



Return to the search tab to select another report.

## Annual Report for Calendar 2024

The Honorable Mazie K Hirono (Hirono, Mazie Keiko)

Filed 08/08/2025 @ 2:11 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? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Spouse	Salary	Law Office of Leighton K Oshima ALC HONOLULU, HAWAII	> \$1,000	n/a
2	Self	Pension	Employees' Retirement System of the State of Hawaii HONOLULU, HAWAII	\$57,842.52	n/a
3	Self	Other (IRA required minimum distribution)	Pershing LLC Honolulu, HI	\$2,146.59	IRA transferred from Capital Bank & Trust to Pershing LLC
4	Spouse	Other (IRA required minimum distribution)	Wells Fargo Clearing Services Honolulu, HI	> \$1,000	n/a
5	Spouse	Other (IRA required minimum distribution)	Pershing LLC Honolulu, HI	> \$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	<b>Hawaii State FCU</b> (HONOLULU, HAWAII) <i>Type: Checking, Savings,</i>	Bank Deposit	Joint	\$100,001 - \$250,000	Interest,	None (or less than \$201)
2	<b>Territorial Savings</b> (HONOLULU, HAWAII) <i>Type: Checking, Savings,</i>	Bank Deposit	Joint	\$100,001 - \$250,000	Interest,	None (or less than \$201)
3	<b>Royal Business Bank</b> (HONOLULU, HAWAII) <i>Type: Checking,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Interest,	None (or less than \$201)
4	<b>Wells Fargo Liquid Asset Fund</b> (HONOLULU, HAWAII) <i>Type: Certificate of Deposit, Money Market Account,</i>	Bank Deposit	Spouse	\$100,001 - \$250,000	Interest,	\$2,501 - \$5,000
5	<b>Congressional FCU</b>	Bank Deposit	Joint	\$100,001 -	None, Interest,	None (or

	(Washington, DC) Asset Type: Checking, Savings,	Asset Type	Owner	\$250,000 Value	Income Type	less than Income \$201)
6	<b>U.S. Senate FCU</b> (Washington, DC) Type: Savings,	Bank Deposit	Self	\$50,001 - \$100,000	Interest,	None (or less than \$201)
7	<b>MFC-Manulife Financial Corporation</b> (NYSE)	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Dividends,	\$2,501 - \$5,000
8	<b>SLF-Sun Life Financial Inc. (NYSE)</b>	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
9	<a href="#">CSIEX</a> - <b>Calvert Equity Fund Class A</b> Filer comment: Share class exchange CSIEX to CEYIX	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)
10	<a href="#">CSXRX</a> - <b>Calvert U.S. Large Cap Core Responsible Index Fu</b> Filer comment: Share class exchange CSXRX to CISIX	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)
11	<a href="#">CTCAX</a> - <b>Columbia Global Technology Growth Fund Class A</b> Filer comment: Share class exchange CTCAX to CTYRX to CMTFX	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)
12	<a href="#">SLMCX</a> - <b>Columbia Seligman Technology &amp; Information Fund</b> Filer comment: Share class exchange SLMCX to SCIOX to CCIZX	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)
13	<a href="#">AMCFX</a> - <b>Amcap Fund Class F-2 Shares</b>	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Excepted Investment Fund,	\$5,001 - \$15,000
14	<a href="#">CAIFX</a> - <b>Capital Income Builder CI F-2 Shs</b>	Mutual Funds Mutual Fund	Joint	\$500,001 - \$1,000,000	Excepted Investment Fund,	\$15,001 - \$50,000
15	<a href="#">WGIFX</a> - <b>Capital World Growth and Income Fund Class F-2 S</b>	Mutual Funds Mutual Fund	Joint	\$500,001 - \$1,000,000	Excepted Investment Fund,	\$15,001 - \$50,000
16	<a href="#">AMEFX</a> - <b>The Income Fund of America Class F-2 Shares</b>	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Excepted Investment Fund,	\$15,001 - \$50,000
17	<a href="#">ICAFX</a> - <b>The Investment Company of America Class F-2 Shs</b>	Mutual Funds Mutual Fund	Joint	\$250,001 - \$500,000	Excepted Investment Fund,	\$15,001 - \$50,000
18	<a href="#">NFFFX</a> - <b>New World Fund Inc. Class F-2 Shs</b>	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Excepted Investment	\$1,001 - \$2,500

Line	Asset	Asset Type	Owner	Value	Investment Fund Income Type	Income
19	<a href="#">PGWFX</a> - American Funds Global Growth Portfolio Class F-2	Mutual Funds Mutual Fund	Joint	\$250,001 - \$500,000	Excepted Investment Fund,	\$5,001 - \$15,000
20	<a href="#">CEYIX</a> - Calvert Equity Fund Class I <i>Filer comment: Share Class Exchange from CSIEX to CEYIX</i>	Mutual Funds Mutual Fund	Joint	\$250,001 - \$500,000	Excepted Investment Fund,	\$15,001 - \$50,000
21	<a href="#">CISIX</a> - Calvert U.S. Large-Cap Core Responsible Index Fu <i>Filer comment: Share class exchange from CSXRX to CISIX</i>	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500
22	<a href="#">CMTFX</a> - Columbia Global Technology Growth Fund Class I <i>Filer comment: Share class exchange from CTCAX to CTYRX to CMTFX</i>	Mutual Funds Mutual Fund	Joint	\$250,001 - \$500,000	Excepted Investment Fund,	\$2,501 - \$5,000
23	<a href="#">CCIZX</a> - Columbia Seligman Technology and Information Fun <i>Filer comment: Share class exchange from SLMCX to SCIOX to CCIZX</i>	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$5,001 - \$15,000
24	<a href="#">PREIX</a> - T. Rowe Price Equity Index Fund	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
25	<a href="#">FAGCX</a> - Fidelity Advisor Growth Opportunities Fund Clas <i>Filer comment: Purchases less than \$1001</i>	Mutual Funds Mutual Fund	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	\$201 - \$1,000
26	<a href="#">GWPEX</a> - American Funds Growth Portfolio Class F-2 <i>Filer comment: Purchases less than \$1001</i>	Mutual Funds Mutual Fund	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	\$201 - \$1,000
27	<a href="#">TRBCX</a> - T. Rowe Price Blue Chip Growth Fund Inc. <i>Filer comment: Purchases less than \$1001</i>	Mutual Funds Mutual Fund	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	\$201 - \$1,000
28	<b>EMPLOYEES' RETIREMENT SYSTEM OF THE STATE OF HAWAII</b>	Retirement Plans Defined Benefit Pension Plan	Self	\$500,001 - \$1,000,000	None,	None (or less than \$201)
29	<b>RESIDENTIAL RENTAL</b> <i>Description: RESIDENTIAL RENTAL (HONOLULU, HAWAII)</i>	Real Estate Residential	Joint	\$250,001 - \$500,000	Rent/Royalties,	\$15,001 - \$50,000
30	<b>Spouse IRA Wells Fargo Clearing Services</b>	Retirement Plans IRA	Spouse			
30.1	<a href="#">FTIXX</a> - Goldman Sachs Trust - Goldman Sachs Financial Squa	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)

30.2	<a href="#">Asset</a> <a href="#">BAGIX</a> - Baird Aggregate Bond Fund Institutional Class	Asset Type Mutual Funds Mutual Fund	Owner Spouse	Value \$15,001 - \$50,000	Income Type Excepted Investment Fund,	Income None (or less than \$201)
30.3	<a href="#">EIBIX</a> - Eaton Vance Income Fd of Boston Insti Shs	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
30.4	<a href="#">WMFFX</a> - Washington Mutual Investors Fund CI F-2 Shs	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
30.5	<a href="#">MEDIX</a> - MFS Emerging Markets Debt Fund Class I	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
30.6	<a href="#">PTTRX</a> - Pimco Funds Total Return Fund Institutional Shar	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
30.7	<a href="#">TRBCX</a> - T. Rowe Price Blue Chip Growth Fund Inc.	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
30.8	<a href="#">TMCPX</a> - Touchstone Midcap Fund Class Y	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
30.9	<a href="#">JMUEX</a> - Jpmorgan U.S. Equity Fund Class L	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
30.10	<a href="#">WOBDX</a> - Jpmorgan Core Bond Fund I Class	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
30.11	<a href="#">APDKX</a> - Artisan International Value Fund Advisor Shares	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
30.12	<a href="#">TROSX</a> - T. Rowe Price Overseas Stock Fund	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
30.13	<a href="#">ECSWX</a> - Embark Commodity Strategy Fund Institutional Cla	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
30.14	<a href="#">LMGNX</a> - Clearbridge International Growth Fund Class I	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
30.15	<a href="#">ESCWX</a> - Embark Small Cap Equity Fund Institutional Class	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
31	<b>IRA PLAN Pershing LLC</b>	Retirement Plans IRA	Self			
31.1	<a href="#">AMBFX</a> - American Balanced Fund Class F-2 Shs	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
31.2	<a href="#">CMTFX</a> - Columbia Global Technology Growth Fund Class I <i>Filer comment: Share class exchange from CTYRX to CMTFX</i>	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
31.3	<a href="#">FBALX</a> - Fidelity Balanced Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
31.4	<a href="#">LSYIX</a> - Lord Abbett Short Duration High Yield Fund Class	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
31.5	<a href="#">PRCOX</a> - T. Rowe Price U.S. Equity Research Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
32	<b>Law Office of Leighton K Oshima, ALC</b> <i>Description: Law Firm (Honolulu, HI)</i>	Other Securities	Spouse			
32.1	<b>First Hawaiian Bank</b> (HONOLULU, HAWAII) <i>Type: Checking, Savings,</i>	Bank Deposit	Spouse	\$100,001 - \$250,000	None,	None (or less than \$201)
33	<a href="#">MFC</a> - Manulife Fin	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
34	<b>American Savings Bank</b> (Honolulu, HI) <i>Type: Checking, Savings,</i>	Bank Deposit	Spouse	\$15,001 - \$50,000	Interest,	None (or less than \$201)
35	<b>Pershing LLC IRA</b>	Retirement Plans IRA	Spouse			
35.1	<a href="#">CMTFX</a> - Columbia Global Technology Growth Fund Class I <i>Filer comment: Share class exchange from CTYRX to CMTFX</i>	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
35.2	<a href="#">FBALX</a> - Fidelity Balanced Fund	Mutual Funds Mutual Fund	Spouse	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
35.3	<a href="#">LSYIX</a> - Lord Abbett Short Duration High Yield Fund Class	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)

35.4	<a href="#">Asset</a> <a href="#">PRCOX</a> - T. Rowe Price U.S. Equity Research Fund	Asset Type Mutual Funds Mutual Fund	Owner Spouse	Value \$100,001 - \$250,000	Income Type Excepted Investment Fund,	Income None (or less than \$201)
35.5	<a href="#">AMBFX</a> - American Balanced Fund Class F-2 Shs	Mutual Funds Mutual Fund	Spouse	\$250,001 - \$500,000	Excepted Investment Fund,	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	Self	<a href="#">LSYIX</a>	Lord Abbett Short Duration High Yield Fund Class	Purchase	03/05/2024	\$1,001 - \$15,000	n/a
2	Self	<a href="#">FBALX</a>	Fidelity Balanced Fund	Purchase	03/05/2024	\$1,001 - \$15,000	n/a
3	Self	<a href="#">CTYRX</a>	Columbia Global Technology Growth Fund Class Adv	Purchase	03/05/2024	\$1,001 - \$15,000	n/a
4	Self	<a href="#">CEYIX</a>	Calvert Equity Fund Class I	Purchase	03/05/2024	\$1,001 - \$15,000	n/a
5	Self	<a href="#">ANBFX</a>	American Funds Strategic Bond Fund Class F-2	Purchase	03/05/2024	\$1,001 - \$15,000	n/a
6	Self	<a href="#">BLPEX</a>	American Funds Moderate Growth and Income Portfo	Purchase	03/05/2024	\$1,001 - \$15,000	n/a
7	Self	<a href="#">PRCOX</a>	T. Rowe Price U.S. Equity Research Fund	Purchase	12/31/2024	\$1,001 - \$15,000	n/a
8	Self	<a href="#">AMBFX</a>	American Balanced Fund Class F-2 Shs	Purchase	12/31/2024	\$1,001 - \$15,000	n/a
9	Self	<a href="#">AMBFX</a>	American Balanced Fund Class F-2 Shs	Sale (Partial)	03/05/2024	\$15,001 -	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
						\$50,000	
10	Self	<a href="#">AMBFX</a>	American Balanced Fund Class F-2 Shs	Sale (Partial)	03/05/2024	\$1,001 - \$15,000	n/a
11	Self	<a href="#">CEYIX</a>	Calvert Equity Fund Class I	Sale (Partial)	11/07/2024	\$1,001 - \$15,000	n/a
12	Self	<a href="#">FBALX</a>	Fidelity Balanced Fund	Sale (Partial)	12/31/2024	\$1,001 - \$15,000	n/a
13	Self	<a href="#">CEYIX</a>	Calvert Equity Fund Class I	Sale (Full)	12/31/2024	\$1,001 - \$15,000	n/a
14	Self	<a href="#">ANBFX</a>	American Funds Strategic Bond Fund Class F-2	Sale (Full)	12/31/2024	\$1,001 - \$15,000	n/a
15	Spouse	<a href="#">LSYIX</a>	Lord Abbett Short Duration High Yield Fund Class	Purchase	01/30/2024	\$100,001 - \$250,000	n/a
16	Spouse	<a href="#">FBALX</a>	Fidelity Balanced Fund	Purchase	01/30/2024	\$250,001 - \$500,000	n/a
17	Spouse	<a href="#">CTYRX</a>	Columbia Global Technology Growth Fund Class Adv	Purchase	01/30/2024	\$100,001 - \$250,000	n/a
18	Spouse	<a href="#">CEYIX</a>	Calvert Equity Fund Class I	Purchase	01/30/2024	\$100,001 - \$250,000	n/a
19	Spouse	<a href="#">ANBFX</a>	American Funds Strategic Bond Fund Class F-2	Purchase	01/30/2024	\$50,001 - \$100,000	n/a
20	Spouse	<a href="#">BLPEX</a>	American Funds Moderate Growth and Income Portfo	Purchase	01/30/2024	\$250,001 - \$500,000	n/a
21	Spouse	<a href="#">PRCOX</a>	T. Rowe Price U.S. Equity Research Fund	Purchase	12/31/2024	\$100,001 - \$250,000	n/a
22	Spouse	<a href="#">LSYIX</a>	Lord Abbett Short Duration High Yield Fund Class	Purchase	12/31/2024	\$15,001 - \$50,000	n/a
23	Spouse	<a href="#">AMBFX</a>	American Balanced Fund Class F-2 Shs	Purchase	12/31/2024	\$250,001 - \$500,000	n/a
24	Spouse	<a href="#">CEYIX</a>	Calvert Equity Fund Class I	Sale (Partial)	11/07/2024	\$15,001	n/a

#	Owner	Ticker	Class I Asset Name	(Partial) Transaction Type	Transaction Date	- \$50,000 Amount	Comments
25	Spouse	<a href="#">FBALX</a>	Fidelity Balanced Fund	Sale (Partial)	12/31/2024	\$15,001 - \$50,000	n/a
26	Spouse	<a href="#">CEYIX</a>	Calvert Equity Fund Class I	Sale (Full)	12/31/2024	\$50,001 - \$100,000	n/a
27	Spouse	<a href="#">ANBFX</a>	American Funds Strategic Bond Fund Class F-2	Sale (Full)	12/31/2024	\$50,001 - \$100,000	n/a
28	Spouse	<a href="#">BLPEX</a>	American Funds Moderate Growth and Income Portfo	Sale (Full)	12/31/2024	\$1,001 - \$15,000	n/a
29	Spouse	<a href="#">CMTFX</a>	Columbia Global Technology Growth Fund Class I	Sale (Partial)	12/31/2024	\$15,001 - \$50,000	n/a
30	Joint	<a href="#">PREIX</a>	T. Rowe Price Equity Index Fund	Purchase	11/20/2024	\$15,001 - \$50,000	n/a
31	Joint	<a href="#">ABNFX</a>	The Bond Fd of America Class F-2 Shares	Sale (Full)	03/06/2024	\$15,001 - \$50,000	n/a
32	Spouse	<a href="#">WOBDX</a>	Jpmorgan Core Bond Fund I Class	Purchase	01/25/2024	\$1,001 - \$15,000	n/a
33	Spouse	<a href="#">ECSWX</a>	Embark Commodity Strategy Fund Institutional Cla	Purchase	03/06/2024	\$1,001 - \$15,000	n/a
34	Spouse	<a href="#">LMGNX</a>	Clearbridge International Growth Fund Class I	Purchase	04/23/2024	\$1,001 - \$15,000	n/a
35	Spouse	<a href="#">ECSWX</a>	Embark Commodity Strategy Fund Institutional Cla	Purchase	07/30/2024	\$1,001 - \$15,000	n/a
36	Spouse	<a href="#">EIBIX</a>	Eaton Vance Income Fd of Boston Insti Shs	Purchase	08/19/2024	\$1,001 - \$15,000	n/a
37	Spouse	<a href="#">ESCWX</a>	Embark Small Cap Equity Fund Institutional Class	Purchase	08/19/2024	\$1,001 - \$15,000	n/a
38	Spouse	<a href="#">TMCPX</a>	Touchstone Midcap Fund Class Y	Purchase	08/19/2024	\$1,001 - \$15,000	n/a

39 #	Spouse Owner	<a href="#">PGOVX</a> Ticker	Pimco Funds Long-Term US Government Fund	Transaction Sale (Full)	Transaction 01/25/2024 Date	\$1,001 - \$15,000 Amount	n/a Comments
			Government Fund				
			Institu				
40	Spouse	<a href="#">WMFFX</a>	Washington Mutual Investors Fund CI F-2 Shs	Sale (Partial)	02/26/2024	\$1,001 - \$15,000	n/a
41	Spouse	<a href="#">TRBCX</a>	T. Rowe Price Blue Chip Growth Fund Inc.	Sale (Partial)	02/26/2024	\$1,001 - \$15,000	n/a
42	Spouse	<a href="#">TMCPX</a>	Touchstone Midcap Fund Class Y	Sale (Partial)	02/26/2024	\$1,001 - \$15,000	n/a
43	Spouse	<a href="#">JCRIX</a>	Alps/Corecommodity Management Completed Commodity	Sale (Full)	03/06/2024	\$1,001 - \$15,000	n/a
44	Spouse	<a href="#">TROSX</a>	T. Rowe Price Overseas Stock Fund	Sale (Partial)	04/23/2024	\$1,001 - \$15,000	n/a
45	Spouse	<a href="#">WMFFX</a>	Washington Mutual Investors Fund CI F-2 Shs	Sale (Partial)	07/29/2024	\$1,001 - \$15,000	n/a
46	Spouse	<a href="#">WOBDX</a>	Jpmorgan Core Bond Fund I Class	Sale (Partial)	07/29/2024	\$1,001 - \$15,000	n/a
47	Spouse	<a href="#">BUBIX</a>	Baird Ultra Short Bond Fund Inst CI	Sale (Full)	08/19/2024	\$1,001 - \$15,000	n/a
48	Spouse	<a href="#">BAGIX</a>	Baird Aggregate Bond Fund Institutional Class	Sale (Partial)	08/19/2024	\$15,001 - \$50,000	n/a
49	Self	<a href="#">BLPEX</a>	American Funds Moderate Growth and Income Portfo	Sale (Full)	12/31/2024	\$1,001 - \$15,000	n/a
50	Spouse	<a href="#">BLPEX</a>	American Funds Moderate Growth and Income Portfo	Sale (Partial)	12/31/2024	\$250,001 - \$500,000	n/a
51	Spouse	<a href="#">WMFFX</a>	Washington Mutual Investors Fund CI F-2 Shs	Purchase	06/13/2024	\$1,001 - \$15,000	n/a
52	Spouse	<a href="#">WMFFX</a>	Washington Mutual Investors Fund CI F-2 Shs	Purchase	12/20/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
53	Spouse	<a href="#">TRBCX</a>	T. Rowe Price Blue Chip Growth Fund Inc.	Purchase	12/13/2024	\$1,001 - \$15,000	n/a
54	Spouse	<a href="#">CMTFX</a>	Columbia Global Technology Growth Fund Class I	Purchase	12/17/2024	\$1,001 - \$15,000	n/a
55	Spouse	<a href="#">FBALX</a>	Fidelity Balanced Fund	Purchase	04/08/2024	\$1,001 - \$15,000	n/a
56	Spouse	<a href="#">FBALX</a>	Fidelity Balanced Fund	Purchase	07/08/2024	\$1,001 - \$15,000	n/a
57	Spouse	<a href="#">FBALX</a>	Fidelity Balanced Fund	Purchase	10/15/2024	\$1,001 - \$15,000	n/a
58	Spouse	<a href="#">FBALX</a>	Fidelity Balanced Fund	Purchase	10/15/2024	\$1,001 - \$15,000	n/a
59	Spouse	<a href="#">FBALX</a>	Fidelity Balanced Fund	Purchase	12/23/2024	\$1,001 - \$15,000	n/a
60	Spouse	<a href="#">FBALX</a>	Fidelity Balanced Fund	Purchase	12/23/2024	\$1,001 - \$15,000	n/a
61	Spouse	<a href="#">BLPEX</a>	American Funds Moderate Growth and Income Portfo	Purchase	06/26/2024	\$1,001 - \$15,000	n/a
62	Spouse	<a href="#">BLPEX</a>	American Funds Moderate Growth and Income Portfo	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
63	Spouse	<a href="#">BLPEX</a>	American Funds Moderate Growth and Income Portfo	Purchase	12/30/2024	\$1,001 - \$15,000	n/a
64	Spouse	<a href="#">BLPEX</a>	American Funds Moderate Growth and Income Portfo	Purchase	12/30/2024	\$1,001 - \$15,000	n/a
65	Spouse	<a href="#">CEYIX</a>	Calvert Equity Fund Class I	Purchase	12/13/2024	\$1,001 - \$15,000	n/a
66	Joint	<a href="#">AMEFX</a>	The Income Fund of America Class F-2 Shares	Purchase	03/12/2024	\$1,001 - \$15,000	n/a
67	Joint	<a href="#">AMEFX</a>	The Income Fund of America Class F-2 Shares	Purchase	06/11/2024	\$1,001 - \$15,000	n/a
68	Joint	<a href="#">AMEFX</a>	The Income Fund of America Class F-2	Purchase	09/17/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Shares	Transaction	Transaction	Amount	Comments
			Asset Name	Type	Date		
69	Joint	<a href="#">AMEFX</a>	The Income Fund of America Class F-2 Shares	Purchase	12/17/2024	\$1,001 - \$15,000	n/a
70	Joint	<a href="#">AMEFX</a>	The Income Fund of America Class F-2 Shares	Purchase	12/17/2024	\$1,001 - \$15,000	n/a
71	Joint	<a href="#">WGIFX</a>	Capital World Growth and Income Fund Class F-2 S	Purchase	03/12/2024	\$1,001 - \$15,000	n/a
72	Joint	<a href="#">WGIFX</a>	Capital World Growth and Income Fund Class F-2 S	Purchase	06/11/2024	\$1,001 - \$15,000	n/a
73	Joint	<a href="#">WGIFX</a>	Capital World Growth and Income Fund Class F-2 S	Purchase	09/17/2024	\$1,001 - \$15,000	n/a
74	Joint	<a href="#">WGIFX</a>	Capital World Growth and Income Fund Class F-2 S	Purchase	12/18/2024	\$15,001 - \$50,000	n/a
75	Joint	<a href="#">WGIFX</a>	Capital World Growth and Income Fund Class F-2 S	Purchase	12/18/2024	\$1,001 - \$15,000	n/a
76	Joint	<a href="#">CAIFX</a>	Capital Income Builder CI F-2 Shs	Purchase	03/12/2024	\$1,001 - \$15,000	n/a
77	Joint	<a href="#">CAIFX</a>	Capital Income Builder CI F-2 Shs	Purchase	06/11/2024	\$1,001 - \$15,000	n/a
78	Joint	<a href="#">CAIFX</a>	Capital Income Builder CI F-2 Shs	Purchase	09/17/2024	\$1,001 - \$15,000	n/a
79	Joint	<a href="#">CAIFX</a>	Capital Income Builder CI F-2 Shs	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
80	Joint	<a href="#">CAIFX</a>	Capital Income Builder CI F-2 Shs	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
81	Joint	<a href="#">ICAFX</a>	The Investment Company of America Class F-2 Shs	Purchase	03/14/2024	\$1,001 - \$15,000	n/a
82	Joint	<a href="#">ICAFX</a>	The Investment Company of America Class F-2 Shs	Purchase	06/13/2024	\$1,001 - \$15,000	n/a
83	Joint	<a href="#">ICAFX</a>	The Investment	Purchase	06/13/2024	\$1,001 -	n/a

#	Owner	Ticker	Company of America Class F-2 Shs	Transaction Type	Transaction Date	\$1,001 - \$15,000 Amount	n/a Comments
84	Joint	<a href="#">ICAFX</a>	The Investment Company of America Class F-2 Shs	Purchase	09/19/2024	\$1,001 - \$15,000	n/a
85	Joint	<a href="#">ICAFX</a>	The Investment Company of America Class F-2 Shs	Purchase	12/18/2024	\$15,001 - \$50,000	n/a
86	Joint	<a href="#">ICAFX</a>	The Investment Company of America Class F-2 Shs	Purchase	12/18/2024	\$1,001 - \$15,000	n/a
87	Joint	<a href="#">AMCFX</a>	Amcap Fund Class F-2 Shares	Purchase	06/13/2024	\$1,001 - \$15,000	n/a
88	Joint	<a href="#">AMCFX</a>	Amcap Fund Class F-2 Shares	Purchase	12/18/2024	\$1,001 - \$15,000	n/a
89	Joint	<a href="#">CCIZX</a>	Columbia Seligman Technology and Information Fun	Purchase	12/10/2024	\$1,001 - \$15,000	n/a
90	Joint	<a href="#">CEYIX</a>	Calvert Equity Fund Class I	Purchase	12/13/2024	\$15,001 - \$50,000	n/a
91	Joint	<a href="#">CMTFX</a>	Columbia Global Technology Growth Fund Class I	Purchase	12/17/2024	\$1,001 - \$15,000	n/a
92	Joint	<a href="#">PGWFX</a>	American Funds Global Growth Portfolio Class F-2	Purchase	12/30/2024	\$1,001 - \$15,000	n/a
93	Joint	<a href="#">PGWFX</a>	American Funds Global Growth Portfolio Class F-2	Purchase	12/30/2024	\$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	2013	Joint	Mortgage	0	3.50% (30 YEARS)	\$100,001 - \$250,000	CALIBER HOME LOANS EWING, NJ	n/a
2	2021	Joint	Mortgage	1.5	2.625% (30 years)	\$250,001 - \$500,000	TERRITORIAL SAVINGS BANK HONOLULU, HI	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	Jan 2003	Hawaii Employees Retirement System Honolulu, HI	Continuation of payments by former employer	Retirement health benefits and pension for former employment with the Hawaii State Government.	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.*

