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Annual Report for Calendar 2024

The Honorable Maggie Hassan (Hassan, Maggie)

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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? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Spouse	Salary	School Year Abroad, Inc. North Andover, MA	> \$1,000	n/a

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	BankProv (Amesbury, MA) Type: Checking	Bank Deposit	Joint	\$50,001 - \$100,000	None,	None (or less than

	Type: Checking, Asset	Asset Type	Owner	Value	Income Type	Income From
2	Northwestern Mutual Adjustable Comp Life <i>Provider: Northwestern Mutual</i>	Life Insurance Whole	Self	\$100,001 - \$250,000	Dividends,	\$2,501 - \$5,000
3	Northwestern Mutual Whole Life <i>Provider: Northwestern Mutual</i>	Life Insurance Whole	Self	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
4	Northwestern Mutual Whole Life Policy <i>Provider: Northwestern Mutual</i>	Life Insurance Whole	Spouse	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
5	Northwestern Mutual Adjustable Comp Life <i>Provider: Northwestern Mutual</i>	Life Insurance Whole	Spouse	\$100,001 - \$250,000	Dividends,	\$2,501 - \$5,000
6	Northwestern Mutual Adjustable Comp Life <i>Provider: Northwestern Mutual</i>	Life Insurance Whole	Spouse	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
7	Citizens Bank (Medford, MA) <i>Type: Certificate of Deposit,</i>	Bank Deposit	Joint	None (or less than \$1,001)	None,	None (or less than \$201)
8	Citizens Bank IRA CD	Retirement Plans IRA	Self			
8.1	Citizens Bank (Medford, MA) <i>Type: Certificate of Deposit,</i>	Bank Deposit	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
9	Onadune, LLC <i>Company: Onadune, LLC (Boston, MA) Description: Shared ownership of rental property in RI</i>	Business Entity Limited Liability Company (LLC)	Self			
9.1	Onadune <i>Description: Vacation/Rental Property (Little Compton, RI)</i>	Real Estate Residential	Self	\$100,001 - \$250,000	Rent/Royalties,	\$1,001 - \$2,500
10	Onadune, LLC <i>Company: Onadune, LLC (Boston, MA) Description: Shared ownership of rental property in RI</i>	Business Entity Limited Liability Company (LLC)	Spouse			
10.1	Onadune <i>Description: Vacation/Rental Property (Little Compton, RI)</i>	Real Estate Residential	Spouse	\$15,001 - \$50,000	Rent/Royalties,	\$201 - \$1,000
11	Fidelity - Rollover IRA <i>Filer comment: Account transferred from Charles Schwab</i>	Retirement Plans IRA	Spouse			

11.1	Asset PSP - Invesco Global Listed Private Equity ETF	Asset Type Mutual Funds Exchange Traded Fund/Note	Owner Spouse	Value \$1,001 - \$15,000	Income Type Excepted Investment Fund,	Income None (or less than \$201)
11.2	IXC - iShares Global Energy ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.3	TIP - iShares TIPS Bond ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
11.4	JNK - SPDR Bloomberg Barclays High Yield Bond ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.5	YYY - Amplify High Income ETF <i>Filer comment: Formerly reported as YYY - YieldShares High Income ETF</i>	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.6	DBC - Invesco DB Commodity Index Tracking Fund	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.7	AWF - AllianceBernstein Global High Income Fund	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.8	EEM - iShares MSCI Emerging Markets ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
11.9	HYS - PIMCO 0-5 Year High Yield Corporate Bond Index Exc	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
11.10	VIS - Vanguard Industrials Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.11	VTV - Vanguard Value ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)

11.12	VTI - Vanguard Total Stock Market Index Asset Fund ETF Shares	Mutual Funds Asset Type Exchange Traded Fund/Note	Spouse Owner	\$50,001 - Value \$100,000	Excepted Income Type Investment Fund,	None (or less than \$201)
11.13	DES - WisdomTree U.S. SmallCap Dividend Fund	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
11.14	QQQ - Invesco QQQ Trust	Mutual Funds Exchange Traded Fund/Note	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
11.15	LQD - iShares iBoxx \$ Investment Grade Corporate Bond ET	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.16	SHY - iShares 1-3 Year Treasury Bond ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.17	SCZ - iShares MSCI EAFE Small-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.18	IWC - iShares Micro-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.19	BND - Vanguard Total Bond Market Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
11.20	VEA - Vanguard FTSE Developed Markets Index Fund ETF Sha	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.21	VNQI - Vanguard Global ex-U.S. Real Estate Index Fund ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.22	VWO - Vanguard FTSE Emerging Markets Index Fund ETF Shar	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.23	VOE - Vanguard Mid-Cap Value Index Fund	Mutual Funds	Spouse	\$50,001 -	Excepted	None

EIF Shares Asset	Exchange Traded Fund/Note	Owner	\$100,000 Value	Investment Fund, Type	(or less than \$201)	
11.24	VOT - Vanguard Mid-Cap Growth Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.25	VBK - Vanguard Small-Cap Growth Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.26	VBR - Vanguard Small-Cap Value Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.27	VUG - Vanguard Growth Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Spouse	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
11.28	VV - Vanguard Large-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.29	IYY - iShares Dow Jones U.S. ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.30	FDRXX - Fidelity Government Cash Reserves	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.31	ITA - iShares U.S. Aerospace & Defense ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12	Fidelity - Rollover IRA <i>Filer comment: Account transferred from Charles Schwab</i>	Retirement Plans IRA	Self			
12.1	PSP - Invesco Global Listed Private Equity ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
12.2	TIP - iShares TIPS Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
12.3	JNK - SPDR Bloomberg Barclays High Yield Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12.4	DBC - Invesco DB Commodity Index Tracking Fund	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
12.5	AWF - AllianceBernstein Global High Income Fund	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
12.6	LQD - iShares iBoxx \$ Investment Grade Corporate Bond ET	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12.7	SHY - iShares 1-3 Year Treasury Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12.8	SCZ - iShares MSCI EAFE Small-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12.9	IWC - iShares Micro-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12.10	BND - Vanguard Total Bond Market Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
12.11	VEA - Vanguard FTSE Developed Markets Index Fund ETF Sha	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12.12	VNQI - Vanguard Global ex-U.S. Real Estate Index Fund ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12.13	VWO - Vanguard FTSE Emerging Markets Index Fund ETF Shar	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)

12.14	VOE - Vanguard Mid-Cap Value Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12.15	VOT - Vanguard Mid-Cap Growth Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
12.16	VBK - Vanguard Small-Cap Growth Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
12.17	VBR - Vanguard Small-Cap Value Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
12.18	VUG - Vanguard Growth Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
12.19	VTV - Vanguard Value ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
12.20	VTI - Vanguard Total Stock Market Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12.21	IYY - iShares Dow Jones U.S. ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12.22	FDRXX - Fidelity Government Cash Reserves	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
13	Fidelity Partners Healthcare System, Inc. Retirement Plan	Retirement Plans Defined Contribution Pension Plan	Self			
13.1	VTVX - Vanguard Target Retirement 2025 Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
14	Fidelity - Brokerage <i>Filer comment: Account transferred from Charles</i>	Brokerage/Managed Account	Joint			

Schwab Asset	Asset Type	Owner	Value	Income Type	Income
14.1 Charles Schwab (Westlake, TX) <i>Type: Brokerage Sweep Account,</i>	Bank Deposit	Joint	None (or less than \$1,001)	Interest,	\$201 - \$1,000
14.2 AWF - AllianceBernstein Global High Income Fund	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$5,001 - \$15,000
14.3 YYY - Amplify High Income ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$2,501 - \$5,000
14.4 DBC - Invesco DB Commodity Index Tracking Fund	Mutual Funds Exchange Traded Fund/Note	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
14.5 DVY - iShares Select Dividend ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$201 - \$1,000
14.6 TIP - iShares TIPS Bond ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Excepted Investment Fund,	\$2,501 - \$5,000
14.7 JNK - SPDR Bloomberg Barclays High Yield Bond ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$2,501 - \$5,000
14.8 BND - Vanguard Total Bond Market Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$1,001 - \$2,500
14.9 HYS - PIMCO 0-5 Year High Yield Corporate Bond Index Exc	Mutual Funds Exchange Traded Fund/Note	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	\$201 - \$1,000
14.10 VTI - Vanguard Total Stock Market Index Fund ETF Shares	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$201 - \$1,000
14.11 QQQ - Invesco QQQ Trust, Series 1	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$201 - \$1,000
14.12 VTV - Vanguard Value ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$201 - \$1,000
14.13 IYY - iShares Dow Jones U.S. ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)

14.14	VUGT - Vanguard Growth ETF	Mutual Funds Exchange Traded Fund/Note	Owner	\$50,001 - \$100,000	Excepted Investment Fund,	None - \$201
14.15	FZFX - Fidelity Treasury Money Market Fund	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
14.16	FDRXX - Fidelity Government Cash Reserves	Mutual Funds Mutual Fund	Joint	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
14.17	US Treasury Note <i>Rate/Coupon: None</i> <i>Matures: None</i>	Government Securities US Treasury/Agency Security	Joint	None (or less than \$1,001)	Interest, Capital Gains,	\$5,001 - \$15,000
14.18	VV - Vanguard Large-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500
14.19	VBK - Vanguard Small-Cap Growth ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$201 - \$1,000
14.20	ITA - iShares U.S. Aerospace & Defense ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
15	TIAA-CREF Retirement Plan - Phillips Exeter Academy	Retirement Plans Defined Contribution Pension Plan	Spouse			
15.1	TIAA Traditional <i>Provider: TIAA-CREF</i>	Annuity Fixed	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
16	TIAA-CREF Retirement Plan - Wesleyan University	Retirement Plans Deferred Compensation	Spouse			
16.1	TIAA Traditional <i>Provider: TIAA-CREF</i>	Annuity Fixed	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
17	TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan	Retirement Plans Defined Contribution Pension Plan	Spouse			
17.1	COLMRY - College Retirement Equities	Mutual Funds	Spouse	\$250,001	Excepted	None

17.1	QCMMRX - College Retirement Equities Fund - CREF Money Mark	Mutual Funds Mutual Fund	Spouse Owner	\$250,001 Value \$500,000	Excepted Investment Fund,	None (or less than \$201)
18	TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan	Retirement Plans Deferred Compensation	Spouse			
18.1	QCMMRX - College Retirement Equities Fund - CREF Money Mark	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
19	BankProv (Amesbury, MA) Type: Checking,	Bank Deposit	Spouse	\$15,001 - \$50,000	None,	None (or less 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	Spouse	VTV	Vanguard Value ETF	Purchase	07/01/2024	\$1,001 - \$15,000	n/a
2	Spouse	VNQI	Vanguard Global ex-U.S. Real Estate ETF	Purchase	12/24/2024	\$1,001 - \$15,000	n/a
3	Spouse	VWO	Vanguard FTSE Emerging Markets ETF	Purchase	12/24/2024	\$1,001 - \$15,000	n/a
4	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	10/08/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
5	Spouse	--	QCMMRX - College Retirement Equities Fund -	Purchase	10/22/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
6	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	11/05/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
7	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	10/08/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
8	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	10/22/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
9	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	11/05/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
10	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	07/02/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
11	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	07/16/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
12	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	07/30/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
13	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money	Purchase	08/13/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
14	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	08/27/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
15	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	09/10/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
16	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	09/24/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
17	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	07/02/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
18	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	07/16/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
19	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	07/30/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
20	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	08/13/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
21	Spouse	--	QCMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	08/27/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
22	Spouse		QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	09/10/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
23	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	09/24/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
24	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	04/09/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
25	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	04/23/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
26	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	04/26/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
27	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	05/21/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
28	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	06/04/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
29	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	06/18/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan

30 #	Spouse Owner	-- Ticker	QCMMRX - Asset Name College	Transaction Purchase Type	Transaction 04/09/2024 Date	\$1,001 - Amount \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
			Retirement Equities Fund - CREF Money Market R1				
31	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	04/23/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
32	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	04/26/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
33	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	05/21/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
34	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	06/04/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
35	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	06/18/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
36	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	01/03/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
37	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	01/19/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan

38 #	Spouse Owner	-- Ticker	QCMMRX - College Retirement Asset Name	Purchase Transaction Type	01/30/2024 Transaction Date	\$1,001 - \$15,000 Amount	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan Comments
Equities Fund - CREF Money Market R1							
39	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	02/13/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
40	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	02/27/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
41	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	03/12/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
42	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	03/26/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) DC Plan
43	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	01/03/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
44	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	01/19/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
45	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	01/30/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
46	Spouse	--	QCMMRX -	Purchase	02/13/2024	\$1,001 -	Underlying asset of TIAA-CREF Retirement

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Price Amount	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan Comments
	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	02/19/2024	\$1,001 - \$15,000	
47	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	02/27/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
48	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	03/12/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
49	Spouse	--	QCMMRX - College Retirement Equities Fund - CREF Money Market R1	Purchase	03/26/2024	\$1,001 - \$15,000	Underlying asset of TIAA-CREF Retirement Plan - School Year Abroad 403(b) TDA Plan
50	Spouse	QQQ	Invesco QQQ Trust, Series 1	Purchase	03/12/2024	\$15,001 - \$50,000	n/a
51	Spouse	ITA	iShares U.S. Aerospace & Defense ETF	Purchase	03/12/2024	\$1,001 - \$15,000	n/a
52	Spouse	BND	Vanguard Total Bond Market ETF	Purchase	03/12/2024	\$15,001 - \$50,000	n/a
53	Spouse	AWF	Alliancebernstein Global High Income Fund	Purchase	03/12/2024	\$1,001 - \$15,000	n/a
54	Joint	AWF	Alliancebernstein Global High Income Fund	Purchase	01/02/2024	\$15,001 - \$50,000	n/a
55	Joint	TIP	iShares TIPS Bond ETF	Purchase	01/02/2024	\$50,001 - \$100,000	n/a
56	Joint	JNK	SPDR Bloomberg Barclays High Yield Bond ETF	Purchase	01/02/2024	\$15,001 - \$50,000	n/a

57	Joint	VV	Vanguard Large-Cap ETF	Purchase	01/02/2024	\$50,001	n/a
#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
						\$100,000	
58	Joint	VBK	Vanguard Small-Cap Growth ETF	Purchase	01/02/2024	\$50,001 - \$100,000	n/a
59	Joint	BND	Vanguard Total Bond Market ETF	Purchase	01/02/2024	\$15,001 - \$50,000	n/a
60	Joint	YYY	Amplify High Income ETF	Purchase	01/29/2024	\$15,001 - \$50,000	n/a
61	Joint	QQQ	Invesco QQQ Trust, Series 1	Purchase	01/29/2024	\$1,001 - \$15,000	n/a
62	Joint	IYY	iShares Dow Jones U.S. ETF	Purchase	01/29/2024	\$1,001 - \$15,000	n/a
63	Joint	TIP	iShares TIPS Bond ETF	Sale (Partial)	04/16/2024	\$1,001 - \$15,000	n/a
64	Joint	ITA	iShares U.S. Aerospace & Defense ETF	Purchase	04/22/2024	\$1,001 - \$15,000	n/a
65	Joint	JNK	SPDR Bloomberg Barclays High Yield Bond ETF	Purchase	04/22/2024	\$1,001 - \$15,000	n/a
66	Joint	VBK	Vanguard Small-Cap Growth ETF	Purchase	04/22/2024	\$1,001 - \$15,000	n/a
67	Spouse	VTV	Vanguard Value ETF	Purchase	09/30/2024	\$1,001 - \$15,000	n/a
68	Spouse	VTV	Vanguard Value ETF	Purchase	12/26/2024	\$1,001 - \$15,000	n/a
69	Spouse	DBC	Invesco DB Commodity Index Tracking Fund	Purchase	12/27/2024	\$1,001 - \$15,000	n/a
70	Self	DBC	Invesco DB Commodity Index Tracking Fund	Purchase	12/27/2024	\$1,001 - \$15,000	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	2015	Joint	Mortgage	0	2.99% (15 years)	\$100,001 - \$250,000	NewRez LLC dba Shellpoint Mortgage Servicing Greenville, SC	n/a
2	2020	Joint	Mortgage	0	3.375% (30 years)	\$250,001 - \$500,000	RoundPoint Mortgage Servicing LLC Fort Mill, SC	n/a

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **Yes**

#	Position Dates	Position Held	Entity	Entity Type	Comments
1	Dec 1995 to present	Other (Member)	Onadune, LLC Boston, MA	Other (Limited Liability Company)	n/a

Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**

#	Date	Parties Involved	Type	Status and Terms	Comments
1	Sep 1996	Partners Healthcare Boston, MA	Continuing participation in an employee benefit plan	Management of Fidelity account, no contributions made any longer by Partners	n/a

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.

