118th Congress, 2d Session – – – – – – – – – – – – House Document 118–154

FINANCIAL DISCLOSURE REPORT OF MEMBERS OF THE BOARD OF THE OFFICE OF CONGRESSIONAL ETHICS

COMMUNICATION

FROM

THE ACTING CLERK, THE HOUSE OF REPRESENTATIVES

TRANSMITTING

THE ANNUAL COMPILATION OF FINANCIAL DISCLOSURE STATEMENTS FILED WITH THE CLERK OF THE HOUSE OF REPRESENTATIVES BY MEMBERS OF THE BOARD OF THE OFFICE OF CONGRESSIONAL ETHICS

JULY 26, 2024.—Referred to the Committee on Ethics and ordered to be printed

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U.S. GOVERNMENT PUBLISHING OFFICE
49–011 WASHINGTON : 2024

HOUSE OF REPRESENTATIVES,
Washington, DC, July 26, 2024.

Hon. MIKE JOHNSON,
Speaker of the House of Representatives,
Washington, DC.

DEAR MR. SPEAKER: I hereby submit the annual compilation of financial disclosure statements filed with the Clerk of the House of Representatives by members of the board of the Office of Congressional Ethics, pursuant to Clause 3 of House Rule XXVI.

This compilation contains the financial disclosure statements and amendments thereto required to be filed by members of the board of the Office of Congressional Ethics, pursuant to Clause 3 of House Rule XXVI, on or before May 15 of each calendar year after any year in which they perform the duties of that position. The compilation includes reported financial transactions which occurred between January 1, 2023, and December 31, 2023.

House Rule XXVI further provides that the annual compilation of reports filed with the Clerk by members of the board be printed as a House document and made available to the public by August 1 of each year. This compilation is submitted accordingly.

With best wishes, I am

Sincerely,

KEVIN F. MCCUMBER,
Acting Clerk.

Date Received by Office of the Clerk	Page Number

FINANCIAL DISCLOSURE REPORT

Office of Congressional Ethics
United States House of Representatives

Name *(Print last, first, middle initial)* BARNES, MICHAEL D.

Step 1: Read the instructions for Parts I through V on the following pages.

Step 2: For each statement below, check Yes or No to describe your situation.

Statement	Yes	No
I. I have reportable assets or sources of income for myself, my spouse, or my dependent children.	Yes ☑	No ☐
II. I have reportable liabilities (debts) for myself, my spouse, or my dependent children.	Yes ☐	No ☑
III. I have reportable outside positions for myself.	Yes ☐	No ☑
IV. I have reportable agreements or arrangements for myself.	Yes ☐	No ☑
V. I have reportable gifts or travel reimbursements for myself, my spouse, or my dependent children.	Yes ☐	No ☑

Step 3: If you selected Yes for any statement, you must describe the reportable interests that you have in the corresponding Part (I, II, III, IV, or V) of the form.

Step 4: Sign and date the form.

Step 5: Submit the completed form to the Legislative Resource Center, U.S. House of Representatives, B-81 Cannon House Office Building, Washington, DC 20515.

I certify that the statements I have made on this form and all attached statements are true, complete, and correct to the best of my knowledge.

Signature of Member	Date *(mm/dd/yy)*
	5-11-24

OCE Financial Disclosure Form

Name (Print last, first, middle initial)	Page Number
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Part I: Assets and Income

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Assets held for investment or the production of income that ended the reporting period with a value greater than $1,000. In addition, assets from which more than $1,000 in income was received during the reporting period. Reportable assets include, but are not limited to: – Assets such as stocks, bonds, annuities, trust holdings, partnership interests, life insurance, investment real estate, or a privately-held trade or business – Sector mutual funds: those funds invested in a particular industry, business, or location, such as ABC Electronics Fund or XYZ Canada Fund (report the full name of the fund, not just the family fund name) – Holdings of retirement plans, such as 401(k)s or IRAs, investment life insurance, or variable annuities (report each holding unless listed in the Do Not Report section) – Defined benefit pension plans provided by a former employer (include the name of the employer)	• Federal Government retirement benefits • Thrift Savings Plan • Certificates of deposit, savings or checking accounts • Term life insurance • Money market mutual funds and money market accounts • Your personal residence, unless you rent all or part of it out • U.S. Government Treasury bonds, bills, notes, and savings bonds • Diversified mutual funds, such as ABC Equity Value Fund or XYZ Large Capital Fund • Diversified funds within an employee benefit plan • Money owed to you, your spouse, or dependent child by a spouse, parent, sibling, or child

Also Report:	Do Not Report:
• For yourself: (1) all sources of salary, fees, commissions, and other earned income greater than $1,000, (2) honoraria greater than $1,000, and (3) other non-investment income such as scholarships, prizes, and gambling income greater than $1,000 • For your spouse: (1) all sources of salary, fees, commissions, and other earned income greater than $1,000, and (2) honoraria greater than $1,000	• Dependent child's earned income • Veterans' benefits • Federal Government salary • Social Security benefits

Important Definitions

Diversified Mutual Fund – A mutual fund that does not have a stated policy of concentrating its investments in one industry, business, or single country other than the United States.
Sector Mutual Fund – A mutual fund that concentrates its investments in an industry, business, single country other than the United States, or bonds of a single state within the United States.
Diversified Fund within an Employee Benefit Plan – An employee benefit plan fund that has a written policy of varying investments without concentration in one industry, business, or single country other than the United States.
Dependent Child – A son, daughter, stepson or stepdaughter who is either unmarried and under age 21 and living in the filer's house, **or** considered dependent under the U.S. tax code.

Reportable Information – Go to the last page to see examples of how to report assets and income.

Specific stock, bond, sector mutual fund, type/location of real estate, etc. *(Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.)* **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** *(Include brief description.)* **You may** distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	**No longer held**
1 Rental Property in Rockville, MD	☐
2 Rental Property in Bethesda, MD	☐
3 S - Rental Property in Naples, FL	☐
4 Vacation Property in Ocean City, MD	☐

OCE Financial Disclosure Form

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Part I: Assets and Income

Continuation Page

Specific stock, bond, sector mutual fund, type/location of real estate, etc. (*Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.*) **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** (*Include brief description.*) **You may** distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	**No longer held**
1	☐
2 See listings of investments held	☐
3 by me and my wife, JOAN C. POLLITT,	☐
4 at Morgan Stanley, Bernstein,	☐
5 and Naples Trust Co.	☐
6	☐
7 & also receive $10,100.00 per	☐
8 year in retirement income	☐
9 for service on Board of	☐
10 WGL Holdings Corp.	☐
11	☐
12	☐
13	☐
14	☐
15	☐
16	☐
17	☐
18	☐
19	☐
20	☐

Morgan Stanley

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Barnes Positions as of 12 31 2023

Symbol/CUSIP	Security Description
ADBE	ADOBE INC
GOOGL	ALPHABET INC CL A
AMZN	AMAZON COM INC
AXP	AMERICAN EXPRESS CO
AWK	AMERICAN WATER WORKS CO
AAPL	APPLE INC
AZN	ASTRAZENECA PLC ADR
BAC	BANK OF AMERICA CORP
BAC.N	BANK OF AMERICA CO 5.00 SER LL
BEEM	BEAM GLOBAL
BAH	BOOZ ALLEN HAMILTON HLDG CL-A
AVGO	BROADCOM INC
BC	BRUNSWICK CORP
KO	COCA COLA CO
COST	COSTCO WHOLESALE CORP NEW
CMI	CUMMINS INC
DHR	DANAHER CORPORATION
DE	DEERE & CO
DIS	WALT DISNEY CO HLDG CO
XOM	EXXON MOBIL CORP
F	FORD MOTOR CO NEW
HD	HOME DEPOT INC
HON	HONEYWELL INTL INC
JPM	JPMORGAN CHASE & CO
JNJ	JOHNSON & JOHNSON
JPM.K	JPMORGAN CHASE & C 4.55 SER-JJ
JPM.C	JPMORGAN CHASE & CO 6.0% S-EE
LLY	ELI LILLY & CO
LMT	LOCKHEED MARTIN CORP
MMC	MARSH & MCLENNAN COS INC
MA	MASTERCARD INC CL A
MCD	MC DONALDS CORP
MRK	MERCK & CO INC NEW COM
MSFT	MICROSOFT CORP
NEE	NEXTERA ENERGY INC
NEE	NEXTERA ENERGY INC
NKE	NIKE INC B
PEP	PEPSICO INC NC
PG	PROCTER & GAMBLE

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SNA	SNAP-ON INC
TJX	TJX COS INC NEW
TSM	TAIWAN SMCNDCTR MFG CO LTD ADR
TMO	THERMO FISHER SCIENTIFIC
TFC	TRUIST FINL CORP
UNH	UNITEDHEALTH GP INC
V	VISA INC CL A
WEC	WEC ENERGY GROUP INC COM
WSM	WILLIAMS SONOMA
ACN	ACCENTURE PLC IRELAND CL A
TT	TRANE TECHNOLOGIES PLC
IUGXX	INVESCO PREM US GOVT MNY INST
CSVZX	COLUMBIA SELECT LG CAP VAL I
DCCIX	DELAWARE SMALL CAP CORE INST
HLMIX	HARDING LOEVNER INTL EQTY INST
JMGRX	JANUS HENDERSON ENTERPRISE I
SBTYX	WESTERN AST INT TERM MUNI I
NFFFX	AMERICAN NEW WORLD F2
PICYX	PIONEER BOND Y
FUNYX	PIONEER FUNDAMENTAL GROWTH Y
PCBIX	PRINCIPAL MIDCAP INSTL
PIFZX	PGIM SHORT-TERM CORP BOND Z
PRDGX	T ROWE PRICE DIV GR FD
RPMGX	T ROWE PRICE MID CAP GR
TBGVX	TWEEDY BROWNE INTL VALUE FD
PKSFX	VIRTUS KAR SMALL-CAP CORE I
WAAEX	WASATCH SM CAP GRW FD
WMFFX	AMERICAN WA MUTUAL F2
037833AZ3	APPLE INCCoupon 2.50% Mature 02/09/2025(CX12N)
037833BG4	APPLE INCCoupon 3.20% Mature 05/13/2025(CKQ79)
06051GFH7	BANK OF AMERICA CORPCoupon 4.20% Mature 08/26/2024(EZH12)
06051GFL8	BANK OF AMERICA CORPCoupon 4.25% Mature 10/22/2026(EU7G9)
06051GFM6	BANK OF AMERICA CORPCoupon 4.00% Mature 01/22/2025(D87NC)
06051GFP9	BANK OF AMERICA CORPCoupon 3.95% Mature 04/21/2025(C7C7Q)
166764BL3	CHEVRON CORPCoupon 2.95% Mature 05/16/2026(DE0N1)
172967HB0	CITIGROUP INCCoupon 5.50% Mature 09/13/2025(B288J)
25468PDF0	TWDC ENTERPRISES 18 CORPCoupon 3.15% Mature 09/17/2025(D8EJ1)

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30231GAT9	EXXON MOBIL CORPCoupon 3.04% Mature 03/01/2026(CWV60)
46625HJY7	JPMORGAN CHASE & COCoupon 3.88% Mature 09/10/2024(B2QX0)
46625HJZ4	JPMORGAN CHASE & COCoupon 4.13% Mature 12/15/2026(FGA43)
487836BP2	KELLANOVACoupon 3.25% Mature 04/01/2026(D5M9R)
713448CT3	PEPSICO INCCoupon 2.75% Mature 04/30/2025(A4P1Y)
91324PDR0	UNITEDHEALTH GROUP INCCoupon 2.38% Mature 08/15/2024(GR8Z9)
94974BGL8	WELLS FARGO & COCoupon 4.30% Mature 07/22/2027(D56BQ)
912828V80	UNITED STATES TREASURY NOTECoupon 2.25% Mature 01/31/2024(D10C1)
91282CED9	UNITED STATES TREASURY NOTECoupon 1.75% Mature 03/15/2025(A6AR3)
91282CEG2	UNITED STATES TREASURY NOTECoupon 2.25% Mature 03/31/2024(E3YQ1)
91282CER8	UNITED STATES TREASURY NOTECoupon 2.50% Mature 05/31/2024(B829J)
91282CEX5	UNITED STATES TREASURY NOTECoupon 3.00% Mature 06/30/2024(KYP03)
91282CFQ9	UNITED STATES TREASURY NOTECoupon 4.38% Mature 10/31/2024(CUCU2)
91282CGN5	UNITED STATES TREASURY NOTECoupon 4.63% Mature 02/28/2025(EKL12)
91282CGU9	UNITED STATES TREASURY NOTECoupon 3.88% Mature 03/31/2025(E9X3Z)

* This information is being provided at your request and does not replace or supersede your monthly client statement. This information is based upon the market value of your account as of close of business on Dec 31 2023, and is subject to daily market fluctuation.

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Pollitt Positions as of 12 31 2023

Symbol/CUSIP	Security Description
ADBE	ADOBE INC
GOOG	ALPHABET INC CL C
GOOGL	ALPHABET INC CL A
AMZN	AMAZON COM INC
AXP	AMERICAN EXPRESS CO
AWK	AMERICAN WATER WORKS CO
ELV	ELEVANCE HEALTH INC
AAPL	APPLE INC
BAC	BANK OF AMERICA CORP
BAC.N	BANK OF AMERICA CO 5.00 SER LL
BKNG	BOOKING HOLDINGS INC
AVGO	BROADCOM INC
CAT	CATERPILLAR INC
KO	COCA COLA CO
COST	COSTCO WHOLESALE CORP NEW
DHR	DANAHER CORPORATION
DE	DEERE & CO
DIS	WALT DISNEY CO HLDG CO
XOM	EXXON MOBIL CORP
F	FORD MOTOR CO NEW
GPC	GENUINE PARTS CO
HD	HOME DEPOT INC
HON	HONEYWELL INTL INC
JPM	JPMORGAN CHASE & CO
JNJ	JOHNSON & JOHNSON
JPM.K	JPMORGAN CHASE & C 4.55 SER-JJ
LLY	ELI LILLY & CO
LMT	LOCKHEED MARTIN CORP
MMC	MARSH & MCLENNAN COS INC
MAR	MARRIOTT INTL INC NEW CL A
MLM	MARTIN MARIETTA MATERIALS
MA	MASTERCARD INC CL A
MCD	MC DONALDS CORP
MSFT	MICROSOFT CORP
NEE	NEXTERA ENERGY INC
NKE	NIKE INC B
NVDA	NVIDIA CORPORATION
PEP	PEPSICO INC NC

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PG	PROCTER & GAMBLE
SNA	SNAP-ON INC
TJX	TJX COS INC NEW
UNH	UNITEDHEALTH GP INC
V	VISA INC CL A
WEC	WEC ENERGY GROUP INC COM
ACN	ACCENTURE PLC IRELAND CL A
TT	TRANE TECHNOLOGIES PLC
GLD	SPDR GOLD TR GOLD SHS
IUGXX	INVESCO PREM US GOVT MNY INST

*This information is being provided at your request and does not replace or supersede your monthly client statement. This information is based upon the market value of your account as of the close of business on 12 31 2023, and is subject to daily market fluctuation.

Naples Trust Co. Page 9

Joan Pollitt Investment Agency Account Holdings

May 9, 2024

TFDXXI	Blackrock Fed Funds Inst Money Market
GOOG	Google
TMUS	T-Mobile
AZO	Autozone
TJX	TJX Companies
AXP	American Express
CB	Chubb LTD
CBOE	CBOE Holdings
FISV	Fiserv
JPM	JP Morgan Chase
CI	Cigna Corp
ELV	Anthem Inc
MCK	McKesson Corp
MRK	Merck & Co
CAT	Caterpillar Inc
PH	Parker Hannifin Corp
URI	United Rentals Inc
AAPL	Apple Computer Inc
ACN	Accenture PLC
AMD	Advanced Micro Devices Inc
CDW	CDW Corp
CRM	Salesforce
MSFT	Microsoft Corp

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Joan Pollitt IRA

Account Holdings 5/9/2024

TDDXXI	Blackrock Fed Fund Inst Money Market
IJR	I Shares S&P Small Cap 600
IVV	I Shares S&P 500
VEA	Vanguard MSCI EAFE ETF
VUG	Vanguard Growth
VWO	Vanguard MSCI Emerging Markets ETF
VYM	Vanguard High Dividend Yield

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DFIEX	DFA Intl Core Eqty Port
DFSTX	DFA US Small Cap Port
VUG	Vanguard Growth
VYM	Vanguard High Dividend Yield
VUSFX	Vanguard Ultra Short-Term Bond Fund
VWEAX	Vanguard High Yield Corp Adm shs

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AB BERNSTEIN

Holdings

Relationship: POLLITT, JOAN C.
As of May 9, 2024
Reporting Currency: US Dollars

Asset Class	Holding
STOCKS	AB DISCOVERY GRWTH FUND- AD
STOCKS	AB DISCOVERY VALUE-ADV
STOCKS	AB EMERGING MARKETS PORT [3]
STOCKS	AB INTERNATIONAL STRATEGIC EQUITIES PORTFOLIO - ADV CL [3]
STOCKS	AB LARGE CAP GRWTH - ADV [3]
STOCKS	AB SELECT US EQUITY PORT- ADV [3]
STOCKS	AB SMALL CAP CORE PORTFOLIO ADV CL
STOCKS	AB VALUE FUND- ADV [3]
CASH BALANCES	ABFIS- GOVT MONEY MARKET CLASS 1
STOCKS	ADOBE INC
BONDS	ALLEGHENY CNTY PA HOSP DEV AUT 5.000% DUE 04/01/2025
STOCKS	ALPHABET INC-CL C
STOCKS	ALTRIA GROUP INC
STOCKS	AMAZON.COM INC
STOCKS	AMERICAN ELECTRIC POWER
STOCKS	AMERICAN TOWER CORP
STOCKS	APPLE INC
STOCKS	ATI INC
STOCKS	AUTOZONE INC
STOCKS	BAKER HUGHES CO
STOCKS	BANK OF AMERICA CORP
STOCKS	BOOZ ALLEN HAMILTON HOLDINGS
STOCKS	BROADCOM INC
BONDS	CALIFORNIA ST PUBLIC WKS BRD L 5.000% DUE 04/01/2043
STOCKS	CDW CORP/DE
BONDS	CENTRL FL EXPRESSWAY AUTH SR L 5.000% DUE 07/01/2043
STOCKS	CHEVRON CORP
BONDS	CITIZENS PROPERTY INSURANCE CO 5.000% DUE 06/01/2025
BONDS	CLARK CNTY NV SCH DIST 5.000% DUE 06/15/2024
BONDS	CLARK CNTY NV SCH DIST 5.000% DUE 06/15/2025
STOCKS	COCA-COLA CO/THE
STOCKS	COMCAST CORP-CLASS A
STOCKS	CONSTELLATION BRANDS INC-A
STOCKS	CORTEVA INC
STOCKS	COSTCO WHOLESALE CORP
STOCKS	CSX CORP
STOCKS	DANAHER CORP
BONDS	DENVER CO CONVENTION CENTER HO 5.000% DUE 12/01/2024

BERNSTEIN

Holdings

Relationship: POLLITT, JOAN C.
As of May 9, 2024
Reporting Currency: US Dollars

STOCKS	EATON CORP PLC
STOCKS	EDWARDS LIFESCIENCES CORP
STOCKS	ELEVANCE HEALTH INC
STOCKS	EOG RESOURCES INC
STOCKS	GEN DIGITAL INC
STOCKS	GOLDMAN SACHS GROUP INC
BONDS	GREAT LAKES MI WTR AUTH WTR SP 5.000% DUE 07/01/2032
BONDS	GREAT LAKES MI WTR AUTH WTR SP 5.250% DUE 07/01/2039
BONDS	HARRIS CNTY TX INDL DEV CORP 4.050% DUE 11/01/2050
STOCKS	HCA HEALTHCARE INC
STOCKS	HOME DEPOT INC
BONDS	HOUSTON TX 5.000% DUE 03/01/2029
STOCKS	HYATT HOTELS CORP - CL A
STOCKS	ILLUMINA INC
STOCKS	IQVIA HOLDINGS INC
BONDS	JEA FL ELEC SYS REVENUE 5.000% DUE 10/01/2027
STOCKS	JOHNSON & JOHNSON
BONDS	KENTUCKY ST PUBLIC ENERGY AUTH 4.000% DUE 02/01/2050
STOCKS	KLA CORP
BONDS	LAKE CNTY FL SCH BRD COPS 5.000% DUE 06/01/2029
BONDS	LAKEWOOD RANCH FL STEWARDSHIP 2.000% DUE 05/01/2029
STOCKS	LINDE PLC
BONDS	LOWER COLORADO RIVER TX AUTH R 5.000% DUE 05/15/2033
STOCKS	LPL FINANCIAL HOLDINGS INC
STOCKS	LYONDELLBASELL INDU-CL A
BONDS	MAIN STREET NATURAL GAS INC GA 5.000% DUE 12/01/2052
BONDS	MARYLAND ST TRANSPRTN AUTH PAS 5.000% DUE 06/01/2032
BONDS	MASSACHUSETTS ST 5.000% DUE 08/01/2042
BONDS	MASSACHUSETTS ST DEV FIN AGY R 5.000% DUE 10/01/2040
STOCKS	MASTEC INC
STOCKS	MEDTRONIC PLC
BONDS	MET GOVT NASHVILLE & DAVIDSONC 5.000% DUE 07/01/2030
BONDS	MET TRANSPRTN AUTH NY REVENUE 5.000% DUE 11/15/2029
BONDS	MET TRANSPRTN AUTH NY REVENUE 5.000% DUE 11/15/2032
BONDS	MET WASHINGTON DC ARPTS AUTH A 5.000% DUE 10/01/2027
STOCKS	META PLATFORMS INC-CLASS A
BONDS	MIAMI-DADE CNTY FL AVIATION RE 5.000% DUE 10/01/2038
BONDS	MIAMI-DADE CNTY FL EXPRESSWAY 5.000% DUE 07/01/2031
BONDS	MIAMI-DADE CNTY FL SEAPORT REV 4.000% DUE 10/01/2041
BONDS	MIAMI-DADE CNTY FL SEAPORT REV 5.000% DUE 10/01/2041

BERNSTEIN

Holdings

Relationship: POLLITT, JOAN C.
As of May 9, 2024
Reporting Currency: US Dollars

BONDS	MICHIGAN ST STRATEGIC FUND LTD 5.000% DUE 06/30/2025
STOCKS	MICROSOFT CORP
BONDS	MINNEAPOLIS-SAINT PAUL MN MET 4.250% DUE 01/01/2041
BONDS	MINNESOTA ST 5.000% DUE 08/01/2025
BONDS	NEVADA ST HIGHWAY IMPT REVENUE 5.000% DUE 12/01/2027
BONDS	NEW JERSEY ST ECON DEV AUTH SP 5.000% DUE 10/01/2037
BONDS	NEW JERSEY ST TRANSPRTN TRUST 5.000% DUE 06/15/2027
BONDS	NEW JERSEY ST TRANSPRTN TRUST 5.000% DUE 12/15/2024
BONDS	NEW JERSEY ST TRANSPRTN TRUST 5.250% DUE 06/15/2041
BONDS	NEW JERSEY ST TURNPIKE AUTH TU 5.000% DUE 01/01/2029
BONDS	NEW YORK NY 5.000% DUE 03/01/2044
BONDS	NEW YORK ST TRANSPRTN DEV CORP 4.000% DUE 12/01/2042
STOCKS	NEXTERA ENERGY INC
STOCKS	NIKE INC -CL B
STOCKS	NVIDIA CORP
STOCKS	NXP SEMICONDUCTORS NV
BONDS	OHIO ST AIR QUALITY DEV AUTH 4.250% DUE 11/01/2039
STOCKS	ORACLE CORP
STOCKS	OTIS WORLDWIDE CORP
STOCKS	PACCAR INC
STOCKS	PAYPAL HOLDINGS INC
BONDS	PHOENIX AZ 4.000% DUE 07/01/2026
STOCKS	PNC FINANCIAL SERVICES GROUP
STOCKS	PROCTER & GAMBLE CO/THE
STOCKS	PROGRESSIVE CORP
STOCKS	PROLOGIS INC
STOCKS	QUALCOMM INC
STOCKS	REGENERON PHARMACEUTICALS
STOCKS	RESTAURANT BRANDS INTERN
STOCKS	ROCHE HOLDINGS LTD-SPONS ADR
STOCKS	SCHWAB (CHARLES) CORP
STOCKS	SENSATA TECHNOLOGIES HOLDING
STOCKS	SERVICENOW INC
BONDS	SOUTH CAROLINA ST PORTS AUTH P 5.000% DUE 07/01/2032
BONDS	SOUTH CAROLINA ST PORTS AUTH P 5.000% DUE 07/01/2034
BONDS	SOUTH CAROLINA ST PUBLIC SVC A 5.000% DUE 12/01/2029
STOCKS	STELLANTIS NV
BONDS	TAMPA FL HOSP REVENUE 5.000% DUE 07/01/2040
BONDS	TENNESSEE ST ENERGY ACQUISITIO 4.000% DUE 11/01/2049
BONDS	TEXAS ST MUNI GAS ACQUISITION& 5.500% DUE 01/01/2054

BERNSTEIN

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Holdings

Relationship: POLLITT, JOAN C.
As of May 9, 2024
Reporting Currency: US Dollars

BONDS	TEXAS ST TRANSPRTN COMMISSION 5.000% DUE 08/15/2029
STOCKS	THERMO FISHER SCIENTIFIC INC
STOCKS	T-MOBILE US INC
BONDS	TRIBOROUGH NY BRIDGE & TUNNEL 5.000% DUE 08/15/2024
CASH BALANCES	U.S. $ CASH BALANCE
STOCKS	UNITEDHEALTH GROUP INC
BONDS	UNIV HOSPS & CLINICS AUTH WI 5.000% DUE 04/01/2031
BONDS	US TREASURY 4.500% DUE 11/15/2033
STOCKS	VERTEX PHARMACEUTICALS INC
BONDS	VIRGINIA ST SMALL BUSINESS FIN 4.000% DUE 07/01/2032
BONDS	VIRGINIA ST SMALL BUSINESS FIN 5.000% DUE 07/01/2034
BONDS	VIRGINIA ST SMALL BUSINESS FIN 5.000% DUE 10/01/2042
BONDS	VIRGINIA ST SMALL BUSINESS FIN 5.000% DUE 12/31/2040
STOCKS	VISA INC-CLASS A SHARES
STOCKS	WALMART INC
STOCKS	WALT DISNEY CO/THE
BONDS	WASHINGTON MD SUBURBAN SAN DIS 4.000% DUE 06/01/2045
STOCKS	WATERS CORP
STOCKS	WELLS FARGO & CO
STOCKS	WESTERN DIGITAL CORP
STOCKS	WILLIS TOWERS WATSON PLC
STOCKS	WORKDAY INC-CLASS A
STOCKS	ZOETIS INC

OCE Financial Disclosure Form

Name (*Print last, first, middle initial*)	Page Number
BARNES, MICHAEL D.	16

Part II: Liabilities

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Liabilities that exceeded $10,000 during the reporting period	• Any liability, such as a mortgage, a student loan, or a credit card account, from a financial institution or business entity granted on terms made available to the general public • Loans secured by automobiles, household furniture, or appliances, unless the loan exceeds the purchase price of the item it secures • Liabilities that you owe to your spouse or to the parent, sibling, or child of you, your spouse, or your dependent child

Reportable Information – Go to the last page to see examples of how to report liabilities.

Name of creditor (*include city and state where creditor is located*)	Type of liability (*personal loan, margin account, etc.*)
1 None	
2	
3	
4	
5	
6	
7	
8	
9	
10	

OCE Financial Disclosure Form

Name (Print last, first, middle initial)	Page Number
BARNES, MICHAEL D	17

Part III: Outside Positions

Report for Yourself:	Do Not Report:
• All positions outside the U.S. Government held at any time during the reporting period, whether or not you were compensated and whether or not you currently hold that position. Positions include an officer, director, employee, trustee, general partner, proprietor, representative, executor, or consultant of any of the following: – Corporation, partnership, trust, or other business entity – Non-profit or volunteer organization – Educational institution – State or Local Government	• Any position with a – Religious entity – Social entity – Fraternal entity – Political entity • Any position held by your spouse or dependent child • Any position that you hold as part of your official duties

Reportable Information – Go to the last page to see examples of how to report outside positions.

Organization *(include city and state where organization is located)*	Type of organization	Position	No longer held
1 None			☐
2			☐
3			☐
4			☐
5			☐
6			☐
7			☐
8			☐
9			☐
10			☐

OCE Financial Disclosure Form

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BARNES, MICHAEL D.	18

Part IV: Agreements or Arrangements

Report Your Agreements or Arrangements for:	Do Not Report:
• Continuing participation in an employee pension or benefit plan maintained by a current or former employer • A leave of absence • Future employment, including date you accepted employment offer • Continuation of payment by a current or former employer (including severance payments)	• Any agreement or arrangement related to your employment by the Federal Government • Spouse's and dependent child's agreements or arrangements • Continuing participation in a defined contribution plan, such as a 401(k) plan, to which a former employer is no longer making contributions

Reportable Information – Go to the last page to see examples of how to report agreements and arrangements.

Entity with which you have an agreement or arrangement *(include city and state where entity is located)*	**Terms of Agreement or Arrangement**
1 None	
2	
3	
4	
5	
6	
7	
8	
9	
10	

OCE Financial Disclosure Form

Name (Print last, first, middle initial)	Page Number
BARNES, MICHAEL D.	19

Part V: Gifts and Travel Reimbursements

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Any gifts or travel reimbursements (items such as lodging, transportation, and food) totaling more than $480* from any one source during the reporting period; include where you traveled, the purpose, and date(s) of the trip for travel gifts and reimbursements * If you received more than one gift from one source: 1. Determine the value of each item you received from that source 2. Ignore each item valued at $192 or less 3. Add the value of those items valued at more than $192; if the total is more than $480, then you must list those items on this form	• Anything received from relatives, the U.S. Government, D.C., state, or local governments • Bequests and other forms of inheritance • Gifts and travel reimbursements given to your office in connection with your official travel • Gifts of hospitality (food, lodging, entertainment) at the donor's residence or personal premises • Anything received by your spouse or dependent child totally independent of their relationship to you

Reportable Information – Go to the last page to see examples of how to report gifts and travel reimbursements.

Source	Description
1 None	
2	
3	

EXAMPLES

Part I: Assets and Income

Specific stock, bond, sector mutual fund, type/location of real estate, etc. *(Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.)* **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** *(Include brief description.)* **You may** distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	**No longer held**
	☐
	☐
	☐
	☐
	☐
	☐
	☐
	☐

Part II: Liabilities

Name of creditor *(city and state)*	**Type of liability** *(personal loan, margin account, etc.)*

Part III: Outside Positions

Organization *(city and state)*	**Type of organization**	**Position**	**No longer held**
	Educational institution	Professor	☐
	Family Trust	Trustee	☐
	Non-profit environmental organization	Member, Board of Directors	☐

Part IV: Agreements or Arrangements

Entity with which you have an agreement or arrangement *(include city and state where entity is located)*	**Terms of Agreement or Arrangement**

Part V: Gifts and Travel Reimbursements

Source	**Description**

Date Received by Office of the Clerk		Page Number 1

FINANCIAL DISCLOSURE REPORT
Office of Congressional Ethics
United States House of Representatives

Name (*Print last, first, middle initial*)	Haas, Karen L.

Step 1: Read the instructions for Parts I through V on the following pages.

Step 2: For each statement below, check Yes or No to describe your situation.

I. I have reportable assets or sources of income for myself, my spouse, or my dependent children.	**Yes** ☐	**No** ☑
II. I have reportable liabilities (debts) for myself, my spouse, or my dependent children.	**Yes** ☐	**No** ☑
III. I have reportable outside positions for myself.	**Yes** ☐	**No** ☑
IV. I have reportable agreements or arrangements for myself.	**Yes** ☐	**No** ☑
V. I have reportable gifts or travel reimbursements for myself, my spouse, or my dependent children.	**Yes** ☐	**No** ☑

Step 3: If you selected Yes for any statement, you must describe the reportable interests that you have in the corresponding Part (I, II, III, IV, or V) of the form.

Step 4: Sign and date the form.

Step 5: Submit the completed form to the Legislative Resource Center, U.S. House of Representatives, B-81 Cannon House Office Building, Washington, DC 20515.

I certify that the statements I have made on this form and all attached statements are true, complete, and correct to the best of my knowledge.

Signature of Member	Date (*mm/dd/yy*)
	05/14/24

Date Received by Office of the Clerk

Page Number
1

FINANCIAL DISCLOSURE REPORT
Office of Congressional Ethics
United States House of Representatives

Name (*Print last, first, middle initial*)
Luther, William P.

Step 1: Read the instructions for Parts I through V on the following pages.

Step 2: For <u>each</u> statement below, check Yes or No to describe your situation.

I. I have reportable assets or sources of income for myself, my spouse, or my dependent children.	**Yes ☒**	**No ☐**
II. I have reportable liabilities (debts) for myself, my spouse, or my dependent children.	**Yes ☐**	**No ☒**
III. I have reportable outside positions for myself.	**Yes ☒**	**No ☐**
IV. I have reportable agreements or arrangements for myself.	**Yes ☐**	**No ☒**
V. I have reportable gifts or travel reimbursements for myself, my spouse, or my dependent children.	**Yes ☐**	**No ☒**

Step 3: If you selected Yes for <u>any</u> statement, you must describe the reportable interests that you have in the corresponding Part (I, II, III, IV, or V) of the form.

Step 4: Sign and date the form.

Step 5: Submit the completed form to the Legislative Resource Center, U.S. House of Representatives, B-81 Cannon House Office Building, Washington, DC 20515.

I certify that the statements I have made on this form and all attached statements are true, complete, and correct to the best of my knowledge.

Signature of Member	**Date (*mm/dd/yy*)**
	05/09/2024

OCE Financial Disclosure Form

Name (*Print last, first, middle initial*)	Page Number
Luther, William P.	2

Part I: Assets and Income

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Assets held for investment or the production of income that ended the reporting period with a value greater than $1,000. In addition, assets from which more than $1,000 in income was received during the reporting period. Reportable assets include, but are not limited to: – Assets such as stocks, bonds, annuities, trust holdings, partnership interests, life insurance, investment real estate, or a privately-held trade or business – Sector mutual funds: those funds invested in a particular industry, business, or location, such as ABC Electronics Fund or XYZ Canada Fund (report the full name of the fund, not just the family fund name) – Holdings of retirement plans, such as 401(k)s or IRAs, investment life insurance, or variable annuities (report each holding unless listed in the Do Not Report section) – Defined benefit pension plans provided by a former employer (include the name of the employer)	• Federal Government retirement benefits • Thrift Savings Plan • Certificates of deposit, savings or checking accounts • Term life insurance • Money market mutual funds and money market accounts • Your personal residence, unless you rent all or part of it out • U.S. Government Treasury bonds, bills, notes, and savings bonds • Diversified mutual funds, such as ABC Equity Value Fund or XYZ Large Capital Fund • Diversified funds within an employee benefit plan • Money owed to you, your spouse, or dependent child by a spouse, parent, sibling, or child

Also Report:	Do Not Report:
• For yourself: (1) all sources of salary, fees, commissions, and other earned income greater than $1,000, (2) honoraria greater than $1,000, and (3) other non-investment income such as scholarships, prizes, and gambling income greater than $1,000 • For your spouse: (1) all sources of salary, fees, commissions, and other earned income greater than $1,000, and (2) honoraria greater than $1,000	• Dependent child's earned income • Veterans' benefits • Federal Government salary • Social Security benefits

Important Definitions

Diversified Mutual Fund – A mutual fund that does not have a stated policy of concentrating its investments in one industry, business, or single country other than the United States.
Sector Mutual Fund – A mutual fund that concentrates its investments in an industry, business, single country other than the United States, or bonds of a single state within the United States.
Diversified Fund within an Employee Benefit Plan – An employee benefit plan fund that has a written policy of varying investments without concentration in one industry, business, or single country other than the United States.
Dependent Child – A son, daughter, stepson or stepdaughter who is either unmarried and under age 21 and living in the filer's house, or considered dependent under the U.S. tax code.

Reportable Information – Go to the last page to see examples of how to report assets and income.

Specific stock, bond, sector mutual fund, type/location of real estate, etc. (*Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.*) **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** (*Include brief description.*) **You may** distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	**No longer held**
[1] Assets and investment income listed on Attachment A from RBC.	☐
[2] Fees from Luther & Heckt PLLP, Luther Law Office and Luther Consulting LLC, 601 Carlson Parkway, Suite 1050, Minnetonka MN 55305.	☐
[3] Otter Tail Lake Condominium, 28449 Balmoral Drive, Battle Lake MN 56515.	☐
[4] Minnesota legislative pensions for self and as beneficiary of deceased spouse Darlene J. Luther.	☐

OCE Financial Disclosure Form

Name *(Print last, first, middle initial)* Luther, William P.	Page Number 3

Part I: Assets and Income

Continuation Page

Specific stock, bond, sector mutual fund, type/location of real estate, etc. *(Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.)* **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** *(Include brief description.)* You may distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	**No longer held**
1 Darlene J. Luther Trust 6/1/88 (See attachment A).	☐
2 Spouse, Real Estate, 50 percent owner of Seascape Residence, Cat Cay, Bahamas.	☐
3 Spouse, assets and investment income listed on Attachment B from RBC and Attachment C from Ameriprise.	☐
4 Spouse, investor and officer/president of Fourth Principle, LLC, Plymouth MN.	☐
5 Spouse, investor in Identify Sensors Biologics Corp., Cleveland OH.	☐
6 Spouse, investor in 4757 Hiawatha Group, LLC, Minneapolis MN.	☐
7 Spouse, investor in 200 12th St. RW, LLC, Minneapolis MN.	☐
8 Spouse, loan to JR Broadcasting LLC, Eden Prairie MN.	☐
9 Spouse, investor in Identify Sensors Fresh Foods, Cleveland OH.	☐
10 Spouse, investor in Sota Shine Maple Grove, LLC, Maple Grove MN.	☐
11	☐
12	☐
13	☐
14	☐
15	☐
16	☐
17	☐
18	☐
19	☐
20	☐

OCE Financial Disclosure Form

Name (*Print last, first, middle initial*)	Page Number
Luther, William P.	4

Part III: Outside Positions

Report for Yourself:	Do Not Report:
• All positions outside the U.S. Government held at any time during the reporting period, whether or not you were compensated and whether or not you currently hold that position. Positions include an officer, director, employee, trustee, general partner, proprietor, representative, executor, or consultant of any of the following: - Corporation, partnership, trust, or other business entity - Non-profit or volunteer organization - Educational institution - State or Local Government	• Any position with a - Religious entity - Social entity - Fraternal entity - Political entity • Any position held by your spouse or dependent child • Any position that you hold as part of your official duties

Reportable Information – Go to the last page to see examples of how to report outside positions.

Organization *(include city and state where organization is located)*	Type of organization	Position	No longer held
1 Balmoral Estate Owners Association	A MN Non-Profit Condo Owners Association	Board Member, Vice President (VP 6/18/23 to present)	☐
2 Alexander W. Luther Special Needs Trust 5/30/13	Trust for Down Syndrome Son	Trustee	☐
3 Darlene J. Luther Trust 6/1/88	Trust of Deceased Former Spouse	Trustee	☐
4			☐
5			☐
6			☐
7			☐
8			☐
9			☐
10			☐

WPL – OCE– Attachment A

William Luther Brokerage Account
Stock and Bond Holdings as of 12/31/23

ASSET	TICKER	TYPE
***ASML HOLDING N V	ASML	STOCK
COSTCO WHOLESALE CORP-NEW	COST	STOCK
DEERE & CO	DE	STOCK
NORTHERN OIL & GAS INC	NOG	STOCK
PFIZER INC	PFE	STOCK
NVIDIA CORP	NVDA	STOCK

William Luther IRA
Stock and Bond Holdings as of 12/31/23

ASSET	TICKER	TYPE
AMAZON.COM INC	AMZN	STOCK
AMERICAN TOWER CORPORATION	AMT	STOCK
**ALGER WEATHERBIE SPECIALIZED	ASMZX	STOCK
ABBVIE INC	ABBV	STOCK
ALPHABET INC	GOOGL	STOCK
ALPHABET INC	GOOG	STOCK
**ALGER FDS	AFOZX	STOCK
AMGEN INC	AMGN	STOCK
APPLE INC	AAPL	STOCK
BERKSHIRE HATHAWAY INC DEL	BRKB	STOCK
COSTCO WHOLESALE CORP-NEW	COST	STOCK
DELTA AIR LINES INC DEL	DAL	STOCK
HOME DEPOT INC	HD	STOCK
LULULEMON ATHLETICA INC	LULU	STOCK
MICROSOFT CORP	MSFT	STOCK
MODERNA	MRNA	STOCK
NVIDIA CORP	NVDA	STOCK
NEXTERA ENERGY INC	NEE	STOCK
STRYKER CORP	SYK	STOCK
TESLA INC	TSLA	STOCK
VAIL RESORTS INC	MTN	STOCK
VISA INC	V	STOCK

William Luther IRA- Sales (No Longer Held)
Stock and Bond Holdings No Longer Held as of 12/31/23 – Sold in 2023

ASSET	TICKER	TYPE
DOCUSIGN INC	DOCU	STOCK
SALESFORCE INC	CRM	STOCK
WILLIAMS SONOMA INC	WSM	STOCK

Darlene J Luther Trust
Stock and Bond Holdings as of 12/31/23

ASSET	TICKER	TYPE
**FIDELITY ADVISOR FOCUS FUNDS	FACDX	STOCK
**PARNASSUS INCOME TR	PRBLX	STOCK
ROBO GLOBAL ROBOTICS AND	ROBO	STOCK

WPL – OCE– Attachment B

Janet Robert Trust
Stock and Bond Holdings as of 12/31/23

ASSET	TICKER	TYPE
MINNEAPOLIS MINN HEALTH CARE		BOND
MINNESOTA ST HSG FIN AGY ST		BOND
ABBVIE INC	ABBV	STOCK
AMGEN INC	AMGN	STOCK
CATERPILLAR INC	CAT	STOCK
***COCA-COLA FEMSA SAB DE CV	KOF	STOCK
DUKE ENERGY CORPORATION	DUK	STOCK
DOW INC	DOW	STOCK
DEERE & CO	DE	STOCK
WALT DISNEY CO	DIS	STOCK
GE AEROSPACE	GE	STOCK
GE HEALTHCARE TECHNOLOGIES INC	GEHC	STOCK
GE VERNOVA LLC	GEV	STOCK
GENERAL MILLS INC	GIS	STOCK
GRACO INC	GGG	STOCK
HONEYWELL INTL INC	HON	STOCK
HOME DEPOT INC	HD	STOCK
INTERNATIONAL BUSINESS	IBM	STOCK
MEDICAL PROPERTIES TRUST INC	MPW	STOCK
MCDONALDS CORP	MCD	STOCK
MICROSOFT CORP	MSFT	STOCK
NVIDIA CORP	NVDA	STOCK
NEXTERA ENERGY INC	NEE	STOCK
***PENTAIR PLC	PNR	STOCK
PACCAR INC	PCAR	STOCK
PEPSICO INC	PEP	STOCK
PROCTER & GAMBLE CO	PG	STOCK
SIMON PROPERTY GROUP INC	SPG	STOCK
***SPROTT PHYSICAL GOLD TR	PHYS	STOCK
STARBUCKS CORP	SBUX	STOCK
***TORONTO-DOMINION BANK	TD	STOCK
UNITED PARCEL SVC INC	UPS	STOCK
UNITEDHEALTH GROUP INC	UNH	STOCK
VISA INC	V	STOCK
WALGREEN BOOTS ALLIANCE INC	WBA	STOCK

Janet Robert Trust
Stock and Bond Holdings No Longer Held as of 12/31/23 – Sold in 2023

ASSET	TICKER	TYPE
WESTERN MINN MUN PWR AGY MINN		BOND
MINNEAPOLIS & ST PAUL MINN		BOND
JOHNSON & JOHNSON	JNJ	STOCK
NIKE INC	NKE	STOCK
NORFOLK SOUTHERN CORP	NSC	STOCK
TESLA INC	TSLA	STOCK

JMR 2021 Irrevocable Trust
Stock and Bond Holdings as of 12/31/23

ASSET	TICKER	TYPE
AMAZON.COM INC	AMZN	STOCK
***ASTRAZENECA PLC	AZN	STOCK
ABBOTT LABORATORIES	ABT	STOCK
AMERICAN TOWER CORPORATION	AMT	STOCK
**ALGER SMALL CAP FOCUS FUND	AGOZX	STOCK
***ASML HOLDING N V	ASML	STOCK
ALPHABET INC	GOOGL	STOCK
ALPHABET INC	GOOG	STOCK
**ALGER FDS	AFOZX	STOCK
AMGEN INC	AMGN	STOCK
APPLE INC	AAPL	STOCK
BERKSHIRE HATHAWAY INC DEL	BRKB	STOCK
COSTCO WHOLESALE CORP-NEW	COST	STOCK
CATERPILLAR INC	CAT	STOCK
***COCA-COLA FEMSA SAB DE CV	KOF	STOCK
DOLLAR GENERAL CORPORATION	DG	STOCK
DOW INC	DOW	STOCK
DEERE & CO	DE	STOCK
WALT DISNEY CO	DIS	STOCK
META PLATFORMS INC	META	STOCK
HONEYWELL INTL INC	HON	STOCK
ISHARES TR	IBB	STOCK
KEYSIGHT TECHNOLOGIES INC	KEYS	STOCK
LAM RESEARCH CORP	LRCX	STOCK
METLIFE INC	MET	STOCK
MEDICAL PROPERTIES TRUST INC	MPW	STOCK
MERCADOLIBRE INC	MELI	STOCK
MODERNA INC	MRNA	STOCK
MCDONALDS CORP	MCD	STOCK
NVIDIA CORP	NVDA	STOCK
NETFLIX INC	NFLX	STOCK
NORFOLK SOUTHERN CORP	NSC	STOCK
SALESFORCE INC	CRM	STOCK
***TAIWAN SEMICONDUCTOR MFG CO	TSM	STOCK
TARGET CORP	TGT	STOCK
TESLA INC	TSLA	STOCK

T MOBILE US INC	TMUS	STOCK
***TORONTO-DOMINION BANK	TD	STOCK
UNITEDHEALTH GROUP INC	UNH	STOCK
VISA INC	V	STOCK

WPL—OCE—Attachment C
Janet Robert Trust
Stock and Bond Holdings as of 12/31/23

ASSET	TICKER	TYPE
BLUE EARTH MN SER A DB BAM B/E B/Q		BOND
BRAINERD MN INDPT SCH DIST 181 BLDG SER A B/E CR ENH		BOND
CLARK CNTY NV SCH DIST BLDG SER B BAM B/E		BOND
CLINTONDALE MI CMNTY SCHS RFDG QSBLF B/E		BOND
COOK CNTY IL TWP HIGH SCH DIST 220 BURBANK REAVIS BAM B/E PTC		BOND
DECATUR IN SWR REV WKS RFDG BAM B/E B/Q		BOND
DEER RVR MN SER B DB B/E CR ENH PG		BOND
DULUTH MN INDPT SCH DIST 709 RFDG B B/E OID @99.113 3.09%		BOND
EAST GRAND FORKS MN INDPT SCH DIST 595 SCH BLDG SER A B/E		BOND
FOUR CORNERS CNTY MT WTR & SWR DIST REV RFDG SPL ASSMT SER A AGM B/E		BOND
GREENVILLE MI PUB SCHS BLDG SITE RFDG QSBLF B/E		BOND
HENNEPIN CNTY MN SER A B/E PTC		BOND
INTERMEDIATE SCH DIST 287 MN CTF PARTN RFDG SER A REV B/E PTC		BOND
LAKEVIEW INDPT SCH DIST 2167 MN SCH BLDG SER A B/E B/Q		BOND
LAKEVIEW MN INDPT SCH DIST 2167 FACS MAINT BLDG SER A B/E B/Q		BOND
MANKATO MN INDPT SCH DIST 77 CTF PARTN AREA PUB SCH SER A REV B/E		BOND
MANKATO MN INDPT SCH DIST 77 CTF PARTN AREA PUB SER A REV B/E		BOND
MARYLAND ST CMNTY DEV ADMIN DEPT HSG & CMNTY DEV RESDNTL REV A B/E		BOND
MC LENNAN CNTY TX VENUE PJ RFDG SER A REV AGM B/E		BOND
MINNEAPOLIS & ST PAUL MN HSG & REDEV AUTH HC REV RFDG ALLINA A B/E PTC		BOND
MINNESOTA ST HSG FIN AGY RES HSG FIN B REV B/E		BOND
MINNESOTA ST HSG FIN AGY RES SER I REV B/E		BOND
MONTICELLO MN TAX ABATEMT SER A DB B/E B/Q		BOND
NORTH MANKATO MN SER A DB B/E		BOND
OAKRIDGE MI PUB SCH SCH BLDG & SITE QSBLF B/E PTC		BOND
PALMER TWP PA SER D B/E		BOND
PRINCETON MN PUB UTILS COMMN ELEC SER A REV AGM B/E B/Q		BOND
PUBLIC FIN AUTH WI STDNT HSG REV BDS APPALACHIAN ST UNIV PJ SER A AGM B/E		BOND
RAMSEY WA METRO WTRSHED DIST MN DRAIN SER A B/E B/Q		BOND
ROCHESTER MN HC FACS RFDG MAYO CLINIC SER B REV B/E		BOND
ROCKFORD MN INDPT SCH DIST 883 BLDG RFDG SER B B/E		BOND
SHAKOPEE MN INDPT SCH DIST 720 FAC MAINT SER C B/E CAB @92.296 1.3%		BOND
SOUTH JERSEY TRANSN AUTH NJ TRANSN SYS REV RFDG A AGM B/E		BOND
SPRINGFIELD MN INDPT SCH DIST 085 BLDG SER A B/E CR ENH PG		BOND
ST LOUIS MO MUN LIBR DIST CTF PARTN RFDG REV BAM B/E PTC		BOND
ST PAUL MN HSG & REDEV AUTH HC FACS REV RFDG HLTHPARTNERS OBLIG A B/E		BOND

TENNESSEE HSG DEV AGY RES FIN PG REV SER 1A B/E		BOND
TRAVIS CNTY TX MUD 18 BAM B/E B/Q		BOND
TROY PA AREA SCH DIST BAM B/E BRADFORD CNTY ST INTRCPT		BOND
VIRIDIAN MUN MGMT DIST TX RD IMPT DB BAM B/E		BOND
WILLOUGHBY EASTLAKE OH CITY SCH DIST CTF PARTN REV RFDG BAM B/E B/Q PTC		BOND
APPLE INC	AAPL	STOCK
ABBVIE INC	ABBV	STOCK
ABM INDUSTRIES INC	ABM	STOCK
ABBOTT LABORATORIES	ABT	STOCK
ACCENTURE PLC IRELAND CL A NEW	ACN	STOCK
ADOBE INC	ADBE	STOCK
AUTOMATIC DATA PROCESSING INC	ADP	STOCK
AUTODESK INC	ADSK	STOCK
FEDL AGRICULTURAL MORTGAGE CL C	AGM	STOCK
AVANGRID INC	AGR	STOCK
ARTHUR J GALLAGHER & COMPANY	AJG	STOCK
AIR LEASE CORP CL A	AL	STOCK
ALCON INC	ALC	STOCK
ALLEGRO MICROSYSTEMS INC	ALGM	STOCK
ALLISON TRANSMISSION HLDGS INC	ALSN	STOCK
AMGEN INC	AMGN	STOCK
AMN HEALTHCARE SERVICES INC	AMN	STOCK
AMAZON.COM INC	AMZN	STOCK
AON PLC CL A	AON	STOCK
A O SMITH	AOS	STOCK
APTIV PLC	APTV	STOCK
ASML HOLDING NV NY REGISTRY SHS NEW 2012	ASML	STOCK
APTARGROUP INC	ATR	STOCK
AZENTA INC	AZTA	STOCK
BALL CORP	BALL	STOCK
BRUNSWICK CORP	BC	STOCK
BRIGHT HORIZONS FAMILY SOLUTIONS INC	BFAM	STOCK
SPDR BLOOMBERG 1-3 MONTH T-BILL ETF NEW	BIL	STOCK
BROOKFIELD INFRASTRUCTURE CORP SUB VTG SHS CL A	BIPC	STOCK
BJS WHOLESALE CLUB HOLDINGS INC	BJ	STOCK
BLACKROCK INC	BLK	STOCK
BURLINGTON STORES INC	BURL	STOCK
BWX TECHNOLOGIES INC	BWXT	STOCK
CABLE ONE INC	CABO	STOCK
CASEYS GENL STORES INC	CASY	STOCK
CABOT CORP	CBT	STOCK
CROWN CASTLE INC	CCI	STOCK
COGENT COMMUNICATIONS HOLDINGS INC	CCOI	STOCK

CHEMED CORP NEW	CHE	STOCK
CHORD ENERGY CORP NEW	CHRD	STOCK
CIVITAS RESOURCES INC	CIVI	STOCK
COHEN & STEERS INC	CNS	STOCK
CONCENTRIX CORP	CNXC	STOCK
COLUMBIA BANKING SYSTEMS INC	COLB	STOCK
CHESAPEAKE UTILITY CORP	CPK	STOCK
CAMDEN PROPERTY TRUST SBI	CPT	STOCK
CRA INTL INC	CRAI	STOCK
SALESFORCE INC	CRM	STOCK
CISCO SYSTEMS INC	CSCO	STOCK
CSL LTD SPONSORED ADR	CSLLY	STOCK
CUBESMART	CUBE	STOCK
CHEVRON CORP	CVX	STOCK
CYBER ARK SOFTWARE LTD	CYBR	STOCK
DARLING INGREDIENTS INC	DAR	STOCK
DECKERS OUTDOOR CORP	DECK	STOCK
DISCOVER FINANCIAL SERVICES	DFS	STOCK
QUEST DIAGNOSTICS INC	DGX	STOCK
DOMINOS PIZZA INC	DPZ	STOCK
DUKE ENERGY CORP	DUK	STOCK
EASTGROUP PROPERTIES INC	EGP	STOCK
ENCOMPASS HEALTH CORP	EHC	STOCK
ESTEE LAUDER CO INC	EL	STOCK
ENSIGN GROUP INC	ENSG	STOCK
EQUINIX INC PAR $0.001	EQIX	STOCK
ELEMENT SOLUTIONS INC	ESI	STOCK
EATON CORP PLC	ETN	STOCK
ETSY INC	ETSY	STOCK
EAST WEST BANCORP INC	EWBC	STOCK
EXP WORLD HOLDINGS INC	EXPI	STOCK
FRESHPET INC	FRPT	STOCK
FEDERAL REALTY INVESTMENT TR NEW	FRT	STOCK
FIRST SOLAR INC	FSLR	STOCK
GLOBANT S A	GLOB	STOCK
ALPHABET INC CL C	GOOG	STOCK
GOLDMAN SACHS GQG PARTNERS INTL OPPTYS INVESTOR CL	GSINX	STOCK
GRAINGER W W INC	GWW	STOCK
HOME DEPOT INC	HD	STOCK
HAMILTON LANE INC CL A	HLNE	STOCK
HORACE MANN EDUCATORS CORP	HMN	STOCK
HOME BANCSHARES INC	HOMB	STOCK
HONEYWELL INTL INC	HON	STOCK

HEXCEL CORP NEW	HXL	STOCK
INTERCONTINENTAL EXCHANGE INC	ICE	STOCK
ICON PLC	ICLR	STOCK
INTERCONTINENTAL HOTELS GROUP PLC NEW SPON ADR NEW 2018	IHG	STOCK
INTEL CORP	INTC	STOCK
INTUIT INC	INTU	STOCK
INTER PARFUMS INC	IPAR	STOCK
IPG PHOTONICS CORP	IPGP	STOCK
INTUITIVE SURGICAL INC NEW	ISRG	STOCK
ILLINOIS TOOL WORKS INC	ITW	STOCK
JB HUNT TRANSPORT SERVICES INC	JBHT	STOCK
JACK HENRY & ASSOCIATES INC	JKHY	STOCK
JONES LANG LASALLE INC	JLL	STOCK
JPMORGAN CHASE & CO	JPM	STOCK
KFORCE INC	KFRC	STOCK
KULICKE & SOFFA INDUSTRIES INC	KLIC	STOCK
KINSALE CAPITAL GROUP INC	KNSL	STOCK
QUAKER HOUGHTON	KWR	STOCK
LINCOLN ELECTRIC HOLDINGS INC	LECO	STOCK
LEVI STRAUSS & CO CL A NEW	LEVI	STOCK
LITTELFUSE INC	LFUS	STOCK
LAKELAND FINL CORP	LKFN	STOCK
LKQ CORP	LKQ	STOCK
ELI LILLY & CO	LLY	STOCK
LEMAITRE VASCULAR INC	LMAT	STOCK
LOCKHEED MARTIN CORP	LMT	STOCK
LIVE OAK BANCSHARES INC	LOB	STOCK
LPL FINANCIAL HOLDINGS INC	LPLA	STOCK
L OREAL COMPANY ADR	LRLCY	STOCK
LANDSTAR SYSTEM INC	LSTR	STOCK
LTC PROPERTIES INC	LTC	STOCK
LVMH MOET HENNESSY LOUIS VUITTON ADR	LVMUY	STOCK
LAMB WESTON HLDGS INC	LW	STOCK
MASTERCARD INC CL A	MA	STOCK
MANPOWERGROUP INC	MAN	STOCK
META PLATFORMS INC CL A	META	STOCK
MIDDLEBY CORP	MIDD	STOCK
MC CORMICK & CO INC NON VOTING	MKC	STOCK
MARSH & MCLENNAN COS INC	MMC	STOCK
MERIT MEDICAL SYSTEMS INC	MMSI	STOCK
MONSTER BEVERAGE CORP NEW	MNST	STOCK
MERCK & COMPANY INC	MRK	STOCK
MSA SAFETY INC	MSA	STOCK

MSCI INC CLASS A	MSCI	STOCK
MICROSOFT CORP	MSFT	STOCK
MATERION CORP	MTRN	STOCK
MYR GROUP INC DE	MYRG	STOCK
NEXTERA ENERGY INC	NEE	STOCK
NETFLIX INC	NFLX	STOCK
INGEVITY CORP	NGVT	STOCK
NIKE INC CL B	NKE	STOCK
NORTHERN OIL & GAS INC NEW	NOG	STOCK
SERVICENOW INC	NOW	STOCK
INSPERITY INC	NSP	STOCK
NESTLE S A SPON ADR REPSTG REG SHS	NSRGY	STOCK
NVIDIA CORP	NVDA	STOCK
NOVO NORDISK AS ADR	NVO	STOCK
NEXPOINT RESIDENTIAL TRUST INC	NXRT	STOCK
NEXSTAR MEDIA GROUP INC	NXST	STOCK
NEW YORK TIMES CL A	NYT	STOCK
UNIVERSAL DISPLAY CORP	OLED	STOCK
OMNICELL INC	OMCL	STOCK
ORMAT TECHNOLOGIES INC	ORA	STOCK
BANK OZK	OZK	STOCK
PALO ALTO NETWORKS INC	PANW	STOCK
PAYCHEX INC	PAYX	STOCK
PAYLOCITY HOLDING CORP	PCTY	STOCK
PENUMBRA INC	PEN	STOCK
PEPSICO INC	PEP	STOCK
PROCTER & GAMBLE CO	PG	STOCK
PROLOGIS INC	PLD	STOCK
PHILIP MORRIS INTL INC	PM	STOCK
POWER INTEGRATIONS INC	POWI	STOCK
PERRIGO CO PLC	PRGO	STOCK
PHILLIPS 66	PSX	STOCK
PAYPAL HOLDINGS INC	PYPL	STOCK
PAPA JOHNS INTL INC	PZZA	STOCK
REINSURANCE GROUP AMERICA INC NEW	RGA	STOCK
ROGERS CORP	ROG	STOCK
SAP SE SPON ADR	SAP	STOCK
STARBUCKS CORP	SBUX	STOCK
SHOE CARNIVAL INC	SCVL	STOCK
SOLAREDGE TECHNOLOGIES INC	SEDG	STOCK
STIFEL FINANCIAL CORP	SF	STOCK
SHERWIN WILLIAMS CO	SHW	STOCK
SIEMENS HEALTHINEERS AG UNSPON ADR	SMMNY	STOCK

SNAP ON INC	SNA	STOCK
SCHNEIDER NATL INC WI CL B	SNDR	STOCK
SONOCO PRODUCTS CO	SON	STOCK
S&P GLOBAL INC	SPGI	STOCK
SPLUNK INC CHG	SPLK	STOCK
SHUTTERSTOCK INC	SSTK	STOCK
STEVANATO GROUP S P A USD	STVN	STOCK
STANDEX INTL CORP	SXI	STOCK
SENSIENT TECHNOLOGIES CORP	SXT	STOCK
STRYKER CORP	SYK	STOCK
ATLASSIAN CORP CL A	TEAM	STOCK
TARGET CORP	TGT	STOCK
HANOVER INSURANCE GROUP INC	THG	STOCK
THERMO FISHER SCIENTIFIC INC	TMO	STOCK
TRAVEL LEISURE CO	TNL	STOCK
TREX CO INC	TREX	STOCK
TRIMBLE INC	TRMB	STOCK
TERRENO REALTY CORP	TRNO	STOCK
TRACTOR SUPPLY CO	TSCO	STOCK
TESLA INC	TSLA	STOCK
TETRA TECH INC NEW	TTEK	STOCK
UBER TECHNOLOGIES INC	UBER	STOCK
UFP INDUSTRIES INC	UFPI	STOCK
UMH PROPERTIES INC	UMH	STOCK
UNIFIRST CORP	UNF	STOCK
UNITEDHEALTH GROUP INC	UNH	STOCK
UNION PACIFIC CORP	UNP	STOCK
UNITED PARCEL SERVICE INC CL B	UPS	STOCK
U S BANCORP DE NEW	USB	STOCK
U S PHYSICAL THERAPY INC	USPH	STOCK
UTZ BRANDS INC CL A	UTZ	STOCK
VISA INC CL A	V	STOCK
VALMONT INDUSTRIES INC	VMI	STOCK
VERIZON COMMUNICATIONS INC	VZ	STOCK
WABTEC	WAB	STOCK
WEBSTER FINANCIAL CORP WATERBURY CT	WBS	STOCK
WORKDAY INC CL A	WDAY	STOCK
WEC ENERGY GROUP INC	WEC	STOCK
WINGSTOP INC	WING	STOCK
WOLFSPEED INC	WOLF	STOCK
ESSENTIAL UTILITIES INC	WTRG	STOCK
ZOETIS INC CL A	ZTS	STOCK

Janet Robert Trust
Stock and Bond Holdings No Longer Held as of 12/31/23 – Sold in 2023

Description	Symbol	Type
SELL - DWIGHT IL SER C DB AGM B/E B/Q SBJ ST TAX CPN 4.000% DUE 12/01/26 DTD 09/29/16 FC 06/01/17 - SALE VS PURCHASE TRADE		BOND
SELL - POCONO MTN PA SCH DIST AGM B/E CPN 5.000% DUE 09/01/24 DTD 01/12/16 FC 03/01/16 - SALE VS PURCHASE TRADE		BOND
SELL - YUMA AZ MUN PPTY CORP EXCISE TAX REV RFDG SR LIEN B/E PTC CPN 4.000% DUE 07/01/26 DTD 10/21/15 FC 01/01/16 CALL 07/01/25 @ 100.000 - SALE VS PURCHASE		BOND
SELL - ADVANCE AUTO PARTS INC - SALE VS PURCHASE TRADE	AAP	STOCK
SELL - ALTRA INDUSTRIAL MOTION CORP - SALE VS PURCHASE TRADE	AIMC	STOCK
SELL - ALIGN TECHNOLOGY INC - SALE VS PURCHASE TRADE	ALGN	STOCK
SELL - ALGONQUIN POWER & UTILITIES CORP - SALE VS PURCHASE TRADE	AQN	STOCK
SELL - ARIS WATER SOLUTIONS INC CL A - SALE VS PURCHASE TRADE	ARIS	STOCK
SELL - ASML HOLDING NV NY REGISTRY SHS NEW 2012	ASML	STOCK
SELL - AUDIOCODES LTD - SALE VS PURCHASE TRADE	AUDC	STOCK
SELL - AVISTA CORP - SALE VS PURCHASE TRADE	AVA	STOCK
SELL - BLACKBAUD INC - SALE VS PURCHASE TRADE	BLKB	STOCK
SELL - BOSTON PROPERTIES INC * - SALE VS PURCHASE TRADE	BXP	STOCK
SELL - CHURCH & DWIGHT COMPANY INC - SALE VS PURCHASE TRADE	CHD	STOCK
SELL - DEXCOM INC - SALE VS PURCHASE TRADE	DXCM	STOCK
SELL - HANNON ARMSTRONG SUSTAINABLE INFRA CAPITAL INC - SALE VS PURCHASE TRADE	HASI	STOCK
SELL - HOST HOTELS * & RESORTS INC - SALE VS PURCHASE TRADE	HST	STOCK
SELL - KAISER ALUMINUM CORP COM PAR $0.01 - SALE VS PURCHASE TRADE	KALU	STOCK
SELL - KENNEDY-WILSON HOLDINGS INC - SALE VS PURCHASE TRADE	KW	STOCK
SELL - LHC GROUP INC - SALE VS PURCHASE TRADE	LHCG	STOCK
SELL - MEDTRONIC PLC - SALE VS PURCHASE TRADE	MDT	STOCK
SELL - MONRO INC - SALE VS PURCHASE TRADE	MNRO	STOCK
SELL - ALTRIA GROUP INC - SALE VS PURCHASE TRADE	MO	STOCK
SELL - MERITAGE HOMES CORP - SALE VS PURCHASE TRADE	MTH	STOCK
SELL - NANOSTRING TECHNOLOGIES INC - SALE VS PURCHASE TRADE	NSTG	STOCK
SELL - QUANTA SERVICES INC - SALE VS PURCHASE TRADE	PWR	STOCK
SELL - SANDY SPRING BANCORP INC - SALE VS PURCHASE TRADE	SASR	STOCK
SELL - STARBUCKS CORP - SALE VS PURCHASE TRADE	SBUX	STOCK
SELL - SEA LTD ADR - SALE VS PURCHASE TRADE	SE	STOCK
SELL - SYNEOS HEALTH INC CL A - SALE VS PURCHASE TRADE	SYNH	STOCK
SELL - TTEC HOLDINGS INC - SALE VS PURCHASE TRADE	TTEC	STOCK
SELL - UNITY SOFTWARE INC	U	STOCK
SELL - XYLEM INC - SALE VS PURCHASE TRADE	XYL	STOCK

Date Received by Office of the Clerk		Page Number 1

FINANCIAL DISCLOSURE REPORT
Office of Congressional Ethics
United States House of Representatives

Name (*Print last, first, middle initial*)
MILLER, LORRAINE C

Step 1: Read the instructions for Parts I through V on the following pages.

Step 2: For each statement below, check Yes or No to describe your situation.

I. I have reportable assets or sources of income for myself, my spouse, or my dependent children.	**Yes** ☐	**No** ☑
II. I have reportable liabilities (debts) for myself, my spouse, or my dependent children.	**Yes** ☐	**No** ☑
III. I have reportable outside positions for myself.	**Yes** ☐	**No** ☑
IV. I have reportable agreements or arrangements for myself.	**Yes** ☐	**No** ☑
V. I have reportable gifts or travel reimbursements for myself, my spouse, or my dependent children.	**Yes** ☐	**No** ☑

Step 3: If you selected Yes for any statement, you must describe the reportable interests that you have in the corresponding Part (I, II, III, IV, or V) of the form.

Step 4: Sign and date the form.

Step 5: Submit the completed form to the Legislative Resource Center, U.S. House of Representatives, B-81 Cannon House Office Building, Washington, DC 20515.

I certify that the statements I have made on this form and all attached statements are true, complete, and correct to the best of my knowledge.

Signature of Member	Date (*mm/dd/yy*)
	May 15, 2024

OCE Financial Disclosure Form

Name (Print last, first, middle initial)	Page Number
MILLER, LORRAINE C.	2

Part I: Assets and Income

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Assets held for investment or the production of income that ended the reporting period with a value greater than $1,000. In addition, assets from which more than $1,000 in income was received during the reporting period. Reportable assets include, but are not limited to: - Assets such as stocks, bonds, annuities, trust holdings, partnership interests, life insurance, investment real estate, or a privately-held trade or business - Sector mutual funds: those funds invested in a particular industry, business, or location, such as ABC Electronics Fund or XYZ Canada Fund (report the full name of the fund, not just the family fund name) - Holdings of retirement plans, such as 401(k)s or IRAs, investment life insurance, or variable annuities (report each holding unless listed in the Do Not Report section) - Defined benefit pension plans provided by a former employer (include the name of the employer)	• Federal Government retirement benefits • Thrift Savings Plan • Certificates of deposit, savings or checking accounts • Term life insurance • Money market mutual funds and money market accounts • Your personal residence, unless you rent all or part of it out • U.S. Government Treasury bonds, bills, notes, and savings bonds • Diversified mutual funds, such as ABC Equity Value Fund or XYZ Large Capital Fund • Diversified funds within an employee benefit plan • Money owed to you, your spouse, or dependent child by a spouse, parent, sibling, or child

Also Report:	Do Not Report:
• For yourself: (1) all sources of salary, fees, commissions, and other earned income greater than $1,000, (2) honoraria greater than $1,000, and (3) other non-investment income such as scholarships, prizes, and gambling income greater than $1,000 • For your spouse: (1) all sources of salary, fees, commissions, and other earned income greater than $1,000, and (2) honoraria greater than $1,000	• Dependent child's earned income • Veterans' benefits • Federal Government salary • Social Security benefits

Important Definitions

Diversified Mutual Fund – A mutual fund that does not have a stated policy of concentrating its investments in one industry, business, or single country other than the United States.
Sector Mutual Fund – A mutual fund that concentrates its investments in an industry, business, single country other than the United States, or bonds of a single state within the United States.
Diversified Fund within an Employee Benefit Plan – An employee benefit plan fund that has a written policy of varying investments without concentration in one industry, business, or single country other than the United States.
Dependent Child – A son, daughter, stepson or stepdaughter who is either unmarried and under age 21 and living in the filer's house, **or** considered dependent under the U.S. tax code.

Reportable Information – Go to the last page to see examples of how to report assets and income.

Specific stock, bond, sector mutual fund, type/location of real estate, etc. *(Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.)* **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** *(Include brief description.)* **You may** distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	**No longer held**
1 NOT APPLICABLE	☐
2	☐
3	☐
4	☐

OCE Financial Disclosure Form

Name (Print last, first, middle initial)	Page Number
MILLER, LORRAINE C	3

Part I: Assets and Income

Continuation Page

Specific stock, bond, sector mutual fund, type/location of real estate, etc. (*Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.*) **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** (*Include brief description.*) **You may** distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	No longer held
1 NOT APPICABLE	☐
2	☐
3	☐
4	☐
5	☐
6	☐
7	☐
8	☐
9	☐
10	☐
11	☐
12	☐
13	☐
14	☐
15	☐
16	☐
17	☐
18	☐
19	☐
20	☐

OCE Financial Disclosure Form

Name (*Print last, first, middle initial*)	Page Number
MILLER, LORRAINE C	4

Part II: Liabilities

Report for Yourself, Spouse, and Dependent Child:	**Do Not Report:**
• Liabilities that exceeded $10,000 during the reporting period	• Any liability, such as a mortgage, a student loan, or a credit card account, from a financial institution or business entity granted on terms made available to the general public • Loans secured by automobiles, household furniture, or appliances, unless the loan exceeds the purchase price of the item it secures • Liabilities that you owe to your spouse or to the parent, sibling, or child of you, your spouse, or your dependent child

Reportable Information – Go to the last page to see examples of how to report liabilities.

Name of creditor *(include city and state where creditor is located)*	**Type of liability** *(personal loan, margin account, etc.)*
1 NOT APPLICABLE	
2	
3	
4	
5	
6	
7	
8	
9	
10	

OCE Financial Disclosure Form

Name (*Print last, first, middle initial*)	Page Number
MILLER, LORRAINE C	5

Part III: Outside Positions

Report for Yourself:	Do Not Report:
• All positions outside the U.S. Government held at any time during the reporting period, whether or not you were compensated and whether or not you currently hold that position. Positions include an officer, director, employee, trustee, general partner, proprietor, representative, executor, or consultant of any of the following: – Corporation, partnership, trust, or other business entity – Non-profit or volunteer organization – Educational institution – State or Local Government	• Any position with a – Religious entity – Social entity – Fraternal entity – Political entity • Any position held by your spouse or dependent child • Any position that you hold as part of your official duties

Reportable Information – Go to the last page to see examples of how to report outside positions.

Organization (*include city and state where organization is located*)	Type of organization	Position	No longer held
1 U.S. CAPITOL HISTORICAL SOCIETY - WASHINGTON, D.C.	HISTORY	MEMBER BOARD OF TRUSTEE	☐
2 DEVELOPMENT CORPORATION OF TARRANT COUNTY - FT. WORTH, TX	HOUSING/AFFORDABLE	MEMBER,	☐
3 FT. WORTH TARRANT COUNTY NAACP - FORT WORTH TX	CIVIL RIGHTS	MEMBER, EXECUTIVE COMMITTEE	☐
4 HISTORIC SOUTHSIDE FT. WORTH NEIGHBORHOOD ASSO. - TX	NEIGHBORHOOD FT. WORTH		☐
5			☐
6			☐
7			☐
8			☐
9			☐
10			☐

OCE Financial Disclosure Form

Name (Print last, first, middle initial)	Page Number
MILLER, LORRAINE C	6

Part IV: Agreements or Arrangements

Report Your Agreements or Arrangements for:	Do Not Report:
• Continuing participation in an employee pension or benefit plan maintained by a current or former employer • A leave of absence • Future employment, including date you accepted employment offer • Continuation of payment by a current or former employer (including severance payments)	• Any agreement or arrangement related to your employment by the Federal Government • Spouse's and dependent child's agreements or arrangements • Continuing participation in a defined contribution plan, such as a 401(k) plan, to which a former employer is no longer making contributions

Reportable Information – Go to the last page to see examples of how to report agreements and arrangements.

Entity with which you have an agreement or arrangement *(include city and state where entity is located)*	**Terms of Agreement or Arrangement**
1 NOT APPLICABLE	
2	
3	
4	
5	
6	
7	
8	
9	
10	

OCE Financial Disclosure Form

Name (Print last, first, middle initial)	Page Number
MILLER, LORRAINE C	7

Part V: Gifts and Travel Reimbursements

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Any gifts or travel reimbursements (items such as lodging, transportation, and food) totaling more than $480* from any one source during the reporting period; include where you traveled, the purpose, and date(s) of the trip for travel gifts and reimbursements * If you received more than one gift from one source: 1. Determine the value of each item you received from that source 2. Ignore each item valued at $192 or less 3. Add the value of those items valued at more than $192; if the total is more than $480, then you must list those items on this form	• Anything received from relatives, the U.S. Government, D.C., state, or local governments • Bequests and other forms of inheritance • Gifts and travel reimbursements given to your office in connection with your official travel • Gifts of hospitality (food, lodging, entertainment) at the donor's residence or personal premises • Anything received by your spouse or dependent child totally independent of their relationship to you

Reportable Information – Go to the last page to see examples of how to report gifts and travel reimbursements.

Source	Description
1 NOT APPLICABLE	—
2	
3	

EXAMPLES

Part I: Assets and Income

Specific stock, bond, sector mutual fund, type/location of real estate, etc. *(Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.)* **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** *(Include brief description.)* **You may** distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	**No longer held**
	☐
	☐
	☐
	☐
	☐
	☐
	☐
	☐

Part II: Liabilities

Name of creditor *(city and state)*	**Type of liability** *(personal loan, margin account, etc.)*

Part III: Outside Positions

Organization *(city and state)*	**Type of organization**	**Position**	**No longer held**
	Educational institution	Professor	☐
	Family Trust	Trustee	☐
	Non-profit environmental organization	Member, Board of Directors	☐

Part IV: Agreements or Arrangements

Entity with which you have an agreement or arrangement *(include city and state where entity is located)*	**Terms of Agreement or Arrangement**

Part V: Gifts and Travel Reimbursements

Source	**Description**

Date Received by Office of the Clerk	Page Number 1

FINANCIAL DISCLOSURE REPORT

Office of Congressional Ethics

United States House of Representatives

Name (Print last, first, middle initial)
Vinovich, Paul D.

Step 1: Read the instructions for Parts I through V on the following pages.

Step 2: For each statement below, check Yes or No to describe your situation.

I. I have reportable assets or sources of income for myself, my spouse, or my dependent children.	**Yes** ☑	**No** ☐
II. I have reportable liabilities (debts) for myself, my spouse, or my dependent children.	**Yes** ☐	**No** ☑
III. I have reportable outside positions for myself.	**Yes** ☐	**No** ☑
IV. I have reportable agreements or arrangements for myself.	**Yes** ☐	**No** ☑
V. I have reportable gifts or travel reimbursements for myself, my spouse, or my dependent children.	**Yes** ☐	**No** ☑

Step 3: If you selected Yes for any statement, you must describe the reportable interests that you have in the corresponding Part (I, II, III, IV, or V) of the form.

Step 4: Sign and date the form.

Step 5: Submit the completed form to the Legislative Resource Center, U.S. House of Representatives, B-81 Cannon House Office Building, Washington, DC 20515.

I certify that the statements I have made on this form and all attached statements are true, complete, and correct to the best of my knowledge.

Signature of Member	Date (mm/dd/yy)
	5/15/24

Vinovich, Paul N.   Page 2

Attachment

Part 1 – Assets and Income

1. GSK PLC (GSK)
2. Amgen Inc. (AMGN)
3. Apple Inc. (AAPL)
4. Bank of America Corporation (BAC)
5. Caterpillar Inc. (CAT)
6. Coca Cola Company (KO)
7. CVS Health Corporation (CVS)
8. Dominion Energy Inc. (D)
9. Duff & Phelps Utility and Infrastructure Fund Inc. (DPG)
10. Exxon Mobil Corp. (XOM)
11. General Dynamics Corp. (GD)
12. General Mills Inc. (GIS)
13. Gilead Sciences Inc. (GILD)
14. Home Depot Inc. (HD)
15. JPMorgan Chase & Co. (JPM)
16. Metlife Inc. (MET)
17. Morgan Stanley (MS)
18. Pfizer Inc. (PFE)
19. United Parcel Service Inc. (UPS)
20. Verizon Communications (VZ)
21. Walt Disney Co. (DIS)
22. Compass Diversified Shares (CODI)
23. Gladstone Capital Corp. (GLAD)
24. Lyondell Basell Industries (LYB)
25. Sun Life Financial (SLF)
26. Unilever PLC (UL)
27. Gladstone Commercial Corp. (GOOD)
28. Elme Communities (ELME)
29. Residential Real Estate – Washington, DC
30. Residential Real Estate – Rehoboth Beach, DE
31. S – Residential Real Estate – Washington, DC
32. S – Fidelity Select Software & IT (FSCSX)
33. S – Fidelity Select Med Tech & Devices (FSMEX)
34. S – Lululemon Athletica Inc. (LULU)
35. S – Netflix (NFLX)
36. S – NVIDIA Corp (NVDA)
37. S – Bank of America (Employer – Government Affairs – Salary & Stock)

OCE Financial Disclosure Form

Name (Print last, first, middle initial) Vinovich, Paul D.	Page Number 3

Part I: Assets and Income

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Assets held for investment or the production of income that ended the reporting period with a value greater than $1,000. In addition, assets from which more than $1,000 in income was received during the reporting period. Reportable assets include, but are not limited to: – Assets such as stocks, bonds, annuities, trust holdings, partnership interests, life insurance, investment real estate, or a privately-held trade or business – Sector mutual funds: those funds invested in a particular industry, business, or location, such as ABC Electronics Fund or XYZ Canada Fund (report the full name of the fund, not just the family fund name) – Holdings of retirement plans, such as 401(k)s or IRAs, investment life insurance, or variable annuities (report each holding unless listed in the Do Not Report section) – Defined benefit pension plans provided by a former employer (include the name of the employer)	• Federal Government retirement benefits • Thrift Savings Plan • Certificates of deposit, savings or checking accounts • Term life insurance • Money market mutual funds and money market accounts • Your personal residence, unless you rent all or part of it out • U.S. Government Treasury bonds, bills, notes, and savings bonds • Diversified mutual funds, such as ABC Equity Value Fund or XYZ Large Capital Fund • Diversified funds within an employee benefit plan • Money owed to you, your spouse, or dependent child by a spouse, parent, sibling, or child

Also Report:	Do Not Report:
• For yourself: (1) all sources of salary, fees, commissions, and other earned income greater than $1,000, (2) honoraria greater than $1,000, and (3) other non-investment income such as scholarships, prizes, and gambling income greater than $1,000 • For your spouse: (1) all sources of salary, fees, commissions, and other earned income greater than $1,000, and (2) honoraria greater than $1,000	• Dependent child's earned income • Veterans' benefits • Federal Government salary • Social Security benefits

Important Definitions

Diversified Mutual Fund – A mutual fund that does not have a stated policy of concentrating its investments in one industry, business, or single country other than the United States.
Sector Mutual Fund – A mutual fund that concentrates its investments in an industry, business, single country other than the United States, or bonds of a single state within the United States.
Diversified Fund within an Employee Benefit Plan – An employee benefit plan fund that has a written policy of varying investments without concentration in one industry, business, or single country other than the United States.
Dependent Child – A son, daughter, stepson or stepdaughter who is either unmarried and under age 21 and living in the filer's house, **or** considered dependent under the U.S. tax code.

Reportable Information – Go to the last page to see examples of how to report assets and income.

Specific stock, bond, sector mutual fund, type/location of real estate, etc. *(Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.)* **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** *(Include brief description.)* **You may** distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	**No longer held**
1	☐
2 SEE ATTACHMENT	☐
3	☐
4	☐

OCE Financial Disclosure Form

Name (*Print last, first, middle initial*) Vinovich, Paul D.	Page Number 4

Part I: Assets and Income

Continuation Page

Specific stock, bond, sector mutual fund, type/location of real estate, etc. (*Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.*) **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** (*Include brief description.*) **You may** distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	**No longer held**
1	☐
2	☐
3	☐
4	☐
5	☐
6	☐
7	☐
8	☐
9	☐
10	☐
11	☐
12	☐
13	☐
14	☐
15	☐
16	☐
17	☐
18	☐
19	☐
20	☐

OCE Financial Disclosure Form

Name (*Print last, first, middle initial*)	Page Number
Visclosky, Paul J.	5

Part II: Liabilities

Report for Yourself, Spouse, and Dependent Child:	**Do Not Report:**
• Liabilities that exceeded $10,000 during the reporting period	• Any liability, such as a mortgage, a student loan, or a credit card account, from a financial institution or business entity granted on terms made available to the general public • Loans secured by automobiles, household furniture, or appliances, unless the loan exceeds the purchase price of the item it secures • Liabilities that you owe to your spouse or to the parent, sibling, or child of you, your spouse, or your dependent child

Reportable Information – Go to the last page to see examples of how to report liabilities.

Name of creditor (*include city and state where creditor is located*)	**Type of liability** (*personal loan, margin account, etc.*)
1	
2	
3	N/A
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OCE Financial Disclosure Form

Name (*Print last, first, middle initial*) Vinovich, Paul P.	Page Number 6

Part III: Outside Positions

Report for Yourself:	Do Not Report:
• All positions outside the U.S. Government held at any time during the reporting period, whether or not you were compensated and whether or not you currently hold that position. Positions include an officer, director, employee, trustee, general partner, proprietor, representative, executor, or consultant of any of the following: – Corporation, partnership, trust, or other business entity – Non-profit or volunteer organization – Educational institution – State or Local Government	• Any position with a – Religious entity – Social entity – Fraternal entity – Political entity • Any position held by your spouse or dependent child • Any position that you hold as part of your official duties

Reportable Information – Go to the last page to see examples of how to report outside positions.

Organization (*include city and state where organization is located*)	Type of organization	Position	No longer held
1			☐
2			☐
3			☐
4 N/A			☐
5			☐
6			☐
7			☐
8			☐
9			☐
10			☐

OCE Financial Disclosure Form

Name (*Print last, first, middle initial*)	Page Number
Vinovich, Paul P.	7

Part IV: Agreements or Arrangements

Report Your Agreements or Arrangements for:	Do Not Report:
• Continuing participation in an employee pension or benefit plan maintained by a current or former employer • A leave of absence • Future employment, including date you accepted employment offer • Continuation of payment by a current or former employer (including severance payments)	• Any agreement or arrangement related to your employment by the Federal Government • Spouse's and dependent child's agreements or arrangements • Continuing participation in a defined contribution plan, such as a 401(k) plan, to which a former employer is no longer making contributions

Reportable Information – Go to the last page to see examples of how to report agreements and arrangements.

Entity with which you have an agreement or arrangement *(include city and state where entity is located)*	**Terms of Agreement or Arrangement**
1	
2	
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4	N/A
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OCE Financial Disclosure Form

Name (*Print last, first, middle initial*) Vinovich, Paul D.	Page Number 8

Part V: Gifts and Travel Reimbursements

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Any gifts or travel reimbursements (items such as lodging, transportation, and food) totaling more than $480* from any one source during the reporting period; include where you traveled, the purpose, and date(s) of the trip for travel gifts and reimbursements * If you received more than one gift from one source: 1. Determine the value of each item you received from that source 2. Ignore each item valued at $192 or less 3. Add the value of those items valued at more than $192; if the total is more than $480, then you must list those items on this form	• Anything received from relatives, the U.S. Government, D.C., state, or local governments • Bequests and other forms of inheritance • Gifts and travel reimbursements given to your office in connection with your official travel • Gifts of hospitality (food, lodging, entertainment) at the donor's residence or personal premises • Anything received by your spouse or dependent child totally independent of their relationship to you

Reportable Information – Go to the last page to see examples of how to report gifts and travel reimbursements.

Source	Description
1	
2	N/A
3	

Date Received by Office of the Clerk	Use arrow keys to read all text. Tab to complete form.	Page Number

FINANCIAL DISCLOSURE REPORT
Office of Congressional Ethics
United States House of Representatives

Name *(Print last, first, middle initial)*
Westmoreland Lynn A

Step 1: Read the instructions for Parts I through V on the following pages.

Step 2: For each statement below, check Yes or No to describe your situation.

I. **I have reportable assets or sources of income for myself, my spouse, or my dependent children.**	Yes	No
II. **I have reportable liabilities (debts) for myself, my spouse, or my dependent children.**	Yes	No
III. **I have reportable outside positions for myself.**	Yes	No
IV. **I have reportable agreements or arrangements for myself.**	Yes	No
V. **I have reportable gifts or travel reimbursements for myself, my spouse, or my dependent children.**	Yes	No

Step 3: If you selected Yes for any statement, you must describe the reportable interests that you have in the corresponding Part (I, II, III, IV, or V) of the form.

Step 4: Sign and date the form.

Step 5: Submit the completed form to the Legislative Resource Center, U.S. House of Representatives, B-81 Cannon House Office Building, Washington, DC 20515.

I certify that the statements I have made on this form and all attached statements are true, complete, and correct to the best of my knowledge.

Signature of Member	Date *(mm/dd/yy)*
	5/13/2024

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OCE Financial Disclosure Form

Name *(Print last, first, middle initial)*	Page Number
	1

Part I: Assets and Income

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Assets held for investment or the production of income that ended the reporting period with a value greater than $1,000. In addition, assets from which more than $1,000 in income was received during the reporting period. Reportable assets include, but are not limited to: – Assets such as stocks, bonds, annuities, trust holdings, partnership interests, life insurance, investment real estate, or a privately-held trade or business – Sector mutual funds: those funds invested in a particular industry, business, or location, such as ABC Electronics Fund or XYZ Canada Fund (report the full name of the fund, not just the family fund name) – Holdings of retirement plans, such as 401(k)s or IRAs, investment life insurance, or variable annuities (report each holding unless listed in the Do Not Report section) – Defined benefit pension plans provided by a former employer (include the name of the employer)	• Federal Government retirement benefits • Thrift Savings Plan • Certificates of deposit, savings or checking accounts • *Term life insurance* • Money market mutual funds and money market accounts • Your personal residence, unless you rent all or part of it out • U.S. Government Treasury bonds, bills, notes, and savings bonds • Diversified mutual funds, such as ABC Equity Value Fund or XYZ Large Capital Fund • Diversified funds within an employee benefit plan • Money owed to you, your spouse, or dependent child by a spouse, parent, sibling, or child

Also Report:	Do Not Report:
• For yourself: (1) all sources of salary, fees, commissions, and other earned income greater than $1,000, (2) honoraria greater than $1,000, and (3) other non-investment income such as scholarships, prizes, and gambling income greater than $1,000 • For your spouse: (1) all sources of salary, fees, commissions, and other earned income greater than $1,000, and (2) honoraria greater than $1,000	• Dependent child's earned income • Veterans' benefits • Federal Government salary • Social Security benefits

Important Definitions

Diversified Mutual Fund – A mutual fund that does not have a stated policy of concentrating its investments in one industry, business, or single country other than the United States.
Sector Mutual Fund – A mutual fund that concentrates its investments in an industry, business, single country other than the United States, or bonds of a single state within the United States.
Diversified Fund within an Employee Benefit Plan – An employee benefit plan fund that has a written policy of varying investments without concentration in one industry, business, or single country other than the United States.
Dependent Child – A son, daughter, stepson or stepdaughter who is either unmarried and under age 21 and living in the filer's house, or considered dependent under the U.S. tax code.

Reportable Information – Go to the last page to see examples of how to report assets and income.

Specific stock, bond, sector mutual fund, type/location of real estate, etc. *(Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.)* **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** *(Include brief description.)* You may distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	No longer held
1 Georgia Legislative Retirement System	
2 Westmoreland Strategies LLC	
3	
4	

OCE Financial Disclosure Form

Name *(Print last, first, middle initial)*	Page Number
Westmoreland, Lynn	2

Part I: Assets and Income

Continuation Page

Specific stock, bond, sector mutual fund, type/location of real estate, etc. *(Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.)* **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** *(Include brief description.)* You may distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	No longer held
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OCE Financial Disclosure Form

Name (*Print last, first, middle initial*)	Page Number
Westmoreland Lynn H	3

Part II: Liabilities

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Liabilities that exceeded $10,000 during the reporting period	• Any liability, such as a mortgage, a student loan, or a credit card account, from a financial institution or business entity granted on terms made available to the general public • Loans secured by automobiles, household furniture, or appliances, unless the loan exceeds the purchase price of the item it secures • Liabilities that you owe to your spouse or to the parent, sibling, or child of you, your spouse, or your dependent child

Reportable Information – Go to the last page to see examples of how to report liabilities.

Name of creditor *(include city and state where creditor is located)*	**Type of liability** *(personal loan, margin account, etc.)*
1	
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Part III: Outside Positions

Report for Yourself:	Do Not Report:
• All positions outside the U.S. Government held at any time during the reporting period, whether or not you were compensated and whether or not you currently hold that position. Positions include an officer, director, employee, trustee, general partner, proprietor, representative, executor, or consultant of any of the following: – Corporation, partnership, trust, or other business entity	• Any position with a – Religious entity – Social entity – Fraternal entity – Political entity • Any position held by your spouse or

- Non-profit or volunteer organization - Educational institution - State or Local Government	dependent child • Any position that you hold as part of your official duties

Reportable Information – Go to the last page to see examples of how to report outside positions.

Organization *(include city and state where organization is located)*	Type of organization	Position	No longer held
1 Westmoreland Strategies LLC		managing member	
2			
3			
4			
5			
6			
7			
8			
9			
10			

☐

OCE Financial Disclosure Form

Name (*Print last, first, middle initial*)	Page Number
Westmoreland Lynn A	4

Part IV: Agreements or Arrangements

Report Your Agreements or Arrangements for:	Do Not Report:
• Continuing participation in an employee pension or benefit plan maintained by a current or former employer • A leave of absence • Future employment, including date you accepted employment offer • Continuation of payment by a current or former employer (including severance payments)	• Any agreement or arrangement related to your employment by the Federal Government • Spouse's and dependent child's agreements or arrangements • *Continuing participation in a defined* contribution plan, such as a 401(k) plan, to which a former employer is no longer making contributions

Reportable Information – Go to the last page to see examples of how to report agreements and arrangements.

Entity with which you have an agreement or arrangement *(include city and state where entity is located)*	Terms of Agreement or Arrangement
1 Georgia Legislative Retirement System	Defined Benefit
2	

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7	
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9	
10	

Part V: Gifts and Travel Reimbursements

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
• Any gifts or travel reimbursements (items such as lodging, transportation, and food) totaling more than $480* from any one source during the reporting period: include where you traveled, the purpose, and date(s) of the trip for travel gifts and reimbursements * If you received more than one gift from one source: 1. Determine the value of each item you received from that source 2. Ignore each item valued at $192 or less 3. Add the value of those items valued at more than $192; if the total is more than $480, then you must list those items on this form	• Anything received from relatives, the U.S. Government, D.C., state, or local governments • Bequests and other forms of inheritance • Gifts and travel reimbursements given to your office in connection with your official travel • Gifts of hospitality (food, lodging, entertainment) at the donor's residence or personal premises • Anything received by your spouse or dependent child totally independent of their relationship to you

Reportable Information – Go to the last page to see examples of how to report gifts and travel reimbursements.

Source	Description
1	N/A
2	
3	

OCE Financial Disclosure Form

EXAMPLES

Part I: Assets and Income

Specific stock, bond, sector mutual fund, type/location of real estate, etc. *(Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.)* **Name of Employer or Business; Source of Fees, Commissions, or Honoraria** *(Include brief description.)* **You may** distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	**No longer held**

Part II: Liabilities

Name of creditor *(city and state)*	**Type of liability** *(personal loan, margin account, etc.)*

Part III: Outside Positions

Organization *(city and state)*	**Type of organization**	**Position**	**No longer held**
	Educational institution	Professor	
	Family Trust	Trustee	
	Non-profit environmental organization	Member, Board of Directors	

Part IV: Agreements or Arrangements

Entity with which you have an agreement or arrangement *(include city and state where entity is located)*	***Terms of Agreement or Arrangement***

Part V: Gifts and Travel Reimbursements

Source	**Description**