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Annual Report for Calendar 2024

Mr. THEODORE P BUDD (Budd, Ted)

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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	Partnership Distributions	Budd Hope LLC Winston Salem, NC	> $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	**Ally Bank**	Bank Deposit	Joint	$50,001 -	Interest	$201 -

#	Asset	Asset Type	Owner	Value	Income Type	Income
1	**Ally Bank** (Philadelphia, Pennsylvania) *Type:* Savings,	Bank Deposit	Joint	$50,001 - $100,000	Interest,	$201 - $1,000
2	**Truist Financial** (Winston Salem, North Carolina) *Type:* Checking, Money Market Account,	Bank Deposit	Child	$1,001 - $15,000	Interest,	None (or less than $201)
3	**PS1 Rural Hall LLC** *Filer comment:* Retail sporting goods, indoor range and training facility. Doing business as ProShots.	Business Entity Sole Proprietorship	Self	$1,000,001 - $5,000,000	Other, (Business income)	Other $100,001.00
4	**Amy Kathryn Budd 2017 Irrv Trust FBO (DC3) - Trust**	Trust General Trust	Child			
4.1	**RTSSX - Russell Investment Tax-Managed U.S. Mid & Small Ca**	Mutual Funds Mutual Fund	Child	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
4.2	**RETSX - Russell Investment Tax-Managed U.S. Large Cap Fund**	Mutual Funds Mutual Fund	Child	$15,001 - $50,000	Excepted Investment Fund,	$201 - $1,000
4.3	**RTXSX - Russell Investment Tax-Managed Real Assets Fund Cl**	Mutual Funds Mutual Fund	Child	$1,001 - $15,000	Excepted Investment Fund,	$201 - $1,000
4.4	**RTHSX - Russell Investments Tax-Exempt High Yield Bond Fun**	Mutual Funds Mutual Fund	Child	$1,001 - $15,000	Excepted Investment Fund,	$1,001 - $2,500
4.5	**DFUS - Dimensional U.S. Equity ETF**	Mutual Funds Exchange Traded Fund/Note	Child	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
4.6	**DFAX - Dimensional World Ex U.S. Core Equity 2 ETF**	Mutual Funds Exchange Traded Fund/Note	Child	$15,001 - $50,000	Excepted Investment Fund,	$201 - $1,000
4.7	**DFNM - Dimensional National Municipal Bond ETF**	Mutual Funds Exchange Traded Fund/Note	Child	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
4.8	**FUMBX - Fidelity Short-Term Treasury Bond Index Fund**	Mutual Funds Mutual Fund	Child	None (or less than $1,001)	Excepted Investment Fund,	None (or less than $201)
4.9	**MUB - iShares National Muni Bond ETF**	Mutual Funds Exchange Traded Fund/Note	Child	$1,001 - $15,000	Excepted Investment Fund,	None (or less than $201)
5	**Fidelity Brokerage Services #18**	Brokerage/Managed Account	Spouse			
5.1	**RTNSX - Russell Investment Tax-**	Mutual Funds	Spouse	None (or	Excepted	None (or

	Asset	Asset Type	Owner	Value	Income Type	Income
	Managed International Equit	Mutual Fund		less than $1,001)	Investment Fund,	less than $201)
5.2	**RTXSX - Russell Investment Tax-Managed Real Assets Fund Cl**	Mutual Funds Mutual Fund	Spouse	$15,001 - $50,000	Excepted Investment Fund,	$201 - $1,000
5.3	**RTHSX - Russell Investments Tax-Exempt High Yield Bond Fun**	Mutual Funds Mutual Fund	Spouse	$15,001 - $50,000	Excepted Investment Fund,	$201 - $1,000
5.4	**DFUS - Dimensional U.S. Equity ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$100,001 - $250,000	Excepted Investment Fund,	$1,001 - $2,500
5.5	**DFAS - Dimensional U.S. Small Cap ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$15,001 - $50,000	Excepted Investment Fund,	$201 - $1,000
5.6	**DFAX - Dimensional World Ex U.S. Core Equity 2 ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$50,001 - $100,000	Excepted Investment Fund,	$1,001 - $2,500
5.7	**Fidelity - SPRXX** (Matthews, NC) *Type:* Money Market Account,	Bank Deposit	Spouse	$1,001 - $15,000	Interest,	None (or less than $201)
6	**College Foundation NC 529 Plan** *Institution:* NC	Education Savings Plans 529 College Savings Plan	Child			
6.1	**VG 12.5% Stocks 87.5% Bonds (Age-Based)** *Filer comment:* Change in investments automatic - based on age	Mutual Funds Mutual Fund	Child	None (or less than $1,001)	Excepted Investment Fund,	None (or less than $201)
7	**AKB - ROTH IRA**	Retirement Plans IRA	Spouse			
7.1	**VADDX - Invesco Equally-Weighted S&P 500 Fund Class Y**	Mutual Funds Mutual Fund	Spouse	None (or less than $1,001)	None,	None (or less than $201)
7.2	**RGISX - Russell Investments Global Infrastructure Fund Cla**	Mutual Funds Mutual Fund	Spouse	$1,001 - $15,000	None,	None (or less than $201)
7.3	**RINTX - Russell Investments International Developed Market**	Mutual Funds Mutual Fund	Spouse	$15,001 - $50,000	None,	None (or less than $201)
7.4	**RLESX - Russell Investments U.S. Small Cap Equity Fund Cla**	Mutual Funds Mutual Fund	Spouse	$1,001 - $15,000	None,	None (or less than $201)

	Asset	Asset Type	Owner	Value	Income Type	Income
7.5	**CMCYX - VanEck CM Commodity Index Fund Class Y**	Mutual Funds Mutual Fund	Spouse	$1,001 - $15,000	None,	None (or less than $201)
7.6	**RGCSX - Russell Investments Opportunistic Credit Fund Clas**	Mutual Funds Mutual Fund	Spouse	$1,001 - $15,000	None,	None (or less than $201)
7.7	**FIQGX - Fidelity Advisor Emerging Markets Discovery Fund**	Mutual Funds Mutual Fund	Spouse	$1,001 - $15,000	None,	None (or less than $201)
7.8	**DFAU - Dimensional US Core Equity Market ETF**	Mutual Funds Mutual Fund	Spouse	$1,001 - $15,000	None,	None (or less than $201)
7.9	**DUHP - Dimensional US High Profitability ETF**	Mutual Funds Mutual Fund	Spouse	$15,001 - $50,000	None,	None (or less than $201)
7.10	**CRERX - Columbia Real Estate Equity Fund Class Adv**	Mutual Funds Mutual Fund	Spouse	None (or less than $1,001)	None,	None (or less than $201)
7.11	**CREEX - Columbia Real Estate Equity Fund Class I**	Mutual Funds Mutual Fund	Spouse	$1,001 - $15,000	None,	None (or less than $201)
7.12	**PEIYX - Putnam Large Cap Value Fund Class Y**	Mutual Funds Mutual Fund	Spouse	$15,001 - $50,000	None,	None (or less than $201)
8	**TPB - ROTH IRA**	Retirement Plans IRA	Self			
8.1	**VADDX - Invesco Equally-Weighted S&P 500 Fund Class Y**	Mutual Funds Mutual Fund	Self	None (or less than $1,001)	None,	None (or less than $201)
8.2	**RGISX - Russell Investments Global Infrastructure Fund Cla**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	None,	None (or less than $201)
8.3	**RINTX - Russell Investments International Developed Market**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	None,	None (or less than $201)
8.4	**RLESX - Russell Investments U.S. Small Cap Equity Fund Cla**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	None,	None (or less than $201)
8.5	**CMCYX - VanEck CM Commodity Index Fund Class Y**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	None,	None (or less than $201)
8.6	**RGCSX - Russell Investments**	Mutual Funds	Self	$1,001 -	None,	None (or

#	Asset	Asset Type	Owner	Value	Income Type	Income
8.6	**RGCSX - Russell Investments Opportunistic Credit Fund Clas**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	None,	None (or less than $201)
8.7	**FIQGX - Fidelity Advisor Emerging Markets Discovery Fund**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	None,	None (or less than $201)
8.8	**DFAU - Dimensional US Core Equity Market ETF**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	None,	None (or less than $201)
8.9	**DUHP - Dimensional US High Profitability ETF**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	None,	None (or less than $201)
8.10	**CRERX - Columbia Real Estate Equity Fund Class Adv**	Mutual Funds Mutual Fund	Self	None (or less than $1,001)	None,	None (or less than $201)
8.11	**CREEX - Columbia Real Estate Equity Fund Class I**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	None,	None (or less than $201)
8.12	**PEIYX - Putnam Large Cap Value Fund Class Y**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	None,	None (or less than $201)
9	**Budd Family LLC** *Company:* Budd Family LLC (Winston Salem, North Carolina) *Description:* Real Estate Rental and Farm	Business Entity Limited Liability Company (LLC)	Child			
9.1	**Budd Farm** *Description:* Farm (Advance, North Carolina)	Farm	Child	$250,001 - $500,000	Rent/Royalties,	None (or less than $201)
9.2	**Beach Property** *Description:* Beach Rental Property (Wilmington, North Carolina)	Real Estate Residential	Child	$250,001 - $500,000	Rent/Royalties, Interest,	None (or less than $201)
9.3	**Budd Hope LLC** *Company:* Budd Hope LLC (Advance, NC) *Description:* Owner of commercial building	Business Entity Limited Liability Company (LLC)	Child			
9.3.1	**Real Estate** *Description:* Warehouse on Hope Church Road (Winston-Salem, NC)	Real Estate Commercial	Child	$250,001 - $500,000	Rent/Royalties,	$15,001 - $50,000
10	**Lincoln Flexible Premium Variable Life Insurance - 351**	Life Insurance Variable	Self			
10.1	**LVIP Vanguard Bnd Alloc Fnd SC (791)**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	None,	None (or less than $201)

	Asset	Asset Type	Owner	Value	Income Type	Income
10.2	**LVIP SSGA S&P 500 Index SC (946)**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	None,	None (or less than $201)
11	**Lincoln Flexible Premium Variable Life Insurance - 613**	Life Insurance Variable	Joint			
11.1	**LVIP Vanguard Bnd Alloc Fnd SC (791)**	Mutual Funds Mutual Fund	Joint	$100,001 - $250,000	None,	None (or less than $201)
11.2	**LVIP SSGA S&P 500 Index SC (946)**	Mutual Funds Mutual Fund	Joint	$100,001 - $250,000	None,	None (or less than $201)
12	**T Paul Properties, LLC** *Company:* T Paul Properties, LLC (Advance, NC) *Description:* Partner in commercial real estate business	Business Entity Limited Liability Company (LLC)	Spouse			
12.1	**Budd Hope LLC** *Company:* Budd Hope LLC (Advance, NC) *Description:* Owner of commercial building	Business Entity Limited Liability Company (LLC)	Spouse			
12.1.1	**Real Estate** *Description:* Warehouse on Hope Church Road (Winston-Salem, NC)	Real Estate Commercial	Spouse	$500,001 - $1,000,000	Rent/Royalties,	$15,001 - $50,000
13	**Citibank, NA** (Sioux Falls, SD) *Type:* Savings,	Bank Deposit	Joint	$1,001 - $15,000	Interest,	$201 - $1,000

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	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	01/08/2024	$1,001 - $15,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
2	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	02/02/2024	$1,001 - $15,000	n/a
3	Spouse	DFUS	Dimensional U.S. Equity ETF	Purchase	03/08/2024	$1,001 - $15,000	n/a
4	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	04/05/2024	$1,001 - $15,000	n/a
5	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	05/02/2024	$1,001 - $15,000	n/a
6	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	05/06/2024	$1,001 - $15,000	n/a
7	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	06/03/2024	$1,001 - $15,000	n/a
8	Spouse	RTXSX	Tax-Managed Real Assets Fund Class S	Purchase	06/05/2024	$1,001 - $15,000	n/a
9	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	07/05/2024	$1,001 - $15,000	n/a
10	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	08/01/2024	$1,001 - $15,000	n/a
11	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2	Purchase	08/05/2024	$1,001 - $15,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
			ETF				
12	Spouse	RTXSX	Tax-Managed Real Assets Fund Class S	Purchase	08/05/2024	$1,001 - $15,000	n/a
13	Spouse	DFUS	Dimensional U.S. Equity ETF	Sale (Partial)	08/06/2024	$1,001 - $15,000	n/a
14	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	09/03/2024	$1,001 - $15,000	n/a
15	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	09/06/2024	$1,001 - $15,000	n/a
16	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	10/03/2024	$1,001 - $15,000	n/a
17	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	11/01/2024	$1,001 - $15,000	n/a
18	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Purchase	11/05/2024	$1,001 - $15,000	n/a
19	Spouse	DFUS	Dimensional U.S. Equity ETF	Purchase	11/13/2024	$1,001 - $15,000	n/a
20	Spouse	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Sale (Partial)	11/13/2024	$1,001 - $15,000	n/a
21	Spouse	DFUS	Dimensional U.S. Equity ETF	Purchase	12/03/2024	$1,001 - $15,000	n/a
22	Spouse	DFUS	Dimensional	Purchase	12/04/2024	$1,001	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
22	Spouse	DFUS	Dimensional U.S. Equity ETF	Purchase	12/04/2024	$1,001 - $15,000	n/a
23	Spouse	CRERX	Columbia Real Estate Equity Fund Class Adv	Purchase	04/15/2024	$1,001 - $15,000	n/a
24	Spouse	FIQGX	Fidelity Advisor Emerging Markets Discovery Fund	Purchase	04/15/2024	$1,001 - $15,000	n/a
25	Spouse	RINTX	International Developed Markets Fund Class S	Purchase	04/15/2024	$1,001 - $15,000	n/a
26	Spouse	VADDX	Invesco Equally-Weighted S&P Fund Class Y	Sale (Full)	08/23/2024	$15,001 - $50,000	n/a
27	Spouse	PEIYX	Putnam Large Cap Value Fund Class Y	Purchase	08/23/2024	$15,001 - $50,000	n/a
28	Spouse	RINTX	International Developed Markets Fund Class S	Sale (Partial)	11/13/2024	$1,001 - $15,000	n/a
29	Spouse	PEIYX	Putnam Large Cap Value Fund Class Y	Purchase	11/13/2024	$1,001 - $15,000	n/a
30	Spouse	FIQGX	Fidelity Advisor Emerging Markets Discovery Fund	Sale (Partial)	11/26/2024	$1,001 - $15,000	n/a
31	Spouse	RLESX	U.S. Small Cap Equity Fund Class S	Purchase	11/26/2024	$1,001 - $15,000	n/a
32	Spouse	DFAU	Dimensional	Purchase	11/27/2024	$1,001	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
			US Core Equity Market ETF			- $15,000	
33	Self	CRERX	Columbia Real Estate Equity Fund Class Adv	Purchase	04/15/2024	$1,001 - $15,000	n/a
34	Self	FIQGX	Fidelity Advisor Emerging Markets Discovery Fund	Purchase	04/15/2024	$1,001 - $15,000	n/a
35	Self	RINTX	International Developed Markets Fund Class S	Purchase	04/15/2024	$1,001 - $15,000	n/a
36	Self	VADDX	Invesco Equally-Weighted S&P Fund Class Y	Sale (Full)	08/23/2024	$15,001 - $50,000	n/a
37	Self	PEIYX	Putnam Large Cap Value Fund Class Y	Purchase	08/23/2024	$15,001 - $50,000	n/a
38	Self	RINTX	International Developed Markets Fund Class S	Sale (Partial)	11/13/2024	$1,001 - $15,000	n/a
39	Self	PEIYX	Putnam Large Cap Value Fund Class Y	Purchase	11/13/2024	$1,001 - $15,000	n/a
40	Self	FIQGX	Fidelity Advisor Emerging Markets Discovery Fund	Sale (Partial)	11/26/2024	$1,001 - $15,000	n/a
41	Self	RLESX	U.S. Small Cap Equity Fund Class S	Purchase	11/26/2024	$1,001 - $15,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
42	Self	DFAU	Dimensional US Core Equity Market ETF	Purchase	11/27/2024	$1,001 - $15,000	n/a
43	Child	FUMBX	Fidelity Short-Term Treasury Bond Index Fund	Sale (Full)	02/06/2024	$1,001 - $15,000	n/a
44	Child	DFNM	Dimensional National Municipal Bond ETF	Sale (Partial)	02/08/2024	$1,001 - $15,000	n/a
45	Child	MUB	iShares National Muni Bond ETF	Purchase	02/08/2024	$1,001 - $15,000	n/a
46	Child	DFUS	Dimensional U.S. Equity ETF	Purchase	11/22/2024	$1,001 - $15,000	n/a
47	Child	DFNM	Dimensional National Municipal Bond ETF	Purchase	11/22/2024	$1,001 - $15,000	n/a
48	Child	DFAX	Dimensional World Ex U.S. Core Equity 2 ETF	Sale (Partial)	11/22/2024	$1,001 - $15,000	n/a
49	Child	--	VG 12.5% Stocks 87.5% Bonds (age based)	Sale (Partial)	04/19/2024	$15,001 - $50,000	n/a
50	Child	--	VG 12.5% Stocks 87.5% Bonds (Age Based)	Sale (Partial)	12/13/2024	$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	2017	Self	Other (Personal Guarantee of Business LOC)	-	7.5% (renewal on an annual basis)	$100,001 - $250,000	Truist Financial Charlotte, North Carolina	n/a
2	2021	Self	Line of Credit	-	9.5% (matures 11/2/2033)	$10,001 - $15,000	Truist Financial Winston Salem, North Carolina	n/a
3	2019	Joint	Mortgage	0	2.75% (15)	$250,001 - $500,000	Congressional Federal Credit Union Ewing, NJ	n/a
4	2024	Self	Other (Vehicle Loan)	-	.9% (3 years)	$50,001 - $100,000	GM Financial Cockeysville, MD	n/a

Part 8. Positions

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

#	Position Dates	Position Held	Entity	Entity Type	Comments
1	Jun 2021 to present	Other (Manager)	T Paul Properties LLC Advance, NC	Other (Single member LLC)	n/a
2	Dec 2007 to present	Officer	Budd Family Management, Inc Winston-Salem, NC	Corporation	n/a
3	Dec 2007 to present	Other (Manager)	Budd Family, LLC Winston Salem, NC	Other (LLC)	n/a
4	Jul 2017 to present	Trustee	Amy Kathryn 2017 Irrev Trust for the Benefit of Joshua Theodore Budd Advance, NC	Trust	n/a
5	Jul 2017 to present	Trustee	Amy Kathryn 2017 Irrev Trust for the Benefit of Kathryn Elizabeth Budd Advance, NC	Trust	n/a
6	Jul 2017 to present	Trustee	Amy Kathryn 2017 Irrev Trust for the Benefit of Macy Lauren Budd Advance, NC	Trust	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.