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Annual Report for Calendar 2024

Mrs. Marsha Blackburn (Blackburn, Marsha)

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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	Self	Pension	Tennessee Consolidated Retirement System Nashville, TN	\$5,451.00	n/a
2	Spouse	Salary	Strategic Sales Tactics Inc Brentwood, TN	> \$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	Payflex Systems USA INC (Omaha, NE) <i>Type: Savings,</i>	Bank Deposit	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
2	Strategic Sales Tactics Inc. <i>Company: Strategic Sales Tactics Inc</i> (Brentwood, TN) <i>Description: Marketing Consulting</i>	Corporate Securities Non-Public Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
3	Principal Investment Plus Variable Annuity <i>Provider: Principal Financial Group</i>	Annuity Variable Annuity	Spouse			
3.1	Principal Diversified Income Division	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	None,	None (or less than \$201)
4	Principal Investment Plus Variable Annuity <i>Provider: Principal Financial Group</i>	Annuity Variable Annuity	Self			
4.1	Principal Diversified Growth Division	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	None,	None (or less than \$201)
5	American Funds Brokerage Account	Brokerage/Managed Account	Self			
5.1	ABALX - American Funds American Balanced Fund Class A	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	\$1,001 - \$2,500
5.2	AIVSX - American Funds Investment Company of America Class <i>Filer comment: Capital gains and dividend reinvestment increased value above \$15,000</i>	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	\$1,001 - \$2,500
5.3	ANWPX - American Funds New Perspective Fund Class A	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Dividends, Capital Gains,	\$5,001 - \$15,000
6	MetLife IRA	Brokerage/Managed Account	Spouse			
6.1	AB Global Dynamic Allocation Portfolio	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
6.2	Invesco Balanced Risk Allocation Portfolio	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
6.3	Blackrock Global Tactical Strategies Portfolio	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
6.4	JP Morgan Global Active Allocation Portfolio	Mutual Funds Mutual Fund	Owner Spouse	\$1,001 - \$15,000	None,	\$201) None (or less than \$201)
6.5	BHLife Balanced Plus Portfolio	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
6.6	Schroeders Global Multi-Asset Portfolio	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
7	State of Tennessee Pension	Retirement Plans Defined Benefit Pension Plan	Self	Unascertainable	Other, (Annual Pension Payment)	Other \$5,138.46
8	Pinnacle Bank (Nashville, TN) <i>Type: Checking,</i>	Bank Deposit	Self	\$100,001 - \$250,000	None,	None (or less than \$201)
9	First Horizon (Memphis, TN) <i>Type: Checking,</i>	Bank Deposit	Spouse	\$1,001 - \$15,000	Interest,	None (or less than \$201)
10	529 Account - grandchild 1 <i>Institution: Capital Group College America</i>	Education Savings Plans 529 College Savings Plan	Self			
10.1	CLBAX - American Balanced Fund Class 529-A Shares	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
10.2	CICAX - The Investment Company of America Class 529-A S	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
11	529 Account - grandchild 3 <i>Institution: Capital Group College America</i>	Education Savings Plans 529 College Savings Plan	Self			
11.1	CCFAX - American Funds College Fund 2036 Class 529-A	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
12	M Financial Group (Portland, OR) <i>Type: Money Market Account,</i>	Bank Deposit	Self	\$100,001 - \$250,000	Interest,	\$5,001 - \$15,000
13	Jackson National Life Insurance Perspective II Variable and Fixed Annuity	Life Insurance Variable	Self			

13.1	JNL/American Funds Growth A Asset	Mutual Funds Mutual Fund	Self Owner	\$15,001 - \$50,000	None, None Type	None (or less than \$201)
13.2	JNL/Mellon Nasdaq 100 Index A	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
13.3	JNL/Newton Equity Income A	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
13.4	JNL/Mellon Dow Index A	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
13.5	JNL/JPMorgan MidCap Growth A	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
13.6	JNL/T. Rowe Price Established Growth A	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
13.7	JNL/Mellon Information Technology Sector A	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
13.8	JNL/Mellon Healthcare Sector A	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
13.9	JNL/T.Rowe Price Capital Appreciation A	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
14	529 Account - grandchild 2 <i>Institution: Capital Group College America</i>	Education Savings Plans 529 College Savings Plan	Self			
14.1	CLBAX - American Balanced Fund Class 529-A Shares	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
14.2	CICAX - The Investment Company of America Class 529-A S	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
15	529 Account - grandchild 4 <i>Institution: Capital Group College America</i>	Education Savings Plans 529 College Savings Plan	Self			
15.1	CDJAX - American Funds College 2039 529-A Shares	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)

Fund Class 529-A

Mutual Fund

\$15,000

less than

Filer comment: multiple purchases below

Income

(\$201)

\$1,000

Asset Type

Owner

Value

Type

Income

Part 4a. Periodic Transaction Report Summary

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

Part 4b. TransactionsDid 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	--	JNL/Mellon Healthcare Sector A	Purchase	01/28/2024	\$1,001 - \$15,000	n/a
2	Self	--	JNL/JPMorgan MidCap Growth A	Purchase	01/28/2024	\$1,001 - \$15,000	n/a
3	Self	--	JNL/T.Rowe Price Capital Appreciation A	Purchase	01/28/2024	\$1,001 - \$15,000	n/a
4	Self	--	JNL/Mellon Dow Index A	Purchase	01/28/2024	\$1,001 - \$15,000	n/a
5	Self	--	JNL/T. Rowe Price Established Growth A	Purchase	01/28/2024	\$1,001 - \$15,000	n/a
6	Self	--	JNL/Mellon Information Technology Sector A	Purchase	01/28/2024	\$1,001 - \$15,000	n/a
7	Self	--	JNL/Newton Equity Income A	Purchase	01/28/2024	\$1,001 - \$15,000	n/a
8	Self	--	JNL/Mellon Nasdaq 100 Index A	Purchase	01/28/2024	\$1,001 - \$15,000	n/a
9	Self	--	JNL/American Funds Growth A	Purchase	01/28/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
			JNL/Mellon	Purchase	02/28/2024	\$15,000 \$1,001	n/a
			Healthcare Sector A			- \$15,000	
11	Self	--	JNL/T.Rowe Price Capital Appreciation A	Purchase	02/28/2024	\$1,001 - \$15,000	n/a
12	Self	--	JNL/Mellon Dow Index A	Purchase	02/28/2024	\$1,001 - \$15,000	n/a
13	Self	--	JNL/JPMorgan MidCap Growth A	Purchase	02/28/2024	\$1,001 - \$15,000	n/a
14	Self	--	JNL/Mellon Information Technology Sector A	Purchase	02/28/2024	\$1,001 - \$15,000	n/a
15	Self	--	JNL/Newton Equity Income A	Purchase	02/28/2024	\$1,001 - \$15,000	n/a
16	Self	--	JNL/Mellon Nasdaq 100 Index A	Purchase	02/28/2024	\$1,001 - \$15,000	n/a
17	Self	--	JNL/T. Rowe Price Established Growth A	Purchase	02/28/2024	\$1,001 - \$15,000	n/a
18	Self	--	JNL/American Funds Growth A	Purchase	02/28/2024	\$1,001 - \$15,000	n/a
19	Self	--	JNL/T. Rowe Price Established Growth A	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
20	Self	--	JNL/JPMorgan MidCap Growth A	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
21	Self	--	JNL/Mellon Healthcare Sector A	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
22	Self	--	JNL/T.Rowe Price Capital Appreciation A	Purchase	03/28/2024	\$1,001 - \$15,000	n/a

23 #	Self Owner	-- Ticker	JNL/Mellon Asset Name Information	Transaction Purchase Type	Transaction 03/28/2024 Date	\$1,001 Amount - \$15,000	n/a Comments
			Technology Sector A			\$15,000	
24	Self	--	JNL/Mellon Dow Index A	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
25	Self	--	JNL/Mellon Nasdaq 100 Index A	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
26	Self	--	JNL/Newton Equity Income A	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
27	Self	--	JNL/American Funds Growth A	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
28	Self	--	JNL/Mellon Information Technology Sector A	Sale (Partial)	10/30/2024	\$1,001 - \$15,000	n/a
29	Self	--	JNL/Mellon Nasdaq 100 Index A	Sale (Partial)	10/30/2024	\$1,001 - \$15,000	n/a
30	Self	--	JNL/Mellon Dow Index A	Purchase	10/30/2024	\$1,001 - \$15,000	n/a
31	Self	--	JNL/Mellon Healthcare Sector A	Purchase	10/30/2024	\$1,001 - \$15,000	n/a
32	Self	ABALX	American Balanced Fund Class A Shs	Purchase	12/16/2024	\$1,001 - \$15,000	n/a
33	Self	AIVSX	American Funds Investment CO of America A	Purchase	12/17/2024	\$1,001 - \$15,000	n/a
34	Self	ANWPX	New Perspective Fund Class A Shares	Purchase	12/19/2024	\$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	2020	Spouse	Mortgage	None	2.5% (30 year fixed)	\$250,001 - \$500,000	JPMorgan Chase Bank, NA Monroe, LA	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? **Yes**

#	Date	Parties Involved	Type	Status and Terms	Comments
1	Feb 2002	State of Tennessee Nashville, TN	Other (Legislative Pension)	Legislative Pension with the State of TN	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.

