Return to the search tab to select another report.

Annual Report for Calendar 2024

The Honorable Michael F Bennet (Bennet, Michael)

Filed 05/12/2025 @ 9:50 AM

Print Report

The following statements were checked before filing:

- [x] I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- [x] 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	University of Denver Law School Denver, CO	> $1,000	n/a
2	Self	Other (Inherited IRA Required Minimum Beneficiary Distribution)	Raymond James Trust Company of New Hampshire St. Petersburg, FL	$20,145.00	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	**PERA - Public Employees' Retirement Association of Colorado**	Retirement Plans Defined Benefit Pension Plan	Self	$50,001 - $100,000	Excepted Investment Fund,	None (or less than $201)
2	**Truist - f/k/a Suntrust** (Richmond, VA) *Type:* Certificate of Deposit,	Bank Deposit	Spouse	$1,001 - $15,000	None,	None (or less than $201)
3	**CollegeInvest Fund** *Institution:* CollegeInvest	Education Savings Plans 529 College Savings Plan	Spouse			
3.1	**Moderate Age-Based Option: Income Portfolio**	Mutual Funds Mutual Fund	Spouse	$100,001 - $250,000	Excepted Investment Fund,	None (or less than $201)
3.2	**Conservative Age-Based Option: Interest Accumulation Portfolio**	Mutual Funds Mutual Fund	Spouse	$100,001 - $250,000	Excepted Investment Fund,	None (or less than $201)
4	**CollegeInvest Fund** *Institution:* CollegeInvest	Education Savings Plans 529 College Savings Plan	Child			
4.1	**Moderate Age-Based option: Income Portfolio**	Mutual Funds Mutual Fund	Child	$50,001 - $100,000	Excepted Investment Fund,	None (or less than $201)
4.2	**Conservative Age-Based option: Interest Accumulation Portfolio**	Mutual Funds Mutual Fund	Child	$15,001 - $50,000	Excepted Investment Fund,	None (or less than $201)
5	**Daggett Farms Limited Partnership** *Description:* 1500 acre family farm (Marianna, AR) *Filer comment:* 9.42% limited partnership	Farm	Spouse	$15,001 - $50,000	Rent/Royalties, Interest,	$5,001 - $15,000
6	**LMD Farms Limited Partnership** *Description:* 1500 acre family farm (Marianna, AR) *Filer comment:* 8.97% limited partnership	Farm	Spouse	$15,001 - $50,000	Rent/Royalties, Interest,	$15,001 - $50,000
7	**The Michael F. Bennet Trust**	Trust General Trust	Self			
7.1	**Charles Schwab Bank** (Denver, CO) *Type:* Money Market Account	Bank Deposit	Self	$15,001 - $50,000	Interest,	$201 - $1,000

	Type: Money Market Account, Asset	Asset Type	Owner	Value	Income Type	Income
7.2	**SPY - SPDR S&P 500 ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,000,001 - $5,000,000	Excepted Investment Fund,	$15,001 - $50,000
7.3	**EAERX - Eaton Vance Stock A**	Mutual Funds Mutual Fund	Self	$1,000,001 - $5,000,000	Excepted Investment Fund,	$100,001 - $1,000,000
7.4	**Canyon Balanced Fund LP** *Description*: Hedge fund (Los Angeles, CA)	Investment Fund Hedge Fund	Self	$1,000,001 - $5,000,000	Excepted Investment Fund,	$50,001 - $100,000
7.5	**Belmar HH Owner LLC** *Description:* Hotel (Lakewood, CO)	Real Estate Commercial	Self	$15,001 - $50,000	Other, (Ordinary Business Income)	$15,001 - $50,000 Other $15,001.00
7.6	**CP Block A Member, LLC** *Description:* Mixed use development (Denver, CO)	Real Estate Commercial	Self	$15,001 - $50,000	None,	None (or less than $201)
7.7	**LUMN - Lumen Technologies, Inc.**	Corporate Securities Stock	Self	$15,001 - $50,000	None,	None (or less than $201)
7.8	**Continuum Real Estate Investors 2016, LLC** *Company:* Continuum Real Estate Investors 2016, LLC (Denver, CO) *Description:* Commercial Real Estate	Business Entity Limited Liability Company (LLC)	Self			
7.8.1	**Continuum Market Station, LLC** *Description:* Continuum Market Station, LLC (Denver, CO)	Real Estate Commercial	Self	$100,001 - $250,000	None,	None (or less than $201)
7.8.2	**Continuum 640 Santa Fe, LLC** *Description:* Continuum 640 Santa Fe, LLC (Los Angeles, CA)	Real Estate Commercial	Self	$100,001 - $250,000	None,	None (or less than $201)
7.8.3	**CP 90Co Member, LLC** *Description:* CP 90Co Member, LLC (Denver, CO)	Real Estate Commercial	Self	$100,001 - $250,000	None,	None (or less than $201)
7.9	**Madeira Capital Investments Limited** *Company:* Madeira Capital Investments Limited (Ebene, Muritius (India)) *Description:* Private Equity - Retail	Business Entity Limited Partnership (LP)	Self			
7.9.1	**More** *Description*: Grocery Chain (Ebene, Muritius (India))	Other Securities	Self	$250,001 - $500,000	None,	None (or less than $201)
7.10	**CP Kent Place Member, LLC** *Description:* CP Kent Place Member, LLC	Real Estate Commercial	Self	$100,001 - $250,000	Rent/Royalties,	$5,001 - $15,000

(Denver, CO)

	Asset	Asset Type	Owner	Value	Income Type	Income
7.11	**Oakcliff Capital Partners, LP** *Description*: Hedge Fund (New York, NY) *Filer comment:* Although we have requested addl info. from the fund mgr, addl info. is not ascertainable; & the filer has no authority to direct the investments.	Investment Fund Hedge Fund	Self	$500,001 - $1,000,000	Dividends, Interest, Capital Gains,	$15,001 - $50,000
7.12	**SNAXX - Schwab Value Advantage Money Market**	Mutual Funds Mutual Fund	Self	$1,000,001 - $5,000,000	Dividends,	$50,001 - $100,000
8	**CollegeInvest Fund** *Institution:* CollegeInvest	Education Savings Plans 529 College Savings Plan	Spouse			
8.1	**Moderate Age-Based option: Income portfolio**	Mutual Funds Mutual Fund	Spouse	$50,001 - $100,000	Excepted Investment Fund,	None (or less than $201)
8.2	**Conservative Age-Based option: Interest Accumulation Portfolio**	Mutual Funds Mutual Fund	Spouse	$50,001 - $100,000	Excepted Investment Fund,	None (or less than $201)
9	**TIAA-CREF Retirement Portfolio**	Retirement Plans Defined Contribution Pension Plan	Spouse			
9.1	**VTHRX - Vanguard Target Retirement 2030 Fund** *Filer comment:* Previously reported as VTTWX – Vanguard Instl Trgt Retire 2030 Instl	Mutual Funds Mutual Fund	Spouse	$250,001 - $500,000	Excepted Investment Fund,	None (or less than $201)
10	**WilmerHale Retirement Account**	Retirement Plans Defined Contribution Pension Plan	Self			
10.1	**Blackrock Equity Index Non-Lendable Fund Class M**	Mutual Funds Mutual Fund	Self	None (or less than $1,001)	Excepted Investment Fund,	None (or less than $201)
10.2	**VTMSX - Vanguard Tax-Managed Small Cap Adm**	Mutual Funds Mutual Fund	Self	None (or less than $1,001)	Excepted Investment Fund,	None (or less than $201)
10.3	**VTRIX - Vanguard International Value Fund**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
10.4	**VSMSX - Vanguard S&P Smallcap 600 Index Fd Insti Cl**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	None (or less than $201)

	Asset	Asset Type	Owner	Value	Income Type	Income
10.5	**Spartan 500 Index Pool Class C**	Mutual Funds Mutual Fund	Self	$50,001 - $100,000	Excepted Investment Fund,	None (or less than $201)
11	**Charles Schwab - Rollover IRA**	Retirement Plans IRA	Self			
11.1	**MDLOX - BlackRock Global Allocation Inv A**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	None (or less than $201)
12	**Empower Retirement: Anschutz Employees' Thrift Savings Plan**	Retirement Plans Defined Contribution Pension Plan	Self			
12.1	**RPTIX - T. Rowe Price Mid-Cap Growth Fund I Class**	Mutual Funds Mutual Fund	Self	$500,001 - $1,000,000	Excepted Investment Fund,	None (or less than $201)
12.2	**BTMKX - iShares MSCI EAFE International Index Fund Class K**	Mutual Funds Mutual Fund	Self	$100,001 - $250,000	Excepted Investment Fund,	None (or less than $201)
13	**Fidelity - Earthjustice 403(b) Plan** *Filer comment:* Formerly reported as Newport Group Retirement Annuity Plan	Retirement Plans Defined Contribution Pension Plan	Spouse			
13.1	**VTHRX - Vanguard Target Retirement 2030 Inv**	Mutual Funds Mutual Fund	Spouse	$500,001 - $1,000,000	Excepted Investment Fund,	None (or less than $201)
14	**Raymond James - Inherited IRA**	Brokerage/Managed Account	Self			
14.1	**BSIIX - Blackrock Strategic Income Opportunities Portfol**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	None (or less than $201)
14.2	**ABNFX - The Bond Fd of America Class F-2 Shares**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	None (or less than $201)
14.3	**MEDIX - MFS Emerging Markets Debt Fund Class I**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
14.4	**PONPX - Pimco Income Fund Class I-2**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	None (or less than $201)
14.5	**PPGNX - Pimco GNMA and Government Securities Fund Class**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	None (or less than $201)
14.6	**PMZPX - Pimco Mortgage Opportunities**	Mutual Funds	Self	$15,001 -	Excepted	None (or

	Asset	Asset Type	Owner	Value	Income Type	Income
	and Bond Fund Class	Mutual Fund		$50,000	Investment Fund,	less than $201)
14.7	**PDBZX - PGIM Total Return Bond Fund Class Z**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	None (or less than $201)
14.8	**VBIRX - Vanguard Short-Term Bond Index Fund Admiral Shar**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	None (or less than $201)
14.9	**ODVYX - Invesco Developing Markets Fund Class Y** *Filer comment:* Sold in 2024	Mutual Funds Mutual Fund	Self	None (or less than $1,001)	Excepted Investment Fund,	None (or less than $201)
14.10	**Raymond James Bank Deposit Program** (St. Petersburg, FL) *Type:* IRA Cash Accounts,	Bank Deposit	Self	$1,001 - $15,000	None,	None (or less than $201)
15	**Raymond James Brokerage Account**	Brokerage/Managed Account	Self			
15.1	**FRGXX - FIMM Government Portfolio Money Market** *Filer comment:* Money Market Mutual Fund	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	$201 - $1,000
15.2	**Raymond James Bank Deposit Program** (St. Petersburg, FL) *Type:* Brokerage Sweep Account,	Bank Deposit	Self	$15,001 - $50,000	None,	None (or less than $201)
15.3	**CIPNX - Champlain Small Company Fund Institutional Share**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	$201 - $1,000
15.4	**MASKX - Ishares Russell 2000 Small-Cap Index Fund - Inst**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	$201 - $1,000
15.5	**DFIEX - Dfa International Core Equity Portfolio**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	$201 - $1,000
15.6	**DFCEX - Dfa Emerging Markets Core Equity Portfolio**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	$201 - $1,000
15.7	**DFSCX - Dfa U.S. Micro Cap Portfolio**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
15.8	**DFAC - Dimensional ETF Trust Dimensional U.S. Core Equity**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
15.9	**SGIIX - First Eagle Global Fund Class I**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment	$2,501 - $5,000

	Asset	Asset Type	Owner	Value	Income Type	Income
15.10	**FAFTX - Franklin Federal Tax Free Income Fund Advisor Cl**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	$201 - $1,000
15.11	**GFFFX - The Growth Fund of America Class F-2 Shares**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	Excepted Investment Fund,	$2,501 - $5,000
15.12	**ICAFX - The Investment Company of America Class F-2 Shs**	Mutual Funds Mutual Fund	Self	$50,001 - $100,000	Excepted Investment Fund,	$5,001 - $15,000
15.13	**PRF - Invesco FTSE RAFI US 1000 ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
15.14	**PRGFX - T. Rowe Price Growth Stock Fd**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	$201 - $1,000
15.15	**SMCFX - Smallcap World Fund Inc. Class F-2 Shs**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
15.16	**TEAFX - American Fds The Tax-Exempt Bond Fund of Americ**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
15.17	**VINEX - Vanguard International Explorer Fund**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
15.18	**VHGEX - Vanguard Horizon Fund Vanguard Global Equity Fu**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	Excepted Investment Fund,	$201 - $1,000
15.19	**VFIAX - Vanguard 500 Index Fd Admiral Shs**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	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	EAERX	Eaton Vance Large Cap Core Research Fund Class A	Purchase	12/19/2024	$1,001 - $15,000	n/a
2	Self	EAERX	Eaton Vance Large Cap Core Research Fund Class A	Purchase	12/19/2024	$500,001 - $1,000,000	n/a
3	Self	EAERX	Eaton Vance Large Cap Core Research Fund Class A	Purchase	11/29/2024	$1,001 - $15,000	n/a
4	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	10/01/2024	$1,001 - $15,000	n/a
5	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	11/04/2024	$1,001 - $15,000	n/a
6	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	12/03/2024	$1,001 - $15,000	n/a
7	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	07/05/2024	$1,001 - $15,000	n/a
8	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	08/05/2024	$1,001 - $15,000	n/a
9	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	09/06/2024	$1,001 - $15,000	n/a
10	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	04/02/2024	$1,001 - $15,000	n/a
11	Spouse	VTHRX	Vanguard	Purchase	05/01/2024	$1,001 -	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
			Target Retirement 2030 Fund			$15,000	
12	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	06/03/2024	$1,001 - $15,000	n/a
13	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	01/03/2024	$1,001 - $15,000	n/a
14	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	02/01/2024	$1,001 - $15,000	n/a
15	Spouse	VTHRX	Vanguard Target Retirement 2030 Fund	Purchase	03/01/2024	$1,001 - $15,000	n/a
16	Self	--	Blackrock Equity Index Non-Lendable Fund Class M	Sale (Full)	01/31/2024	$50,001 - $100,000	n/a
17	Self	FXAIX	Fidelity 500 Index Fund	Purchase	01/31/2024	$50,001 - $100,000	n/a
18	Self	VTMSX	Vanguard Tax Managed Small Cap Fund Admiral Cl	Sale (Full)	01/31/2024	$15,001 - $50,000	n/a
19	Self	VSMSX	Vanguard S&P Smallcap 600 Index Fd Insti Cl	Purchase	01/31/2024	$15,001 - $50,000	n/a
20	Self	FXAIX	Fidelity 500 Index Fund	Sale (Full)	10/31/2024	$50,001 - $100,000	n/a
21	Self	--	Spartan 500 Index Pool Class C	Purchase	10/31/2024	$50,001 - $100,000	n/a
22	Child	--	Moderate Age-Based	Purchase	12/26/2024	$1,001 - $15,000	n/a

Option: Income Portfolio

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
23	Child	--	Conservative Age-Based Option: Interest Accumulation Portfolio	Purchase	12/26/2024	$1,001 - $15,000	n/a
24	Child	--	Moderate Age-Based Option: Income Portfolio	Sale (Partial)	08/05/2024	$15,001 - $50,000	n/a
25	Child	--	Conservative Age-Based Option: Interest Accumulation Portfolio	Sale (Partial)	08/05/2024	$15,001 - $50,000	n/a
26	Child	--	Conservative Age-Based Option: Interest Accumulation Portfolio	Sale (Partial)	01/12/2024	$15,001 - $50,000	n/a
27	Child	--	Moderate Age-Based Option: Income Portfolio	Sale (Partial)	01/12/2024	$15,001 - $50,000	n/a
28	Self	VBIRX	Vanguard Short-Term Bond Index Fund Admiral Shar	Sale (Partial)	12/23/2024	$1,001 - $15,000	n/a
29	Self	ODVYX	Invesco Developing Markets Fund Class Y	Sale (Full)	12/23/2024	$1,001 - $15,000	n/a
30	Self	MDLOX	Blackrock Global Alloc A	Purchase	12/20/2024	$1,001 - $15,000	n/a
31	Self	MDLOX	Blackrock Global Alloc A	Purchase	07/18/2024	$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	2021	Joint	Mortgage	0	2.75% (15 years)	$250,001 - $500,000	Wells Fargo Washington, DC	Mortgage on personal residence

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	Sep 1995	Wilmer Cutler Pickering Hale and Dorr LLP Denver, CO	Continuing participation in an employee benefit plan	Defined contribution plan	n/a
2	Jul 2005	Colorado Public Employees' Retirement Association Denver, CO	Continuing participation in an employee benefit plan	Defined benefit retirement plan	n/a
3	Nov 2018	Grove/Atlantic, Inc. New York, NY	Royalty Agreement	Advance and royalties based on customary and usual terms for book, "The Land of Flickering Lights."	n/a
4	Jul 2003	The Anschutz Corporation Denver, CO	Continuing participation in an employee benefit plan	Continued participation in defined contribution plan managed by Empower Retirement. Former employer no longer contributes to the plan.	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.