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Annual Report for Calendar 2024

The Honorable Steve Daines (Daines, Steve)

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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? **No**

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	American Bank (Bozeman, MT) <i>Type:</i> Checking, Savings,	Bank Deposit	Joint	\$100,001 - \$250,000	Interest,	\$1,001 - \$2,500
2	Yellowstone Bank (Bozeman, MT) <i>Type:</i> Checking, Savings,	Bank Deposit	Joint	\$100,001 - \$250,000	Interest,	\$1,001 - \$2,500

3	Residential Lot <i>Asset Description:</i> Residential Lot (Bozeman, MT)	Real Estate Residential	Joint Owner	\$500,001 - \$1,000,000	None, Income Type	None (or less than \$201)
4	Ag Land Belgrade <i>Description:</i> Agriculture land (Belgrade, MT)	Real Estate Unimproved Land	Joint	\$1,000,001 - \$5,000,000	Rent/Royalties,	\$5,001 - \$15,000
5	Residential/Agricultural Property <i>Description:</i> Residential/Agricultural Property (Belgrade, MT)	Real Estate Residential	Joint	\$1,000,001 - \$5,000,000	Other, (Barley crop sales)	Other \$2,501.00
6	Genesis <i>Company:</i> Genesis Business Park (Bozeman, MT) <i>Description:</i> Commercial real estate	Business Entity Limited Liability Company (LLC)	Joint			
6.1	Gen 1 <i>Description:</i> Office Building (Bozeman, MT)	Real Estate Commercial	Joint	\$500,001 - \$1,000,000	Rent/Royalties,	\$15,001 - \$50,000
6.2	Gen 2 <i>Description:</i> Office Building (Bozeman, MT)	Real Estate Commercial	Joint	\$1,000,001 - \$5,000,000	Rent/Royalties,	\$100,001 - \$1,000,000
6.3	Gen 3 <i>Description:</i> Office Building (Bozeman, MT)	Real Estate Commercial	Joint	\$1,000,001 - \$5,000,000	Rent/Royalties,	\$100,001 - \$1,000,000
6.4	Gen Lot 3 <i>Description:</i> Lot 3 (Bozeman, MT) <i>Filer comment:</i> Empty parcel of land in Genesis Business park	Real Estate Unimproved Land	Joint	\$250,001 - \$500,000	None,	None (or less than \$201)
6.5	Gen Lot 20 <i>Description:</i> Lot 20 (Bozeman, MT) <i>Filer comment:</i> Empty parcel of land in Genesis Business park	Real Estate Unimproved Land	Joint	\$250,001 - \$500,000	None,	None (or less than \$201)
7	Gen 7 <i>Description:</i> Office Building (Bozeman, MT)	Real Estate Commercial	Joint	\$1,000,001 - \$5,000,000	Rent/Royalties,	\$100,001 - \$1,000,000
8	Vanguard Federal Money Market Fund (Settlement fund) (Monroe, WI) <i>Type:</i> Money Market Account,	Bank Deposit	Self	\$1,000,001 - \$5,000,000	Dividends,	\$50,001 - \$100,000
9	Vanguard IRA	Retirement Plans IRA	Self			
9.1	VGSTX - Vanguard Star Fund Investor Shares	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	\$1,001 - \$2,500
9.2	VSGAX - Vanguard Small-Cap Growth Index Fund Admiral Share	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
9.3	VTTHY - Vanguard Target Retirement 2025	Mutual Funds	Self	\$50,001 -	Dividends	\$1,001 -

9.3	VTIAX - Vanguard Target Retirement 2030 Fund Investor Shar	Mutual Funds Mutual Fund	Self Owner	\$50,001 - \$100,000	Dividends, Capital Gains,	\$1,501 - \$2,500
9.4	VCPAX Vanguard Core Plus Bond Admiral CL	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Dividends, Capital Gains,	\$2,501 - \$5,000
9.5	VTINX	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Dividends, Capital Gains,	\$2,501 - \$5,000
9.6	VHYAX	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
10	Vanguard Federal Money Market Fund (Monroe, WI) <i>Type: Money Market Account,</i>	Bank Deposit	Joint	\$100,001 - \$250,000	Dividends,	\$15,001 - \$50,000
11	Cultivate MD Capital Accelerator Fund <i>Description: Venture capital fund focused on medical devices. (Grand Rapids, MI)</i>	Investment Fund Private Equity Fund	Joint	\$100,001 - \$250,000	Capital Gains,	\$15,001 - \$50,000

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	VGSTX	Vanguard Star Fund	Purchase	07/31/2024	\$1,001 - \$15,000	n/a
2	Self	VTINX	Vanguard Target Retirement Income Fund	Purchase	12/30/2024	\$1,001 - \$15,000	n/a
3	Self	VTINX	Vanguard Target Retirement Income Fund	Purchase	12/30/2024	\$1,001 - \$15,000	n/a
4	Self	VTTHX	Vanguard Target Retirement 2035 Fund	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? **No**

Part 8. Positions

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

#	Position Dates	Position Held	Entity	Entity Type	Comments
1	May 1998 to present	Partner	Genesis Partners Bozeman, MT- Montana	Company	n/a

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.