \$2,500
24	BSCR - Invesco BulletShares 2027 Corporate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
25	USFR - Wisdomtree Floating Rate Treasury Fund (IRA)	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends,	\$1,001 - \$2,500
26	XHLF - BondBloxx ETF Trust BondBloxx Bloomberg Six Month	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Dividends,	\$201 - \$1,000
27	BSCT - Invesco BulletShares 2029 Corporate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
28	XONE - 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	BSCU - 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	BSCS - Invesco BulletShares 2028 Corporate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
31	US Treasury Note Rate/Coupon: None Matures: None	Government Securities US Treasury/Agency Security	Self	\$50,001 - \$100,000	None,	None (or less than \$201)

32	Asset US Treasury Note	Asset Type Government	Owner Self	Value \$50,001 - \$100,000	Income Type None	Income None (or less than \$201)
	Rate/Coupon: None	Securities				
	Matures: None	US Treasury/Agency Security				

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	BSCS	Invesco BulletShares 2028 Corporate Bond ETF	Purchase	12/31/2024	\$15,001 - \$50,000	n/a
6	Self	XHLE	BondBloxx ETF Trust BondBloxx Bloomberg Six Month	Purchase	09/11/2025	\$50,001 - \$100,000	n/a
7	Self	BSCT	Invesco BulletShares 2029 Corporate Bond ETF	Purchase	09/11/2024	\$15,001 - \$50,000	n/a

8	Self	--	XONE - BondBloxx ETF Trust BondBloxx Bloomberg One Year T (IRA)	Purchase	12/31/2024	\$15,001 -\$50,000	n/a
#	Owner	Ticker	Asset Name	Type	Date	Amount	Comments
9	Self	--	BSCU - Invesco BulletShares 2030 Corporate Bond ETF (IRA)	Purchase	12/31/2024	\$15,001 -\$50,000	n/a
10	Self	PRF	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.