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Annual Report for Calendar 2024

Ms. Tina Smith (Smith, Tina)

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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	Other (IRA Distribution)	Charles Schwab & Co., Inc. Minneapolis, MN	> \$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
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		Retirement Plans	Spouse Owner	Value	Income Type	Income
1	Truchas Capital 401k Plan Asset	Defined Contribution Pension Plan				
1.1	Charles Schwab (Minneapolis, MN) <i>Type:</i> Brokerage Sweep Account,	Bank Deposit	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
1.2	SWVXX - Schwab Value Advantage Money Fund	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
1.3	AORT - Artivion Inc	Corporate Securities Stock	Spouse	\$250,001 - \$500,000	None,	None (or less than \$201)
1.4	TCMD - Tactile Systems Technology Inc	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	None,	None (or less than \$201)
2	Arch C Smith Revocable Trust U/A DTD 11/23/2015	Trust General Trust	Spouse			
2.1	Charles Schwab (Minneapolis, MN) <i>Type:</i> Brokerage Sweep Account,	Bank Deposit	Spouse	\$100,001 - \$250,000	Interest,	\$201 - \$1,000
2.2	BSX - Boston Scientific Corporation	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
2.3	EVTGY - Evotec AG	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
2.4	FNF - Fidelity National Financial, Inc.	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
2.5	FIS - Fidelity National Information Services, Inc. <i>Filer comment:</i> Donated shares	Corporate Securities Stock	Spouse	None (or less than \$1,001)	Dividends,	\$201 - \$1,000
2.6	PODD - Insulet Corporation	Corporate Securities Stock	Spouse	\$500,001 - \$1,000,000	Capital Gains,	\$50,001 - \$100,000
2.7	JNJ - Johnson & Johnson	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
2.8	USB - U.S. Bancorp	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000

		Stock		Income		
Asset	Asset Type	Owner	Value	Type	Income	
2.9	TCMD - Tactile Systems Technology, Inc.	Corporate	Spouse	\$100,001 - \$250,000	None,	None (or less than \$201)
2.10	PIPR - Piper Sandler Companies Common Stock	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
2.11	HBAN - Huntington Bancshares Incorporated - Common Stock	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	Dividends,	\$5,001 - \$15,000
2.12	AORT - Artivion, Inc. Common Stock	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	None,	None (or less than \$201)
3	Charles Schwab - Rollover IRA	Retirement Plans IRA	Spouse			
3.1	DXCM - DexCom, Inc.	Corporate Securities Stock	Spouse	\$500,001 - \$1,000,000	None,	None (or less than \$201)
3.2	PIPR - Piper Sandler Companies Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
3.3	TCMD - Tactile Systems Technology, Inc.	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	None,	None (or less than \$201)
3.4	USB - U.S. Bancorp	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	None,	None (or less than \$201)
3.5	Schwab Bank (Minneapolis, MN) Type: Brokerage Sweep Account,	Bank Deposit	Spouse	\$50,001 - \$100,000	None,	None (or less than \$201)
3.6	MSTY.PA - Mainstay Medical International plc	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	None,	None (or less than \$201)
3.7	SNAXX - Schwab Value Advantage Money Fund Ultra Shares	Mutual Funds Mutual Fund	Spouse	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
4	Arch C Smith Revocable Trust # 2	Trust General Trust	Spouse			
4.1	Charles Schwab (Minneapolis, MN) Type: Brokerage Sweep Account,	Bank Deposit	Spouse	\$15,001 - \$50,000	None,	None (or less than \$201)

4.2	BRK-B - Berkshire Hathaway Inc.	Corporate Securities Stock	Spouse Owner	\$250,001 - \$500,000	Income None,	None (or less than \$201)
4.3	GIS - General Mills, Inc.	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	Dividends,	\$5,001 - \$15,000
4.4	MMC - Marsh & McLennan Companies, Inc.	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
4.5	NEE - NextEra Energy, Inc.	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	Dividends, Capital Gains,	\$100,001 - \$1,000,000
4.6	PEP - PepsiCo, Inc.	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	Dividends,	\$5,001 - \$15,000
4.7	PIPR - Piper Sandler Companies Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
4.8	USB - U.S. Bancorp	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	Dividends,	\$5,001 - \$15,000
4.9	YUM - YUM! Brands, Inc.	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
4.10	MMM - 3M Company	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
4.11	SOLV - Solventum Corporation Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
5	Charles Schwab - IRA Rollover	Retirement Plans IRA	Self			
5.1	SWVXX - Schwab Value Advantage Money Fund	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
5.2	SWGXX - Schwab Government Money Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
6	Minnesota Deferred Compensation Plan	Retirement Plans Deferred	Self			

	Asset	Asset Type	Owner	Value	Income Type	Income
6.1	Empower Retirement (Denver, CO) <i>Type: Money Market Account,</i>	Bank Deposit	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
7	State of Minnesota - Former Employer Retirement Plan	Retirement Plans Defined Contribution Pension Plan	Self			
7.1	Balanced Fund	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
8	Stone Arch Capital III, LP <i>Description: Investment Company (Minneapolis, MN) Filer comment: Although we have requested addl info. from the fund mgr, addl info. is not known or ascertainable; and the spouse has no authority to direct the investments.</i>	Investment Fund Private Equity Fund	Spouse	\$100,001 - \$250,000	None,	None (or less than \$201)
9	Accuitive Medical Ventures, LLC <i>Company: Accuitive Medical Ventures, LLC (Duluth, GA) Description: Investment Company</i>	Business Entity Limited Liability Company (LLC)	Spouse			
9.1	AMV Partners I, LP <i>Company: AMV Partners I, LP (Duluth, GA) Description: Medical Device Company</i>	Business Entity Limited Partnership (LP)	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
10	Surgical Information Sciences <i>Company: Surgical Information Sciences (Alpharetta, CA) Description: Health Management Systems</i>	Corporate Securities Non-Public Stock	Spouse	\$50,001 - \$100,000	None,	None (or less than \$201)
11	Owl Navigation, Inc. <i>Company: Owl Navigation, Inc. (Plymouth, MN) Description: Health Management System</i>	Corporate Securities Non-Public Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
12	Northern Lakes Capital IV, LP <i>Description: Private Equity (Minneapolis, MN) Filer comment: Although we have requested addl info. from the fund mgr, addl info. is not known or ascertainable.</i>	Investment Fund Private Equity Fund	Spouse	\$100,001 - \$250,000	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	04/04/2024	Spouse	NEE	Nextera Energy	Sale (Partial)	\$100,001 - \$250,000	--
2	04/04/2024	Spouse	PODD	Insulet Corporation - Common Stock	Sale (Partial)	\$50,001 - \$100,000	--
3	11/12/2024	Spouse	TCMD	Tactile Systems Technology Inc	Purchase	\$50,001 - \$100,000	Underlying asset of Arch C Smith Revocable Trust U/A DTD 11/23/2015

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	2018	Spouse	Home Equity Line of Credit	-	4.0% (on demand)	\$250,001 - \$500,000	Sunrise Banks, N.A. St. Paul, MN	n/a
2	2020	Joint	Mortgage	0	3.125% (7 year)	\$500,001 - \$1,000,000	Rocket Mortgage by Quicken Loans Detroit, MI	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 2018	State of Minnesota St. Paul, MN	Continuing participation in an employee benefit plan	Defined contribution pension plan that provides service retirement benefits.	n/a
2	Jan 2018	State of Minnesota St. Paul, MN	Continuing participation in an employee benefit plan	Deferred comp plan that provides retirement benefits.	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.

