

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

COMMUNICATION

FROM

THE CLERK, THE HOUSE OF
REPRESENTATIVES

TRANSMITTING

THE ANNUAL COMPILATION OF FINANCIAL DISCLOSURE STATE-
MENTS FILED WITH THE CLERK OF THE HOUSE OF REP-
RESENTATIVES BY MEMBERS OF THE BOARD OF THE OFFICE
OF CONGRESSIONAL ETHICS



JULY 16, 2025.—Referred to the Committee on Ethics and ordered to be
printed

U.S. GOVERNMENT PUBLISHING OFFICE

OFFICE OF THE CLERK,
HOUSE OF REPRESENTATIVES,
Washington, DC, July 17, 2025.

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

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

This compilation contains the financial disclosure reports and amendments thereto required to be filed by members of the board of the Office of Congressional Conduct, 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, 2024, and December 31, 2024.

House Rule XXVI further provides that the annual compilation of reports filed with the Clerk by members of the board is 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.

Enclosures.

HAND DELIVERED

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Date Received by Office of
the Clerk

2025 JUN 17 PM 1:33

Page Number

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES

FINANCIAL DISCLOSURE REPORT
Office of Congressional Conduct
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

Karen P. Haas

Date (mm/dd/yy)

06/16/25

HAND DELIVERED

Date Received by Office of
the Clerk

Page Number

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U.S. HOUSE OF REPRESENTATIVES

FINANCIAL DISCLOSURE REPORT
Office of Congressional Conduct
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 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

William P. Luther

Date (mm/dd/yy)

6/3/25

OCE Financial Disclosure Form

Name (Print last, first, middle initial) Luther, William P.	Page Number 2
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Part I: Assets and Income

Report for Yourself, Spouse, and Dependent Child: - 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)	Do Not Report: - 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: 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	Do Not Report: - 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 & Heck 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
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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 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 12 th St. RW, LLC, Minneapolis MN.	☒
⁸ Spouse, loan to JR Broadcasting LLC, Eden Prairie MN.	☐
⁸ Spouse, investor in Identify Sensors Fresh Foods, Cleveland OH.	☐
¹⁰ Spouse, investor in Sota Shine Maple Grove, LLC, Maple Grove MN.	☐
¹¹ Spouse, investor in trust in Main Group, LLC, Minneapolis MN.	☐
¹²	☐
¹³	☐
¹⁴	☐
¹⁵	☐
¹⁶	☐
¹⁷	☐
¹⁸	☐
¹⁹	☐
²⁰	☐

OCE Financial Disclosure Form

Name (Print last, first, middle initial) Luther, William P.	Page Number 4
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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 - 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 – OCC – Attachment A

**William Luther Brokerage Account
Stock and Bond Holdings as of 12/31/24**

ASSET	TICKER	TYPE
***ASML HOLDING N V	ASML	STOCK
COSTCO WHOLESALE CORP-NEW	COST	STOCK
DEERE & CO	DE	STOCK
MONGODB INC	MDB	STOCK
NEXTERA ENERGY INC	NEE	STOCK
NORTHERN OIL & GAS INC	NOG	STOCK
NVIDIA CORP	NVDA	STOCK
***OPERA LIMITED	OPRA	STOCK
PFIZER INC	PFE	STOCK
VIKING THERAPEUTICS INC	VKTX	STOCK

**William Luther IRA
Stock and Bond Holdings as of 12/31/24**

ASSET	TICKER	TYPE
AMAZON.COM INC	AMZN	STOCK
ALPHABET INC	GOOGL	STOCK
ALPHABET INC	GOOG	STOCK
AMGEN INC	AMGN	STOCK
APPLE INC	AAPL	STOCK
BERKSHIRE HATHAWAY INC DEL	BRKB	STOCK
BROADCOM INC	AVGO	STOCK
COSTCO WHOLESALE CORP-NEW	COST	STOCK
CROWDSTRIKE HOLDINGS INC	CRWD	STOCK
DELTA AIR LINES INC DEL	DAL	STOCK
HOME DEPOT INC	HD	STOCK
ELI LILLY & CO	LLY	STOCK
MONGODB INC	MDB	STOCK
MICROSOFT CORP	MSFT	STOCK
NVIDIA CORP	NVDA	STOCK
***NOVO NORDISK A/S-ADR	NVO	STOCK
SERVICENOW INC	NOW	STOCK
SNOWFLAKE INC	SNOW	STOCK
STRYKER CORP	SYK	STOCK
TESLA INC	TSLA	STOCK
VISA INC	V	STOCK

William Luther IRA- Sales (No Longer Held)
 Stock and Bond Holdings No Longer Held as of 12/31/24 – Sold in 2024

ASSET	TICKER	TYPE
AMERICAN TOWER CORPORATION	AMT	STOCK
**ALGER WEATHERBIE SPECIALIZED	ASMZX	STOCK
ABBVIE INC	ABBV	STOCK
**ALGER FDS	AFOZX	STOCK
LULULEMON ATHLETICA INC	LULU	STOCK
NEXTERA ENERGY INC	NEE	STOCK
SUPER MICRO COMPUTER INC	SMCI	STOCK
VAIL RESORTS INC	MTN	STOCK

Darlene J Luther Trust
 Stock and Bond Holdings as of 12/31/24

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

WPL – OCC– Attachment B

Janet Robert Trust
Stock and Bond Holdings as of 12/31/24

ASSET	TICKER	TYPE
ABBVIE INC	ABBV	STOCK
AMGEN INC	AMGN	STOCK
CATERPILLAR INC	CAT	STOCK
***COCA-COLA FEMSA SAB DE CV	KOF	STOCK
DEERE & CO	DE	STOCK
DOW INC	DOW	STOCK
DUKE ENERGY CORPORATION	DUK	STOCK
GE AEROSPACE	GE	STOCK
GE HEALTHCARE TECHNOLOGIES INC	GEHC	STOCK
GE VERNOVA LLC	GEV	STOCK
GRACO INC	GGG	STOCK
HONEYWELL INTL INC	HON	STOCK
HOME DEPOT INC	HD	STOCK
INTERNATIONAL BUSINESS	IBM	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
VISA INC	V	STOCK
***SPROTT PHYSICAL GOLD TR	PHYS	STOCK
MINNESOTA ST HSG FIN AGY ST	60416S-MD-9	BOND
MINNEAPOLIS MINN HEALTH CARE	60374V-DN-0	BOND

Janet Robert Trust
Stock and Bond Holdings No Longer Held as of 12/31/24 – Sold in 2024

ASSET	TICKER	TYPE
WALT DISNEY CO	DIS	STOCK
GENERAL MILLS INC	GIS	STOCK
MEDICAL PROPERTIES TRUST INC	MPW	STOCK
STARBUCKS CORP	SBUX	STOCK
***TORONTO-DOMINION BANK	TD	STOCK
UNITED PARCEL SVC INC	UPS	STOCK
UNITEDHEALTH GROUP INC	UNH	STOCK
WALGREEN BOOTS ALLIANCE INC	WBA	STOCK
MINNEAPOLIS & ST PAUL MINN	603827-WB-8	BOND

JMR 2021 Irrevocable Trust
Stock and Bond Holdings as of 12/31/24

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 CORPORATION	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—OCC—Attachment C
Janet Robert Trust
Stock and Bond Holdings as of 12/31/24

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
BUFFALO MN ELEC REV SER A BAM B/E B/Q		BOND
CASH RESERVES		BOND
CHASKA MN INDPT SCH DIST 112 FACS MAINT SER A B/E		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
KINGSLAND MN INDPT SCH DIST 2137 SCH BLDG SER A B/E B/Q CAB@63.824 3.75%		BOND
LAC QUI PARLE VLY MN ISD 2853 FACS MAINT A B/E B/Q ENH PG PTC		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
MORRIS AREA SCHS MN ISD 2769 SCH BLDG A B/E CR ENH CAB @69.202 3.63%		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
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 FRANCIS MN INDPT SCH DIST 015 BLDG RFDG SER A B/E		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
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
ABBOTT LABORATORIES	ABT	STOCK
ABBVIE INC	ABBV	STOCK
ACCENTURE PLC IRELAND CL A	ACN	STOCK
ADOBE INC	ADBE	STOCK
AIR LEASE CORP CL A	AL	STOCK
AIRBNB INC CL A	ABNB	STOCK
ALCON INC	ALC	STOCK
ALLEGION PUBLIC LTD	ALLE	STOCK
ALLEGRO MICROSYSTEMS INC	ALGM	STOCK
ALLISON TRANSMISSION HLDGS INC	ALSN	STOCK
ALLY FINANCIAL INC	ALLY	STOCK
ALPHABET INC CL A	GOOGL	STOCK
ALPHABET INC CL C	GOOG	STOCK
AMAZON.COM INC	AMZN	STOCK
AMGEN INC	AMGN	STOCK
AON PLC CL A	AON	STOCK
APPLE INC	AAPL	STOCK
APTARGROUP INC	ATR	STOCK
ARTHUR J GALLAGHER & COMPANY	AJG	STOCK
ASML HOLDING NV NY REGISTRY SHS NEW 2012	ASML	STOCK
AUTOMATIC DATA PROCESSING INC	ADP	STOCK
AVERY DENNISON CORP	AVY	STOCK
BJS WHOLESALE CLUB HOLDINGS INC	BJ	STOCK
BLACKROCK FDG INC	BLK	STOCK
BRIGHT HORIZONS FAMILY SOLUTIONS INC	BFAM	STOCK
BROOKFIELD INFRASTRUCTURE CORP EXCHANGE SUB VTG SHS A	BIPC	STOCK
BRUNSWICK CORP	BC	STOCK
BURLINGTON STORES INC	BURL	STOCK
BWX TECHNOLOGIES INC	BWXT	STOCK
CABOT CORP	CBT	STOCK
CAMDEN PROPERTY TRUST SBI	CPT	STOCK
CASEYS GENL STORES INC	CASY	STOCK
CHEMED CORP	CHE	STOCK
CHESAPEAKE UTILITY CORP	CPK	STOCK
CHEVRON CORP	CVX	STOCK

CISCO SYSTEMS INC	CSCO	STOCK
CLEAR SECURE INC CL A	YOU	STOCK
COGNEX CORP	CGNX	STOCK
COHEN & STEERS INC	CNS	STOCK
CONCENTRIX CORP	CNXC	STOCK
CONFLUENT INC CL A	CFLT	STOCK
COSTAR GROUP INC	CSGP	STOCK
CRA INTL INC	CRAI	STOCK
CROWN CASTLE INC	CCI	STOCK
CUBESMART	CUBE	STOCK
CYBER ARK SOFTWARE LTD	CYBR	STOCK
DARLING INGREDIENTS INC	DAR	STOCK
DECKERS OUTDOOR CORP	DECK	STOCK
DISCOVER FINANCIAL SERVICES	DFS	STOCK
DOMINOS PIZZA INC	DPZ	STOCK
DUKE ENERGY CORP	DUK	STOCK
DYNATRACE INC	DT	STOCK
E L F BEAUTY INC	ELF	STOCK
EAST WEST BANCORP INC	EWBC	STOCK
EASTGROUP PROPERTIES INC	EGP	STOCK
EATON CORP PLC	ETN	STOCK
ELI LILLY & CO	LLY	STOCK
ENCOMPASS HEALTH CORP	EHC	STOCK
ENSIGN GROUP INC	ENSG	STOCK
EQUINIX INC PAR \$0.001	EQIX	STOCK
ESSENTIAL UTILITIES INC	WTRG	STOCK
ETSY INC	ETSY	STOCK
EXACT SCIENCES CORP	EXAS	STOCK
EXP WORLD HOLDINGS INC	EXPI	STOCK
FEDERAL REALTY INVESTMENT TR	FRT	STOCK
FEDL AGRICULTURAL MORTGAGE CL C	AGM	STOCK
FIRST SOLAR INC	FSLR	STOCK
FIRSTSERVICE CORP	FSV	STOCK
FRESHPET INC	FRPT	STOCK
GLOBANT S A	GLOB	STOCK
GOLDMAN SACHS GQG PARTNERS INTL OPPTYS INVESTOR CL	GSINX	FUND
GRAINGER W W INC	GWV	STOCK
HAMILTON LANE INC CL A	HLNE	STOCK
HANOVER INSURANCE GROUP INC	THG	STOCK
HEALTHSTREAM INC	HSTM	STOCK
HEXCEL CORP	HXL	STOCK
HOME BANCSHARES INC	HOMB	STOCK
HOME DEPOT INC	HD	STOCK

HONEYWELL INTL INC	HON	STOCK
ICON PLC	ICLR	STOCK
ILLINOIS TOOL WORKS INC	ITW	STOCK
INGEVITY CORP	NGVT	STOCK
INSPERITY INC	NSP	STOCK
INTERCONTINENTAL EXCHANGE INC	ICE	STOCK
INTERCONTINENTAL HOTELS GROUP PLC SPON ADR	IHG	STOCK
INTUIT INC	INTU	STOCK
INTUITIVE SURGICAL INC	ISRG	STOCK
IPG PHOTONICS CORP	IPGP	STOCK
IRADIMED CORP	IRMD	STOCK
JACK HENRY & ASSOCIATES INC	JKHY	STOCK
JB HUNT TRANSPORT SERVICES INC	JBHT	STOCK
JONES LANG LASALLE INC	JLL	STOCK
JPMORGAN CHASE & CO	JPM	STOCK
KENVUE INC	KVUE	STOCK
KFORCE INC	KFRC	STOCK
KINSALE CAPITAL GROUP INC	KNSL	STOCK
KULICKE & SOFFA INDUSTRIES INC	KLIC	STOCK
L OREAL COMPANY ADR	LRLCY	STOCK
LAKELAND FINL CORP	LKFN	STOCK
LAMB WESTON HLDGS INC	LW	STOCK
LANDSTAR SYSTEM INC	LSTR	STOCK
LEMAITRE VASCULAR INC	LMAT	STOCK
LINCOLN ELECTRIC HOLDINGS INC	LECO	STOCK
LITTELFUSE INC	LFUS	STOCK
LIVE OAK BANCSHARES INC	LOB	STOCK
LOCKHEED MARTIN CORP	LMT	STOCK
LPL FINANCIAL HOLDINGS INC	LPLA	STOCK
MARSH & MCLENNAN COS INC	MMC	STOCK
MASTERCARD INC CL A	MA	STOCK
MATADOR RESOURCES COMPANY	MTDR	STOCK
MATERION CORP	MTRN	STOCK
MC CORMICK & CO INC NON VOTING	MKC	STOCK
MERCK & COMPANY INC	MRK	STOCK
MERIT MEDICAL SYSTEMS INC	MMSI	STOCK
META PLATFORMS INC CL A	META	STOCK
MICROCHIP TECHNOLOGY INC	MCHP	STOCK
MICROSOFT CORP	MSFT	STOCK
MIDDLEBY CORP	MIDD	STOCK
MONSTER BEVERAGE CORP	MNST	STOCK
MSA SAFETY INC	MSA	STOCK
MSCI INC CLASS A	MSCI	STOCK

MYR GROUP INC DE	MYRG	STOCK
NAPCO SECURITY TECHNOLOGIES INC	NSSC	STOCK
NETFLIX INC	NFLX	STOCK
NEW ATLAS HOLDCO INC CL A	AESI	STOCK
NEW YORK TIMES CL A	NYT	STOCK
NEXPOINT RESIDENTIAL TRUST INC	NXRT	STOCK
NEXSTAR MEDIA GROUP INC	NXST	STOCK
NEXTERA ENERGY INC	NEE	STOCK
NORTHERN OIL & GAS INC	NOG	STOCK
NOVO NORDISK AS ADR	NVO	STOCK
NVENT ELECTRIC PLC VOTING USD 0.01	NVT	STOCK
NVIDIA CORP	NVDA	STOCK
OMNICELL INC	OMCL	STOCK
ORACLE CORP	ORCL	STOCK
ORMAT TECHNOLOGIES INC	ORA	STOCK
PALO ALTO NETWORKS INC	PANW	STOCK
PALOMAR HOLDINGS INC	PLMR	STOCK
PATRICK INDUSTRIES INC	PATK	STOCK
PAYCHEX INC	PAYX	STOCK
PAYCOM SOFTWARE INC	PAYC	STOCK
PAYLOCITY HOLDING CORP	PCTY	STOCK
PAYPAL HOLDINGS INC	PYPL	STOCK
PENUMBRA INC	PEN	STOCK
PERRIGO CO PLC	PRGO	STOCK
PHILIP MORRIS INTL INC	PM	STOCK
PHILLIPS 66	PSX	STOCK
POWER INTEGRATIONS INC	POWI	STOCK
PRICESMART INC	PSMT	STOCK
PROCTER & GAMBLE CO	PG	STOCK
PROLOGIS INC	PLD	STOCK
QUAKER HOUGHTON	KWR	STOCK
QUEST DIAGNOSTICS INC	DGX	STOCK
REINSURANCE GROUP AMERICA INC	RGA	STOCK
ROGERS CORP	ROG	STOCK
S&P GLOBAL INC	SPGI	STOCK
SAGE GROUP PLC ADR	SGPY	STOCK
SALESFORCE INC	CRM	STOCK
SAP SE SPON ADR	SAP	STOCK
SCHNEIDER NATL INC WI CL B	SNDR	STOCK
SENSATA TECHNOLOGIES HOLDING PLC	ST	STOCK
SENSIENT TECHNOLOGIES CORP	SXT	STOCK
SERVICENOW INC	NOW	STOCK
SHERWIN WILLIAMS CO	SHW	STOCK

Janet Robert Trust

Stock and Bond Holdings No Longer Held as of 12/31/24 – Sold in 2024

ACTION	DESCRIPTION	SYMBOL	TYPE
Sell	LAKEVIEW INDPT SCH D 2167 MN SCH BLDG SER A B/E B/Q CPN 2.750% DUE 02/01/24 DTD 07/29/14 FC 02/01/15		BOND
Sell	ST PAUL MN HSG & RED AUTH HC FACS REV RFDG HLTHPARTNERS OBLIG A B/E CPN 5.000% DUE 07/01/25 DTD 06/11/15 FC 01/01/16		BOND
Sell	A O SMITH	AOS	STOCK
Sell	ABM INDUSTRIES INC	ABM	STOCK
Sell	AMN HEALTHCARE SERVI INC	AMN	STOCK
Sell	APTIV PLC	APTV	STOCK
Sell	ATLASSIAN CORP CL A	TEAM	STOCK
Sell	AUTODESK INC	ADSK	STOCK
Sell	AVANGRID INC	AGR	STOCK
Sell	AZENTA INC	AZTA	STOCK
Sell	BALL CORP	BALL	STOCK
Sell	BANK OZK	OZK	STOCK
Sell	CABLE ONE INC	CABO	STOCK
Sell	CHORD ENERGY CORP NEW	CHRD	STOCK
Sell	CIVITAS RESOURCES IN	CIVI	STOCK
Sell	COGENT COMMUNICATION HOLDINGS INC	CCOI	STOCK
Sell	COLUMBIA BANKING SYS INC	COLB	STOCK
Sell	CONCENTRIX CORP	CNXC	STOCK
Sell	CSL LTD SPONSORED ADR	CSLLY	STOCK
Sell	ELEMENT SOLUTIONS IN	ESI	STOCK
Sell	ESTEE LAUDER CO INC	EL	STOCK
Sell	HORACE MANN EDUCATOR CORP	HMN	STOCK
Sell	INTEL CORP	INTC	STOCK
Sell	INTER PARFUMS INC	IPAR	STOCK
Sell	LEVI STRAUSS & CO CL A NEW	LEVI	STOCK
Sell	LKQ CORP	LKQ	STOCK
Sell	LTC PROPERTIES INC	LTC	STOCK
Sell	LVMH MOET HENNESSY L VUITTON ADR	LVMUY	STOCK
Sell	MANPOWERGROUP INC	MAN	STOCK
Sell	NESTLE S A SPON ADR REPSTG REG SHS	NSRGY	STOCK
Sell	NIKE INC CL B	NKE	STOCK
Sell	PAPA JOHNS INTL INC	PZZA	STOCK
Sell	PEPSICO INC	PEP	STOCK

SHOE CARNIVAL INC	SCVL	STOCK
SHOIFY INC CL A	SHOP	STOCK
SHUTTERSTOCK INC	SSTK	STOCK
SIEMENS HEALTHINEERS AG UNSPON ADR	SMMNY	STOCK
SITIME CORP	SITM	STOCK
SNAP ON INC	SNA	STOCK
STANDEX INTL CORP	SXI	STOCK
STARBUCKS CORP	SBUX	STOCK
STIFEL FINANCIAL CORP	SF	STOCK
STRYKER CORP	SYK	STOCK
TAIWAN SEMICONDUCTOR MANUFACTURING CO LTD SPON ADR	TSM	STOCK
TARGET CORP	TGT	STOCK
TERRENO REALTY CORP	TRNO	STOCK
TESLA INC	TSLA	STOCK
TETRA TECH INC	TTEK	STOCK
THERMO FISHER SCIENTIFIC INC	TMO	STOCK
TRANSMEDICS GROUP INC	TMDX	STOCK
TRAVEL LEISURE CO	TNL	STOCK
TREX CO INC	TREX	STOCK
TRIMBLE INC	TRMB	STOCK
U S BANCORP DE	USB	STOCK
U S PHYSICAL THERAPY INC	USPH	STOCK
UBER TECHNOLOGIES INC	UBER	STOCK
UFP INDUSTRIES INC	UFPI	STOCK
ULTA BEAUTY INC	ULTA	STOCK
UMH PROPERTIES INC	UMH	STOCK
UNIFIRST CORP	UNF	STOCK
UNION PACIFIC CORP	UNP	STOCK
UNITEDHEALTH GROUP INC	UNH	STOCK
UNIVERSAL DISPLAY CORP	OLED	STOCK
UTZ BRANDS INC CL A	UTZ	STOCK
VALMONT INDUSTRIES INC	VMI	STOCK
VERIZON COMMUNICATIONS INC	VZ	STOCK
VISA INC CL A	V	STOCK
WABTEC	WAB	STOCK
WEBSTER FINANCIAL CORP WATERBURY CT	WBS	STOCK
WEC ENERGY GROUP INC	WEC	STOCK
WINGSTOP INC	WING	STOCK
WINMARK CORP	WINA	STOCK
WORKDAY INC CL A	WDAY	STOCK
WYNDHAM HOTELS & RESORTS INC	WH	STOCK
YETI HOLDINGS INC	YETI	STOCK
ZOETIS INC CL A	ZTS	STOCK

Sell	SOLAREEDGE TECHNOLOGI INC	SEDG	STOCK
Sell	SONOCO PRODUCTS CO	SON	STOCK
Sell	SPDR BLOOMBERG 1-3 MONTH T-BILL ETF NEW	BIL	STOCK
Sell	SPLUNK INC	SPLK	STOCK
Sell	STEVANATO GROUP S P USD	STVN	STOCK
Sell	TRACTOR SUPPLY CO	TSCO	STOCK
Sell	UNITED PARCEL SERVIC INC CL B	UPS	STOCK
Sell	WOLFSPEED INC	WOLF	STOCK

HAND DELIVERED

LEGISLATIVE RESOURCE CENTER

Date Received by Office of
the Clerk

2025 JUN 17 PM 1:32

Page Number

1

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES**FINANCIAL DISCLOSURE REPORT**
Office of Congressional Conduct
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

Lorraine C. Miller

Date (mm/dd/yy)

June 16, 2025

OCC Financial Disclosure Form

Name (Print last, first, middle initial) MILLER, LORRAINE C	Page Number 2
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Part I: Assets and Income

Report for Yourself, Spouse, and Dependent Child: - 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)	Do Not Report: - 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: 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	Do Not Report: - 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	☐

OCC Financial Disclosure Form

Name (Print last, first, middle initial) MILLER, LORRAINE C	Page Number 3
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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 <i>not applicable</i>	☐
2	☐
3	☐
4	☐
5	☐
6	☐
7	☐
8	☐
9	☐
10	☐
11	☐
12	☐
13	☐
14	☐
15	☐
16	☐
17	☐
18	☐
19	☐
20	☐

OCC Financial Disclosure Form

Name (Print last, first, middle initial) MILLER, LORRAINE C	Page Number 4
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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 <i>not applicable</i>	
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OCC Financial Disclosure Form

Name (Print last, first, middle initial) MILLER, LORRAINE C	Page Number 5
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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 - 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 Trustees	☐
2 Development Corporation of Tarrant County - Fort Worth, Texas	Affordable Housing Corp.	Board member	☐
3 Historic Broadside Neighborhood Association Fort Worth, Texas	Neighborhood ass.	Member	☐
4 Fort Worth Metropolitan Black Chamber of Commerce - Fort Worth, TX	Economic Development	Member	☐
5 FT. WORTH TARRANT COUNTY NAACP - FORT WORTH, TX	CIVIL RIGHTS ORGANIZATION	EX COMMITTEE MEMBER	☒
6			☐
7			☐
8			☐
9			☐
10			☐

OCC Financial Disclosure Form

Name (Print last, first, middle initial) MILLER, LORRAINE C	Page Number 6
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Part IV: Agreements or Arrangements

Report Your Agreements or Arrangements for: - 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)	Do Not Report: - 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
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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 <i>Not applicable</i>	
2	
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OCC Financial Disclosure Form

Name (Print last, first, middle initial) MILLER, LORRAINE C	Page Number 7
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Part V: Gifts and Travel Reimbursements

Report for Yourself, Spouse, and Dependent Child: - 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: - Determine the value of each item you received from that source - Ignore each item valued at \$192 or less - 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	Do Not Report: - 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
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Reportable Information – Go to the last page to see examples of how to report gifts and travel reimbursements.

Source	Description
1	<i>Not applicable</i>
2	
3	

OCC 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

HAND DELIVERED

Date Received by Office of
the ClerkPage Number
1OFFICE OF CONGRESSIONAL CONDUCT
U.S. HOUSE OF REPRESENTATIVES**FINANCIAL DISCLOSURE REPORT**
Office of Congressional Conduct
United States House of Representatives

Name (Print last, first, middle initial)

Lynn A Westmoreland

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

Lynn A Westmoreland

Date (mm/dd/yyyy)

6/16/2025

OCC Financial Disclosure Form

Name (Print last, first, middle initial)	Page Number 2
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Part I: Assets and Income

Report for Yourself, Spouse, and Dependent Child: - 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)	Do Not Report: - 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: 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	Do Not Report: - 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	☐

OCC Financial Disclosure Form

Name (Print last, first, middle initial) <i>Lynn A. Westrupelund</i>	Page Number <i>3</i>
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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	☐
3	☐
4	☐
5	☐
6	☐
7	☐
8	☐
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19	☐
20	☐

OCC Financial Disclosure Form

Name (Print last, first, middle initial) <i>LYNN A Westmoreland</i>	Page Number <i>4</i>
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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 Westmoreland Strategies	
2	
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OCC Financial Disclosure Form

Name (Print last, first, middle initial)	Page Number 5
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Part III: Outside Positions

Report for Yourself: - 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	Do Not Report: - 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 Westmonland Strategies LLC		Manager	☐
2			☐
3			☐
4			☐
5			☐
6			☐
7			☐
8			☐
9			☐
10			☐

OCC Financial Disclosure Form

Name (Print last, first, middle initial) <i>Lynn A. Westmoreland</i>	Page Number <i>6</i>
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Part IV: Agreements or Arrangements

Report Your Agreements or Arrangements for: - 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)	Do Not Report: - 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
<i>1 Georgia Legislative Retirement System</i>	<i>Defined Benefit</i>
<i>2</i>	
<i>3</i>	
<i>4</i>	
<i>5</i>	
<i>6</i>	
<i>7</i>	
<i>8</i>	
<i>9</i>	
<i>10</i>	

OCC Financial Disclosure Form

Name (Print last, first, middle initial)	Page Number
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Part V: Gifts and Travel Reimbursements

Report for Yourself, Spouse, and Dependent Child: - 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: - Determine the value of each item you received from that source - Ignore each item valued at \$192 or less - 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	Do Not Report: - 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
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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	

QCC 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
	☐
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	☐
	☐
	☐
	☐
	☐

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

