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Annual Report for Calendar 2024

The Honorable Shelley M Capito (Capito, Shelley Moore)

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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	Pension	Citigroup New York, NY	> \$1,000	n/a
2	Spouse	Board Compensation	United Bankshares, Inc. Charleston, WV	> \$1,000	n/a
3	Self	Other (IRA distribution)	Shelley M Capito Bene IRA Charleston, WV	\$7,484.00	n/a
4	Spouse	Retirement	Wells Fargo IRAs Denver, CO	> \$1,000	n/a
5	Spouse	Other (IRA Distribution)	Belle Meade Associates New York, NY	> \$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	HBAN - Huntington Bancshares Incorporated (NASDAQ)	Corporate Securities Stock	Joint	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
2	AUB - Atlantic Union Bankshares Corporation	Corporate Securities Stock	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
3	CSCO - Cisco Systems, Inc. (NASDAQ)	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
4	C-Citigroup Inc. (NYSE)	Corporate Securities Stock	Self	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
5	DIS - The Walt Disney Company (NYSE)	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
6	DUK - Duke Energy Corporation (NYSE)	Corporate	Self	\$1,001 - \$15,000	Dividends,	\$201 -

Asset	Securities Stock Asset Type	Owner	Value	Income Type	\$1,000 Income	
7	ENB - Enbridge Inc.	Corporate Securities Stock	Self	None (or less than \$1,001)	Capital Gains,	\$1,001 - \$2,500
8	TRV - The Travelers Companies, Inc. (NYSE)	Corporate Securities Stock	Self	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
9	TFC - Truist Financial Corporation	Corporate Securities Stock	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	\$1,001 - \$2,500
10	VZ - Verizon Communications Inc. (NYSE)	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	\$201 - \$1,000
11	AMGN - Amgen Inc. - Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
12	ADI - Analog Devices	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
13	BAC - Bank of America Corporation Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
14	KO - Coca-Cola Company	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
15	CMCSA - Comcast Corporation - Class A Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
16	CVS - CVS Health Corporation Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
17	FERG - Ferguson Plc	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
18	GILD - Gilead Sciences, Inc. - Common Stock	Corporate Securities	Self	\$1,001 - \$15,000	Dividends,	None (or less

Asset	Stock Asset Type	Owner	Value	Income Type	than \$201) Income	
19	LMT - Lockheed Martin Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
20	LOW - Lowe's Companies, Inc. Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
21	LVMH MOET HENNESSY LOUIS VUITTON	American Depository Receipt	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
22	MRK - Merck & Co., Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
23	MSFT - Microsoft Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
24	MDLZ - Mondelez International, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
25	NVS - Novartis AG	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
26	QCOM - QUALCOMM Incorporated - Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
27	QSR - Restaurant Brands International Inc	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
28	RHHBY - Roche Holding AG	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
29	RPM - RPM International Inc. Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)

						Income	\$201)
	Asset	Asset Type	Owner	Value		Type	Income
30	SNA - Snap-On Incorporated Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000		Dividends,	None (or less than \$201)
31	WMB - Williams Companies, Inc. (The) Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000		Dividends,	None (or less than \$201)
32	Wells Fargo (Charleston, WV) <i>Type: Brokerage Sweep Account,</i>	Bank Deposit	Self	\$50,001 - \$100,000		Interest,	None (or less than \$201)
33	WV Public Employees Retirement System	Retirement Plans Defined Benefit Pension Plan	Self	\$1,001 - \$15,000		None,	None (or less than \$201)
34	IRA	Retirement Plans IRA	Self				
34.1	SINAX-ClearBridge Large Cap Value A (NASDAQ)	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000		Dividends,	None (or less than \$201)
34.2	AUB - Atlantic Union Bankshares Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000		Dividends,	None (or less than \$201)
35	IRA 2	Retirement Plans IRA	Self				
35.1	GIS - General Mills, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000		Dividends,	None (or less than \$201)
35.2	GD - General Dynamics Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000		Dividends,	None (or less than \$201)
35.3	GWW - W.W. Grainger, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000		Dividends,	None (or less than \$201)

35.4	LHX - L3Harris Technologies, Inc. Asset	Corporate Securities Stock	Self Owner	\$1,001 - \$15,000 Value	Dividends, Type	None (or less than \$201)
35.5	ITW - Illinois Tool Works Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.6	SJM - The J. M. Smucker Company	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.7	JNJ - Johnson & Johnson	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.8	LOW - Lowe's Companies, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.9	MCD -McDonald's Corp.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.10	MDT - Medtronic plc	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.11	MSFT - Microsoft Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.12	NEE - NextEra Energy, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.13	NSC - Norfolk Southern Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.14	UBSI - United Bankshares Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.15	Wells Fargo Bank	Bank	Self	\$1,001 - \$15,000	Interest	None

35.15	Wells Fargo Bank (Washington, DC) Type: IRA Cash Accounts,	Bank Deposit Asset Type	Self Owner	\$1,001 - \$15,000 Value	Dividends, Income Type	None (or less than \$201)
35.16	TFC - Truist Financial Corporation	Corporate Securities Stock	Self	\$50,001 - \$100,000	Dividends,	\$2,501 - \$5,000
35.17	K - Kellanova Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
36	Belle Meade Associates NY, L.P. <i>Company:</i> Belle Meade Associates NY, L.P. (New York, NY) <i>Description:</i> Pooled Investment Fund	Business Entity Limited Partnership (LP)	Self	\$500,001 - \$1,000,000	Excepted Investment Fund,	None (or less than \$201)
37	WFC - Wells Fargo & Company	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
38	Life Insurance Policy <i>Provider:</i> Northwestern Mutual	Life Insurance Whole	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
39	CSCO-Cisco Systems, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	\$2,501 - \$5,000
40	C-Citigroup Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	\$201 - \$1,000
41	KO - The Coca-Cola Company (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	\$1,001 - \$2,500
42	XOM - Exxon Mobil Corporation (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	\$201 - \$1,000
43	INTC - Intel Corporation (NASDAQ)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	\$201 - \$1,000
44	IBM - International Business Machines Corporation (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
45	MSFT - Microsoft Corporation (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains.	\$2,501 - \$5,000

46	UBS - United Bankshares, Inc. - Common Stock	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Income Dividends,	\$1,001 - \$2,500
47	WFC - Wells Fargo & Company Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	\$201 - \$1,000
48	CVCIGP II <i>Company:</i> CVCIGP II U.S. Employees LP (New York, NY) <i>Description:</i> Fund of funds	Business Entity Limited Partnership (LP)	Spouse	None (or less than \$1,001)	Excepted Investment Fund,	\$201 - \$1,000
49	Edgewood Country Club <i>Company:</i> Edgewood Country Club (Charleston, WV) <i>Description:</i> Social club	Corporate Securities Non-Public Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
50	Spouse IRA 1	Retirement Plans IRA	Spouse			
50.1	KO-The Coca-Cola Company (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
50.2	XOM-Exxon Mobil Corporation (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
50.3	JNJ-Johnson & Johnson (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
50.4	MCD-McDonald's Corp. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
50.5	MSFT-Microsoft Corporation (NASDAQ)	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	Dividends,	None (or less than \$201)
50.6	MDLZ-Mondelez International, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
50.7	PFE-Pfizer Inc. (NYSE)	Corporate Securities	Spouse	\$1,001 - \$15,000	Dividends,	None (or less

Asset	Stock Asset Type	Owner	Value	Income Type	than \$201 Income
50.8 AAPL-Apple Inc.	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Dividends,	None (or less than \$201)
51 Spouse IRA 2	Retirement Plans IRA	Spouse			
51.1 Wells Fargo (Charleston, WV) <i>Type: Brokerage Sweep Account,</i>	Bank Deposit	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.2 AFL - AFLAC Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.3 APD - Air Products & Chemicals Inc. (NYSE)	Corporate Securities Stock	Spouse	None (or less than \$1,001)	Dividends,	None (or less than \$201)
51.4 ADI - Analog Devices, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.5 ADP - Automatic Data Processing, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.6 BDX - Becton, Dickinson and Company (NYSE)	Corporate Securities Stock	Spouse	None (or less than \$1,001)	Dividends,	None (or less than \$201)
51.7 CVX - Chevron Corporation (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.8 CB - The Chubb Corporation (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.9 CL - Colgate-Palmolive Co. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)

51.10	EMB - Emerson Electric Co. (NYSE)	Corporate Securities Asset Stock	Spouse Owner	\$1,001 - \$15,000 Value	Income Dividends, Type	None Income (or less than \$201)
51.11	FDS-FactSet Research Systems Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.12	GD - General Dynamics Corporation (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.13	LHX - L3Harris Technologies, Inc.	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.14	ITW - Illinois Tool Works Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.15	JNJ - Johnson & Johnson (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.16	LOW - Lowe's Companies Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.17	MCD - McDonald's Corp. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.18	MDT-Medtronic plc (NYSE)	Corporate Securities Stock	Spouse	None (or less than \$1,001)	Dividends,	None (or less than \$201)
51.19	MSFT - Microsoft Corporation (NASDAQ)	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Dividends,	None (or less than \$201)
51.20	NEE - NextEra Energy, Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)

51.21	NSC - Norfolk Southern Corporation (NYSE) Asset	Corporate Securities Asset Type Stock	Spouse Owner	None (or less than \$1,001) Value	Dividends, Income Type	None (or less Income than \$201)
51.22	ES - Eversource Energy (NYSE)	Corporate Securities Stock	Spouse	None (or less than \$1,001)	Dividends,	None (or less than \$201)
51.23	PAYX - Paychex, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.24	PEP - Pepsico, Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.25	PSX - Phillips 66 (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.26	PG - The Procter & Gamble Company (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.27	TGT - Target Corp. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.28	WMT - Wal-Mart Stores Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.29	WEC -Wisconsin Energy Corp. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.30	ABT - Abbott Laboratories	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.31	AMGN - Amgen Inc.	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.32	BLK - BlackRock, Inc.	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)

Asset	Securities Stock Asset Type	Owner	Value	Income Type	(or less than \$201)
51.33 NKE - NIKE, Inc.	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.34 ACN - Accenture plc	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.35 CSCO - Cisco Systems, Inc.	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.36 JPM - JPMorgan Chase & Co.	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.37 CMCSA - Comcast Corporation	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.38 AAPL - Apple Inc.	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Dividends,	None (or less than \$201)
51.39 LIN - Linde plc	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.40 AMT - American Tower Corporation (REIT)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.41 UNH - UnitedHealth Group Incorporated	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.42 PPG - PPG Industries, Inc. Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.43 CMS - CMS Energy Corporation Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
51.44	COST - Costco Wholesale Corporation - Common Stock	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.45	GWW - W.W. Grainger, Inc. Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.46	SPGI - S&P Global Inc	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.47	SBUX - Starbucks Corp	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.48	ZTS - Zoetis Inc Cl A	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.49	AVGO - Broadcom Ltd	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.50	CSL - Carlisle Companies Inc	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.51	GE - GE Aerospace	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52	Spouse IRA 3 CAP Group	Retirement Plans IRA	Spouse			
52.1	Wells Fargo Bank (Washington, DC) Type: IRA Cash Accounts,	Bank Deposit	Spouse	None (or less than \$1,001)	Interest,	None (or less than \$201)
52.2	UBSI - United Bankshares, Inc. - Common Stock	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	Dividends,	None (or less than \$201)

53	Spouse Rollover IRA Asset	Retirement Plan Type IRA	Spouse Owner	Value	Income Type	Income
53.1	Belle Meade Associates NT LP <i>Company:</i> Belle Meade Associates (New York, NY) <i>Description:</i> Pooled Investment Fund	Business Entity Limited Partnership (LP)	Spouse	Over \$1,000,000 and held independently by spouse or dependent child	Excepted Investment Fund,	None (or less than \$201)
54	Life Insurance Policy <i>Provider:</i> Northwestern Mutual	Life Insurance Whole	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
55	United Bankshares unvested stock grants <i>Description:</i> Corporate Director (Charleston, WV)	Other Securities	Spouse	None (or less than \$1,001)	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.

#	Transaction Date	Owner	Ticker	Asset Name	Type	Amount	Comment
1	01/19/2024	Spouse	ES	Eversource Energy	Sale (Full)	\$1,001 - \$15,000	--
2	01/19/2024	Self	ENB	Enbridge Inc	Sale (Full)	\$1,001 - \$15,000	--
3	02/09/2024	Spouse	MDT	Medtronic Inc	Sale (Full)	\$1,001 - \$15,000	--
4	02/15/2024	Spouse	BDX	Becton Dickinson and Company	Sale (Full)	\$1,001 - \$15,000	--
5	02/23/2024	Spouse	SBUX	Starbucks Corp	Purchase	\$15,001 - \$50,000	--
6	02/27/2024	Spouse	ZTS	Zoetis Inc Cl A	Purchase	\$15,001 - \$50,000	--
7	04/09/2024	Spouse	AAPL	Apple Inc	Sale (Partial)	\$1,001 - \$15,000	--
8	04/09/2024	Spouse	SPGI	S&P Global Inc	Sale (Partial)	\$1,001 - \$15,000	--
9	04/09/2024	Spouse	GWW	W.W. Grainger	Sale (Partial)	\$1,001 - \$15,000	--
10	04/09/2024	Spouse	MSFT	Microsoft Corp	Sale (Partial)	\$1,001 - \$15,000	--
11	04/23/2024	Spouse	MSFT	Microsoft Corp	Sale (Partial)	\$1,001 - \$15,000	--
12	04/23/2024	Spouse	AAPL	Apple Inc	Sale (Partial)	\$1,001 - \$15,000	--
13	04/23/2024	Spouse	JPM	JP Morgan Chase & Company	Sale (Partial)	\$1,001 - \$15,000	--

14 #	06/27/2024 Transaction Date	Spouse Owner	APD Ticker	Air Products and Chemicals Asset Name	Sale (Full) Type	\$1,001 - \$15,000 Amount	-- Comment
15	07/01/2024	Spouse	AVGO	Broadcom Ltd	Purchase	\$1,001 - \$15,000	--
16	07/17/2024	Spouse	C	Citigroup Inc	Sale (Partial)	\$1,001 - \$15,000	--
17	07/17/2024	Spouse	XOM	Exxon Mobil Corp	Sale (Partial)	\$1,001 - \$15,000	--
18	07/17/2024	Spouse	MSFT	Microsoft Corp	Sale (Partial)	\$1,001 - \$15,000	--
19	07/25/2024	Spouse	LOW	Lowe's Companies	Sale (Partial)	\$1,001 - \$15,000	--
20	07/25/2024	Spouse	PEP	Pepsico Inc	Sale (Partial)	\$1,001 - \$15,000	--
21	08/22/2024	Spouse	NSC	Norfolk Southern Corp	Sale (Partial)	\$1,001 - \$15,000	--
22	08/27/2024	Spouse	AVGO	Broadcom Inc. - Common Stock	Purchase	\$1,001 - \$15,000	--
23	08/28/2024	Spouse	NKE	Nike Inc	Purchase	\$1,001 - \$15,000	--
24	09/20/2024	Spouse	GWW	W.W. Grainger	Sale (Partial)	\$1,001 - \$15,000	--
25	09/20/2024	Spouse	MSFT	Microsoft Corp	Sale (Partial)	\$1,001 - \$15,000	--
26	09/20/2024	Spouse	ACN	Accenture Plc	Sale (Partial)	\$1,001 - \$15,000	--
27	09/20/2024	Spouse	AAPL	Apple Inc	Sale (Partial)	\$1,001 - \$15,000	--
28	09/20/2024	Spouse	NKE	Nike Inc	Sale (Partial)	\$1,001 - \$15,000	--
29	09/25/2024	Spouse	NSC	Norfolk Southern Corp	Sale (Full)	\$1,001 - \$15,000	--
30	10/08/2024	Spouse	CSL	Carlisle Companies Inc	Purchase	\$1,001 - \$15,000	--
31	12/12/2024	Spouse	AVGO	Broadcom Inc. - Common Stock	Purchase	\$1,001 - \$15,000	--
32	12/13/2024	Spouse	LOW	Lowe's Companies	Sale (Partial)	\$1,001 - \$15,000	--
33	12/16/2024	Spouse	MSFT	Microsoft Corp	Sale (Partial)	\$1,001 - \$15,000	--
34	12/20/2024	Spouse	UNH	Unitedhealth Group Inc	Sale (Partial)	\$1,001 - \$15,000	--
35	12/27/2024	Spouse	GE	GE Aerospace	Purchase	\$1,001 - \$15,000	--

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? **No**

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	2008	Joint	Line of Credit	-	7.75% (revolving)	\$100,001 - \$250,000	United Bank Charleston, WV	n/a
2	2011	Spouse	Other (Margin loan)	-	11.25% (margin)	\$15,001 - \$50,000	Wells Fargo Charleston, WV	n/a
3	2016	Joint	Mortgage	0	3.625% (30 years)	\$250,001 - \$500,000	Wells Fargo Des Moines, IA	n/a
4	2016	Joint	Mortgage	0	7.125% (30 years)	\$100,001 - \$250,000	Wells Fargo Des Moines, IA	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.

