

**LOUISIANA BOARD OF ETHICS**

Mail: P.O. Box 4368, Baton Rouge, LA 70821

Fax: 225-381-7271

Upload: <https://eap.ethics.la.gov/FileUpload>

**(ANNUAL) TIER 2 PERSONAL FINANCIAL DISCLOSURE STATEMENT**

I currently hold an office that would require me to file a Tier 2.1, or Tier 3 Personal Financial Disclosure Statement. As such, I have completed SCHEDULE D.

ORIGINAL REPORT THIS REPORT COVERS CALENDAR YEAR 2023

AMENDED REPORT

FINAL REPORT WHERE TERM ENDS IN JANUARY (COVERING JANUARY 1 THROUGH JANUARY \_\_\_\_, \_\_\_\_)

A final report must be filed on or before May 15 of the year in which your service to that office ends. Refer to the "GENERAL INFORMATION" sheet of this form to determine eligibility.

OFFICE/POSITION HELD: BOSSIER CITY COUNCILMAN AT LARGE

NAME OF FILER (print full name): David A. Montgomery, Jr.

Mailing Address: 44 DUCK HAVEN POINTE

City, State, Zip: Bossier City, LA, 71111

NAME OF SPOUSE (if applicable) (printfull name): LISA T. MONTGOMERY

Spouse's Occupation: ABTRACTOR

Spouse's Principal Business Address: 333 TEXAS STREET

City, State, Zip: Shreveport, LA, 71101

**CHECK ALL THAT APPLY**

I have filed my state income tax return for the year listed above.

I have filed for an extension of my state income tax return for the year listed above.

I have filed my federal income tax return for the year listed above.

I have filed for an extension of my federal income tax return for the year listed above.

**CERTIFICATE OF ACCURACY**

I do hereby certify that the information contained in this personal financial disclosure statement is true and correct to the best of my knowledge, information, and belief.

**ELECTRONICALLY FILED**

E-FILE # PD-2047

DATE FILED: 4/27/2024

Signature of Filer

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## Schedule A: Employment Information

Check if not applicable

<p> <input checked="" type="checkbox"/> Filer    <input type="checkbox"/> Spouse                          <input checked="" type="checkbox"/> Full-Time    <input type="checkbox"/> Part-Time         </p> <p>Name of Employer: <u>MONTGOMERY AGENCY, INC</u></p> <p>Job Title: <u>CO-OWNER</u></p> <p>Job Description: <u>INSURANCE SALES</u></p>
<p> <input type="checkbox"/> Filer    <input checked="" type="checkbox"/> Spouse                          <input checked="" type="checkbox"/> Full-Time    <input type="checkbox"/> Part-Time         </p> <p>Name of Employer: <u>BLANCHARD, WALKER O'QUIN &amp; ROBERTS</u></p> <p>Job Title: <u>ABTRACTOR</u></p> <p>Job Description: <u>ABSTRACTOR TITLE</u></p>
<p> <input type="checkbox"/> Filer    <input type="checkbox"/> Spouse                          <input type="checkbox"/> Full-Time    <input type="checkbox"/> Part-Time         </p> <p>Name of Employer: _____</p> <p>Job Title: _____</p> <p>Job Description:</p>
<p> <input type="checkbox"/> Filer    <input type="checkbox"/> Spouse                          <input type="checkbox"/> Full-Time    <input type="checkbox"/> Part-Time         </p> <p>Name of Employer: _____</p> <p>Job Title: _____</p> <p>Job Description:</p>

- You are required to disclose employment information related to both you and your spouse (if applicable).
- List the name of the employer; the title of the position; a brief description of the job; and disclosure as to whether the position is full-time or part-time.
- Self-employment information is reported on Schedule B.

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Upload: <https://eap.ethics.la.gov/FileUpload>**SCHEDULE B: POSITIONS – BUSINESS** Check if not applicable

<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Amount of Interest: <u>  50  </u> % Name of Business: <u>MONTGOMERY AGENCY, INC.</u> Address: <u>1913 CITIZENS BANK DRIVE</u> City, State, Zip: <u>BOSSIER CITY, LA, 71111</u> Business Description: <u>INSURANCE AGENCY</u> Nature of Association: <u>SHAREHOLDER 50% AND EMPLOYEE</u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Amount of Interest: <u>  50  </u> % Name of Business: <u>BROTHERS VENTURE</u> Address: <u>44 Duck Haven Pt.</u> City, State, Zip: <u>Bossier City, LA, 71111</u> Business Description: <u>REAL ESTATE</u> Nature of Association: <u>50% OWNER - MEMBER</u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Amount of Interest: <u> 100 </u> % Name of Business: <u>David A. Montgomery , Jr. Insurance</u> Address: <u>44 Duck Haven Pt.</u> City, State, Zip: <u>Bossier City, LA, 71111</u> Business Description: <u>INSURANCE SALES AND BROKERAGE</u> Nature of Association: <u>SOLE PROPRIETORSHIP OWNER 100%</u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Amount of Interest: <u> 100 </u> % Name of Business: <u>FRENCHY'S LLC</u> Address: <u>44 Duck Haven Pt.</u> City, State, Zip: <u>Bossier City, LA, 71111</u> Business Description: <u>REAL ESTATE</u> Nature of Association: <u>100% OWNER MEMBER</u>

\* You are required to complete SCHEDULE B if you or your spouse is a director, officer, stockholder, owner, partner, member, or trustee of a business AND if you or your spouse (either individually or collectively) owns an interest in a business which exceeds 10%.

\* "Business" means any corporation, partnership, limited liability company, sole proprietorship, firm, enterprise, franchise, association, business, organization, self-employed individual, holding company, trust, or any other legal entity or person.

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Amount of Interest: <u>  33  </u> % Name of Business: <u> MONTGOMERY FARMS, LLC </u> Address: <u> 44 Duck Haven Pt. </u> City, State, Zip: <u> Bossier City, LA, 71111 </u> Business Description: <u> FARMING </u> Nature of Association: <u> 33% OWNER MEMBER </u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Amount of Interest: <u>  33  </u> % Name of Business: <u> DREMM, LLC </u> Address: <u> 44 Duck Haven Pt. </u> City, State, Zip: <u> Bossier City, LA, 71111 </u> Business Description: <u> INVESTMENTS BANK STOCK AND REAL ESTATE </u> Nature of Association: <u> 33% OWNER MEMBER </u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Amount of Interest: <u>  17  </u> % Name of Business: <u> MONTGOMERY INTEREST, LLC </u> Address: <u> 44 Duck Haven Pt. </u> City, State, Zip: <u> Bossier City, LA, 71111 </u> Business Description: <u> REAL ESTATE </u> Nature of Association: <u> 16.67% OWNER MEMBER </u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Amount of Interest: <u>  33  </u> % Name of Business: <u> D &amp; L , LLC </u> Address: <u> 44 Duck Haven Pt. </u> City, State, Zip: <u> Bossier City, LA, 71111 </u> Business Description: <u> RENTAL REAL ESTATE </u> Nature of Association: <u> 33% OWNER MEMBER </u>

\* You are required to complete SCHEDULE B if you or your spouse is a director, officer, stockholder, owner, partner, member, or trustee of a business AND if you or your spouse (either individually or collectively) owns an interest in a business which exceeds 10%.

\* "Business" means any corporation, partnership, limited liability company, sole proprietorship, firm, enterprise, franchise, association, business, organization, self-employed individual, holding company, trust, or any other legal entity or person.

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## Schedule C: Positions – Nonprofit

Check if not applicable

Filer    Spouse

Name of Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Nature of Association: \_\_\_\_\_

Description of Organization: \_\_\_\_\_

Filer    Spouse

Name of Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Nature of Association: \_\_\_\_\_

Description of Organization: \_\_\_\_\_

Filer    Spouse

Name of Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Nature of Association: \_\_\_\_\_

Description of Organization: \_\_\_\_\_

Filer    Spouse

Name of Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Nature of Association: \_\_\_\_\_

Description of Organization: \_\_\_\_\_

**\*You are required to complete SCHEDULE C if you or your spouse is a director or officer of a nonprofit organization.**

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**Schedule D: Other Offices/Positions Held**

Check if not applicable

Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____
Name of Office/Position: _____

**\*You are required to complete SCHEDULE D if you hold any other office or position which would require you to file a personal financial disclosure statement under La. R.S. 42:1124.2.1 or 42:1124.3.**

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Upload: <https://eap.ethics.la.gov/FileUpload>**Schedule E: Immovable Property****(where the value of the interest in the parcel exceeds \$2,000)** Check if not applicable Filer  Spouse  Both

Location of Property:

State: Louisiana Parish/County: BOSSIERDescription of Property: 4 ACRES REAL ESTATE, 1761 SWAN LAKE ROAD BOSSIER CITY LA 71111

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000) Filer  Spouse  Both

Location of Property:

State: Louisiana Parish/County: BOSSIERDescription of Property: OFFICE BUILDING 1913 CITIZENS BANK DR. BOSSIER CITY LA 71111

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000) Filer  Spouse  Both

Location of Property:

State: Louisiana Parish/County: BOSSIERDescription of Property: RESIDENCE 44 DUCK HAVEN POINTE BOSSIER CITY LA 71111

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000) Filer  Spouse  Both

Location of Property:

State: Louisiana Parish/County: BOSSIERDescription of Property: REAL ESTATE 110 COUNTRY CLUB DRIVE BENTON LA 71006

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000)**\* You are required to disclose the location by state and parish/county.****\* You are required to provide a brief description of the immovable property and its fair market value or use value (determined by the assessor for purposes of ad valorem taxes.)**

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Location of Property:

State: Louisiana Parish/County: BOSSIERDescription of Property: REAL ESTATE 2407 W. BELLE HAVEN DR BOSSIER CITY LA 71111

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000) Filer  Spouse  Both

Location of Property:

State: Louisiana Parish/County: BOSSIERDescription of Property: REAL ESTATE 3406 FOXRUN CIRCLE HAUGHTON LA

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000) Filer  Spouse  Both

Location of Property:

State: Florida Parish/County: ESCAMBIADescription of Property: REAL ESTATE PENSACOLA BEACH FL

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000) Filer  Spouse  Both

Location of Property:

State: Louisiana Parish/County: WEBSTERDescription of Property: REAL ESTATE IN HEFLIN LA

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000)**\* You are required to disclose the location by state and parish/county.****\* You are required to provide a brief description of the immovable property and its fair market value or use value (determined by the assessor for purposes of ad valorem taxes.)**



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Location of Property:

State: Louisiana Parish/County: BOSSIERDescription of Property: RENT HOUSES (4) REAL ESTATE LOCATED IN BOSSIER PARISH

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000) Filer    Spouse    Both

Location of Property:

State: \_\_\_\_\_ Parish/County: \_\_\_\_\_

Description of Property: \_\_\_\_\_

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000) Filer    Spouse    Both

Location of Property:

State: \_\_\_\_\_ Parish/County: \_\_\_\_\_

Description of Property: \_\_\_\_\_

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000) Filer    Spouse    Both

Location of Property:

State: \_\_\_\_\_ Parish/County: \_\_\_\_\_

Description of Property: \_\_\_\_\_

Value of the Interest in the Parcel:

 Category I (less than \$5,000) Category II (\$5,000-\$24,999) Category III (\$25,000-\$100,000) Category IV (more than \$100,000)**\* You are required to disclose the location by state and parish/county.****\* You are required to provide a brief description of the immovable property and its fair market value or use value (determined by the assessor for purposes of ad valorem taxes.)**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Business (where amount of interest exceeds 10%) Type of Income: <input type="checkbox"/> State <input checked="" type="checkbox"/> Political Subdivision <input type="checkbox"/> Gaming Interest Name of Business (if applicable): <u>MONTGOMERY AGENCY, INC.</u> Name of Income Source: <u>BOSSIER PARISH POLICE JURY</u> Address: <u>204 BURT BLVD</u> City, State, Zip: <u>BENTON, LA, 71006</u> Amount of Income (exact dollar amount): \$ <u>44,404.00</u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Business (where amount of interest exceeds 10%) Type of Income: <input type="checkbox"/> State <input checked="" type="checkbox"/> Political Subdivision <input type="checkbox"/> Gaming Interest Name of Business (if applicable): <u>MONTGOMERY AGENCY, INC.</u> Name of Income Source: <u>CADDO-BOSSIER PORT COMMISSION</u> Address: <u>10397 HIGHWAY 1</u> City, State, Zip: <u>SHREVEPORT, LA, 71115</u> Amount of Income (exact dollar amount): \$ <u>49,550.00</u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Business (where amount of interest exceeds 10%) Type of Income: <input type="checkbox"/> State <input checked="" type="checkbox"/> Political Subdivision <input type="checkbox"/> Gaming Interest Name of Business (if applicable): <u>David A. Montgomery, Jr. Insurance</u> Name of Income Source: <u>CADDO-BOSSIER PORT COMMISSION</u> Address: <u>10397 HIGHWAY 1</u> City, State, Zip: <u>SHREVEPORT, LA, 71115</u> Amount of Income (exact dollar amount): \$ <u>16,365.00</u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Business (where amount of interest exceeds 10%) Type of Income: <input type="checkbox"/> State <input checked="" type="checkbox"/> Political Subdivision <input type="checkbox"/> Gaming Interest Name of Business (if applicable): <u>MONTGOMERY AGENCY, INC.</u> Name of Income Source: <u>CONS-WATERWORKS SEWERAGE DIST BOSSIER</u> Address: <u>204 BURT BLVD</u> City, State, Zip: <u>BENTON, LA, 71006</u> Amount of Income (exact dollar amount): \$ <u>8,140.00</u>

\* You are required to complete SCHEDULE F if you or your spouse received income (includes any income from public source such as employment income, retirement, etc.) from the State, any political subdivision, and/or a gaming interest OR if a business in which you or your spouse owns an interest which exceeds 10% (either individually or collectively) received income from the aforementioned sources.

\* "Income" (for a business) means gross income less costs of goods sold, and operating expenses.

\* "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.

\* The definitions for (and examples of) *political subdivision, gaming interest, and business* are found in the *Instructions Section* of this form.

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Business (where amount of interest exceeds 10%) Type of Income: <input type="checkbox"/> State <input checked="" type="checkbox"/> Political Subdivision <input type="checkbox"/> Gaming Interest Name of Business (if applicable): <u>MONTGOMERY AGENCY, INC.</u> Name of Income Source: <u>BOSSIER PARISH SHERIFF</u> Address: <u>204 BURT BLVD</u> City, State, Zip: <u>BENTON, LA, 71006</u> Amount of Income (exact dollar amount): \$ <u>66,283.00</u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Business (where amount of interest exceeds 10%) Type of Income: <input type="checkbox"/> State <input checked="" type="checkbox"/> Political Subdivision <input type="checkbox"/> Gaming Interest Name of Business (if applicable): _____ Name of Income Source: <u>CITY OF BOSSIER CITY W-2 COUNCILMAN</u> Address: <u>620 BENTON ROAD</u> City, State, Zip: <u>BOSSIER CITY, LA, 71111</u> Amount of Income (exact dollar amount): \$ <u>10,200.00</u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Business (where amount of interest exceeds 10%) Type of Income: <input type="checkbox"/> State <input checked="" type="checkbox"/> Political Subdivision <input type="checkbox"/> Gaming Interest Name of Business (if applicable): <u>MONTGOMERY AGENCY, INC.</u> Name of Income Source: <u>SPORT-BOSSIER CONVENTION &amp; TOURIST BUREAU</u> Address: <u>P. O. BOX 1761</u> City, State, Zip: <u>SHREVEPORT, LA, 71166</u> Amount of Income (exact dollar amount): \$ <u>8,270.00</u>
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Business (where amount of interest exceeds 10%) Type of Income: <input type="checkbox"/> State <input checked="" type="checkbox"/> Political Subdivision <input type="checkbox"/> Gaming Interest Name of Business (if applicable): <u>MONTGOMERY AGENCY, INC.</u> Name of Income Source: <u>26TH JUDICIAL DISTRICT COURT</u> Address: <u>204 BURT BLVD</u> City, State, Zip: <u>BENTON, LA, 71006</u> Amount of Income (exact dollar amount): \$ <u>17.00</u>

\* You are required to complete SCHEDULE F if you or your spouse received income (includes any income from public source such as employment income, retirement, etc.) from the State, any political subdivision, and/or a gaming interest OR if a business in which you or your spouse owns an interest which exceeds 10% (either individually or collectively) received income from the aforementioned sources.

\* "Income" (for a business) means gross income less costs of goods sold, and operating expenses.

\* "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.

\* The definitions for (and examples of) *political subdivision, gaming interest, and business* are found in the *Instructions Section* of this form.

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**Schedule F: Filer/Spouse Income from the State, Political Subdivisions, and/or Gaming Interests**

Check if not applicable

Filer    Spouse    Business (where amount of interest exceeds 10%)  
 Type of Income:    State    Political Subdivision    Gaming Interest  
 Name of Business (if applicable): MONTGOMERY AGENCY, INC.  
 Name of Income Source: CYPRESS BLACK BAYOU REC & WATER CONS DISTRICT  
 Address: 135 CYPRESS PARK DR  
 City, State, Zip: BENTON, LA, 71006  
 Amount of Income (exact dollar amount): \$ 9,284.00

Filer    Spouse    Business (where amount of interest exceeds 10%)  
 Type of Income:    State    Political Subdivision    Gaming Interest  
 Name of Business (if applicable): \_\_\_\_\_  
 Name of Income Source: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Amount of Income (exact dollar amount): \$ \_\_\_\_\_

Filer    Spouse    Business (where amount of interest exceeds 10%)  
 Type of Income:    State    Political Subdivision    Gaming Interest  
 Name of Business (if applicable): \_\_\_\_\_  
 Name of Income Source: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Amount of Income (exact dollar amount): \$ \_\_\_\_\_

Filer    Spouse    Business (where amount of interest exceeds 10%)  
 Type of Income:    State    Political Subdivision    Gaming Interest  
 Name of Business (if applicable): \_\_\_\_\_  
 Name of Income Source: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Amount of Income (exact dollar amount): \$ \_\_\_\_\_

\* You are required to complete SCHEDULE F if you or your spouse received income (includes any income from public source such as employment income, retirement, etc.) from the State, any political subdivision, and/or a gaming interest OR if a business in which you or your spouse owns an interest which exceeds 10% (either individually or collectively) received income from the aforementioned sources.

\* "Income" (for a business) means gross income less costs of goods sold, and operating expenses.

\* "Income" (for an individual) mean taxable income and shall not include any income received pursuant to a life insurance policy.

\* The definitions for (and examples of) *political subdivision, gaming interest, and business* are found in the *Instructions Section* of this form.

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Upload: <https://eap.ethics.la.gov/FileUpload>**Schedule G: Income Received from Employment** Check if not applicable Filer  Spouse  Full-time  Part-timeName of Employer: MONTGOMERY AGENCY, INC.Address: 1913 CITIZENS BANK DRIVECity, State, Zip: BOSSIER CITY, LA, 71111Nature of Services (pursuant to such employment): INSURANCE SALES - CO-OWNERAmount of Income:  Category I (less than \$5,000)  Category II (\$5,000-\$24,999)  
 Category III (\$25,000-\$100,000)  Category IV (more than \$100,000) Filer  Spouse  Full-time  Part-timeName of Employer: BLANCHARD, WALKER O'QUIN & ROBERTSAddress: 333 TEXAS STREETCity, State, Zip: SHREVEPORT, LA, 71101Nature of Services (pursuant to such employment): TITLE SEARCHAmount of Income:  Category I (less than \$5,000)  Category II (\$5,000-\$24,999)  
 Category III (\$25,000-\$100,000)  Category IV (more than \$100,000) Filer  Spouse  Full-time  Part-time

Name of Employer: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Nature of Services (pursuant to such employment): \_\_\_\_\_

Amount of Income:  Category I (less than \$5,000)  Category II (\$5,000-\$24,999)  
 Category III (\$25,000-\$100,000)  Category IV (more than \$100,000) Filer  Spouse  Full-time  Part-time

Name of Employer: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Nature of Services (pursuant to such employment): \_\_\_\_\_

Amount of Income:  Category I (less than \$5,000)  Category II (\$5,000-\$24,999)  
 Category III (\$25,000-\$100,000)  Category IV (more than \$100,000)

\* You are required to complete SCHEDULE G to disclose the income received by you or your spouse for each full-time or part-time employment position held.

\* "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.

\* Income that is reported on SCHEDULE F does not have to be restated on SCHEDULE G.

\* Income received through *self-employment* is reported on SCHEDULE H, unless it is reported on Schedule F.

**LOUISIANA BOARD OF ETHICS**

Mail: P.O. Box 4368, Baton Rouge, LA 70821

Fax: 225-381-7271

Upload: <https://eap.ethics.la.gov/FileUpload>

**Schedule H: Income Received From Business**

Check if not applicable

**AGGREGATE AMOUNT OF INCOME RECEIVED FROM BUSINESS:**

Category I (less than \$5,000)

Category II (\$5,000-\$24,999)

Category III (\$25,000-\$100,000)

Category IV (more than \$100,000)

Filer  Spouse

Name of Business: BROTHERS VENTURE

Address: 44 Duck Haven Pt.

City, State, Zip: Bossier City, LA, 71111

Nature of services rendered or reason income was received:

REAL ESTATE

Filer  Spouse

Name of Business: David A. Montgomery , Jr. Insurance

Address: 44 Duck Haven Pt.

City, State, Zip: Bossier City, LA, 71111

Nature of services rendered or reason income was received:

INSURANCE SALES & BROKERAGE

Filer  Spouse

Name of Business: BUSDINESS FIRST BANKSHARES INC

Address: 500 LAUREL STREET, STE 101

City, State, Zip: BATON ROUGE, LA, 70801

Nature of services rendered or reason income was received:

MEMBER OF BOARD OF DIRECTORS

**\* You are required to complete SCHEDULE H if you or your spouse received income from a business.**

**\* "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.**

**\* Income reported on SCHEDULE F or G does not have to be restated on SCHEDULE H.**

**\* Income received through *self-employment* is reported on SCHEDULE H.**

**\* "Business" means any corporation, partnership, limited liability company, sole proprietorship, firm, enterprise, franchise, association, business, organization, self-employed individual, holding company, trust, or any other legal entity or person.**

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Check if not applicable

**AGGREGATE AMOUNT OF INCOME RECEIVED FROM BUSINESS:**

Category I (less than \$5,000)

Category II (\$5,000-\$24,999)

Category III (\$25,000-\$100,000)

Category IV (more than \$100,000)

Filer    Spouse

Name of Business: MONTGOMERY AGENCY, INC.

Address: 1913 CITIZENS BANK DRIVE

City, State, Zip: BOSSIER CITY, LA, 71111

Nature of services rendered or reason income was received:

INSURANCE SALES

Filer    Spouse

Name of Business: FRENCHY'S LLC

Address: 44 Duck Haven Pt.

City, State, Zip: Bossier City, LA, 71111

Nature of services rendered or reason income was received:

RENT INCOME

Filer    Spouse

Name of Business: D & L , LLC

Address: 44 Duck Haven Pt.

City, State, Zip: Bossier City, LA, 71111

Nature of services rendered or reason income was received:

RENT INCOME

**\* You are required to complete SCHEDULE H if you or your spouse received income from a business.**

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**\* Income reported on SCHEDULE F or G does not have to be restated on SCHEDULE H.**

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**Schedule I: Other Income** (any other income that exceeds \$1,000)

Check if not applicable

<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse Description of Income: INTEREST & DIVIDENDS FROM INVESTMENTS Nature of services rendered or reason income was received: INVESTMENT INCOME Amount of Income: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input checked="" type="checkbox"/> Category IV (more than \$100,000)
<input type="checkbox"/> Filer <input checked="" type="checkbox"/> Spouse Description of Income: INTEREST & DIVIDENDS FROM INVESTMENTS Nature of services rendered or reason income was received: INVESTMENT INCOME Amount of Income: <input checked="" type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input type="checkbox"/> Filer <input type="checkbox"/> Spouse Description of Income:  Nature of services rendered or reason income was received:  Amount of Income: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE I if you or your spouse received any other type of income (includes any income from private source such as rental income, federal retirement, etc.) that exceeded \$1,000.**

**\* "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.**

**\* You are not required to report income that is derived from child support and alimony payments contained in a court order, or from disability payments from any source.**

**\* Income that is reported on SCHEDULE F, G, or H does not have to be restated on SCHEDULE I.**

**\* Income from retirement accounts not reported on Schedule F should be included on Schedule I.**



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STOCK Filer  Spouse  BothName of Security: ABBVIE, INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: APPLE, INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: BROADCOM INCDescription of Security:  
STOCK

\* You are required to complete SCHEDULE J if you or your spouse holds investment securities where each investment security has a value that exceeds \$5,000.

\* You are not required to disclose variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, and cash/cash equivalent investments.

\* You are not required to disclose information concerning any property held and administered for any person other than you or your spouse under a trust, tutorship, curatorship, or other custodial instrument.

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STOCK Filer    Spouse    BothName of Security: CHEVRON CORPDescription of Security:  
STOCK Filer    Spouse    BothName of Security: CISCO SYSTEMS INCDescription of Security:  
STOCK Filer    Spouse    BothName of Security: CONOCOPHILLIPSDescription of Security:  
STOCK

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STOCK Filer    Spouse    BothName of Security: IBMDescription of Security:  
STOCK Filer    Spouse    BothName of Security: JPMORGAN CHASE & COMPANYDescription of Security:  
STOCK Filer    Spouse    BothName of Security: ELI LILLY % COMPANYDescription of Security:  
STOCK

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STOCK Filer  Spouse  BothName of Security: NOVO-NORDISKDescription of Security:  
STOCK Filer  Spouse  BothName of Security: OCCIDENTAL PETE CORPDescription of Security:  
STOCK Filer  Spouse  BothName of Security: PEPSICO INCDescription of Security:  
STOCK

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Upload: <https://eap.ethics.la.gov/FileUpload>**Schedule J: Investment Holdings** (an investment holding that exceeds \$5,000) Check if not applicable Filer  Spouse  BothName of Security: PHILLIPS 66Description of Security:  
STOCK Filer  Spouse  BothName of Security: CHUBB LIMITEDDescription of Security:  
STOCK Filer  Spouse  BothName of Security: FT CBOE VEST US EQUITY ETFDescription of Security:  
ETF Filer  Spouse  BothName of Security: ALPHABET INCDescription of Security:  
STOCK

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**Schedule J: Investment Holdings** (an investment holding that exceeds \$5,000)

Check if not applicable

<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  AMAZON COM INC  </u>  Description of Security: STOCK
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  APPLIED MATLS INC  </u>  Description of Security: STOCK
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  BLACKSTONE INC  </u>  Description of Security: STOCK
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  DOW INC  </u>  Description of Security: STOCK

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STOCK Filer    Spouse    BothName of Security: LOWES COMPANIES INCDescription of Security:  
STOCK Filer    Spouse    BothName of Security: MARATHON PETE CORPDescription of Security:  
STOCK Filer    Spouse    BothName of Security: MASTERCARD INCDescription of Security:  
STOCK

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**Schedule J: Investment Holdings** (an investment holding that exceeds \$5,000)

Check if not applicable

<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  MICROSOFT CORP  </u>  Description of Security: STOCK
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  NETFLIX INC  </u>  Description of Security: STOCK
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  NVIDIA CORP  </u>  Description of Security: STOCK
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  OKTA INC  </u>  Description of Security: STOCK

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STOCK Filer  Spouse  BothName of Security: SOUTHERN COMPANYDescription of Security:  
STOCK Filer  Spouse  BothName of Security: UNITED PARCEL SERVICE INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: VERTEX PHARMACEUTICALS INCDescription of Security:  
STOCK

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STOCK Filer  Spouse  BothName of Security: WALMART INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: WASTE MANAGEMENT INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: WILLIAMS COMPANIESDescription of Security:  
STOCK

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REIT Filer    Spouse    BothName of Security: ENTERPRISE PRODUCTS PARTNERS LPDescription of Security:  
PUBLICLY TRADED PARTNERSHIPS Filer    Spouse    BothName of Security: US TREASURY BILLSDescription of Security:  
TREASURY BILLS Filer    Spouse    BothName of Security: ADVANCED MICRO DEVICES INCDescription of Security:  
STOCK

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STOCK Filer  Spouse  BothName of Security: APOLLO GLOBAL MGMT INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: BERKSHIRE HATHAWAY INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: META PLATFORMS INCDescription of Security:  
STOCK

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**Schedule J: Investment Holdings** (an investment holding that exceeds \$5,000)

Check if not applicable

<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>LULULEMON ATHLETICA INC</u>  Description of Security: STOCK
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>PIONEER NAT RES COMPANY</u>  Description of Security: STOCK
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>RTX CORP</u>  Description of Security: STOCK
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>TEXTRON INC</u>  Description of Security: STOCK

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**Schedule J: Investment Holdings** (an investment holding that exceeds \$5,000)

Check if not applicable

<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  WORKDAY INC  </u>  Description of Security: STOCK
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  FIRST TRUST DORSEY WRIGHT ETF  </u>  Description of Security: ETF
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  SPDR GOLD SHARES  </u>  Description of Security: GOLD SHARES
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Security: <u>  BUSINESS FIRST BANCSHARES INC  </u>  Description of Security: STOCK

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STOCK Filer  Spouse  BothName of Security: ABBVIE INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: AMERICAN TOWER CORPDescription of Security:  
STOCK Filer  Spouse  BothName of Security: APOLLO GLOBAL MGMTDescription of Security:  
STOCK

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STOCK Filer  Spouse  BothName of Security: CARLYLE GROUP INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: CISCO SYSTEMS INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: COCA COLA CODescription of Security:  
STOCK

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STOCK Filer  Spouse  BothName of Security: INTERNATIONAL BUSINESS MACHINEDescription of Security:  
STOCK Filer  Spouse  BothName of Security: JPMORGAN CHASE & COMPANYDescription of Security:  
STOCK Filer  Spouse  BothName of Security: JOHNSON & JOHNSONDescription of Security:  
STOCK

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**Schedule J: Investment Holdings** (an investment holding that exceeds \$5,000)

Check if not applicable

Filer    Spouse    Both

Name of Security: MCDONALDS CORP

Description of Security:  
STOCK

Filer    Spouse    Both

Name of Security: MERCK & COMPANY INC

Description of Security:  
STOCK

Filer    Spouse    Both

Name of Security: ORGANON & CO

Description of Security:  
STOCK

Filer    Spouse    Both

Name of Security: QUALCOMM INC

Description of Security:  
STOCK

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Fax: 225-381-7271

Upload: <https://eap.ethics.la.gov/FileUpload>**Schedule J: Investment Holdings** (an investment holding that exceeds \$5,000) Check if not applicable Filer  Spouse  BothName of Security: SOUTHERN CODescription of Security:  
STOCK Filer  Spouse  BothName of Security: UNITED PARCEL SERVICE INCDescription of Security:  
STOCK Filer  Spouse  BothName of Security: VERIZON COMMUNICATIONSDescription of Security:  
STOCK Filer  Spouse  BothName of Security: WASTE MANAGEMENT INCDescription of Security:  
STOCK

\* You are required to complete SCHEDULE J if you or your spouse holds investment securities where each investment security has a value that exceeds \$5,000.

\* You are not required to disclose variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, and cash/cash equivalent investments.

\* You are not required to disclose information concerning any property held and administered for any person other than you or your spouse under a trust, tutorship, curatorship, or other custodial instrument.

**LOUISIANA BOARD OF ETHICS**

Mail: P.O. Box 4368, Baton Rouge, LA 70821

Fax: 225-381-7271

Upload: <https://eap.ethics.la.gov/FileUpload>**Schedule K: Transactions** (a transaction that exceeds \$5,000) Check if not applicable

<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>February 24, 2023</u> Description of Transaction: SOLD STOCK INTEL CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK ALPHABET INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK AMAZON INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>February 2, 2023</u> Description of Transaction: SOLD STOCK CHENIERE ENERGY Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>February 2, 2023</u> Description of Transaction: SOLD STOCK CHEVRON Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>January 27, 2023</u> Description of Transaction: SOLD STOCK ISHARES Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>February 2, 2023</u> Description of Transaction: SOLD STOCK JOHNSON & JOHNSON Amount of Transaction: <input checked="" type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 10, 2023</u> Description of Transaction: SOLD STOCK MCDONALDS Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

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Upload: <https://eap.ethics.la.gov/FileUpload>**Schedule K: Transactions** (a transaction that exceeds \$5,000) Check if not applicable

<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOD STOCK MICROSOFT Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 23, 2023</u> Description of Transaction: SOLD STOCK MICROCHIP TECHNOLOGY Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK NORTHROP GRUMMAN Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>May 4, 2023</u> Description of Transaction: SOLD STOCK NUCOR CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>February 2, 2023</u> Description of Transaction: SOLD STOCK OCCIDENTAL PETE CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>February 2, 2023</u> Description of Transaction: SOLD STOCK PIONEER NAT RES COMP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 24, 2023</u> Description of Transaction: SOLD STOCK SCHLUMBERGER LIMITED Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK SPDR FINANCIAL Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>September 28, 2023</u> Description of Transaction: SOLD STOCK SERVICENOW INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK WALMART INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK CHUBB LIMITED Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK APPLE INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**



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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK NORTHROP GRUMMAN Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK WALMART INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK CHUBB LIMITED Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK ARCHER DANIELS MIDLAND Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 24, 2023</u> Description of Transaction: SOLD STOCK BAKER HUGHES CO Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>August 31, 2023</u> Description of Transaction: SOLD STOCK BAXTER INTERNATIONAL Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 15, 2023</u> Description of Transaction: SOLD STOCK BRISTOL-MYERS SQUIBB CO Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK CVS HEALTH CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>July 13, 2023</u> Description of Transaction: SOLD STOCK COCA COLA CO Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 5, 2023</u> Description of Transaction: SOLD STOCK FREEPORT-MCMORAN INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK GENERAL MLS INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK LOCKHEED MARTIN CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 23, 2023</u> Description of Transaction: SOLD STOCK MCDONALDS CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK MERCK & COMPANY Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>January 19, 2023</u> Description of Transaction: SOLD STOCK MICROSOFT CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK SHELL PLC SPON Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>May 2, 2023</u> Description of Transaction: SOLD STOCK SCHWAB CHARLES CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>January 19, 2023</u> Description of Transaction: SOLD STOCK SYNCHRONY FINANCIAL Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 5, 2023</u> Description of Transaction: SOLD STOCK TEXAS INSTRS INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input checked="" type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK WILLIAMS COMPANIES Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>July 21, 2023</u> Description of Transaction: SOLD STOCK APPLE INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>July 21, 2023</u> Description of Transaction: SOLD STOCK ARCHER DANIEL MIDLAND Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK AUTOMATIC DATA PROCESSING INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK CVS HEALTH INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>July 13, 2023</u> Description of Transaction: SOLD STOCK COCA COLA Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK EXXON MOBIL CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>July 21, 2023</u> Description of Transaction: SOLD STOCK EXXON MOBIL CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK LOCKHEED MARTIN CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>July 21, 2023</u> Description of Transaction: SOLD STOCK MARATHON PETE CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input checked="" type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK MCDONALDS CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK MERCK & COMPANY Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK PROCTER AND GAMBLE CO Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK TARGET CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK TEXAS INSTRS INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK VALERO ENERGY CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>July 21, 2023</u> Description of Transaction: SOLD STOCK VALERO ENERGY CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input checked="" type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK WILLIAMS COMPANIES INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK CAPITAL ONE FINL CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input checked="" type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK PRUDENTIAL FINL INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK REGIONS FINANCIAL CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK ZOETIS INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK AFLAC INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK ALPHABET INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK AMAZON COM INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK APPLIED MATLS INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 23, 2023</u> Description of Transaction: SOLD STOCK BIOGEN INCORPORATED Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>January 19, 2023</u> Description of Transaction: SOLD STOCK CVS HEALTH CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 31, 2023</u> Description of Transaction: SOLD STOCK CATERPILLAR INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>February 2, 2023</u> Description of Transaction: SOLD STOCK CHENIERE ENERGY INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>July 25, 2023</u> Description of Transaction: SOLD STOCK CHEVRON CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>December 13, 2023</u> Description of Transaction: SOLD STOCK CONOCOPHILLIPS Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 27, 2023</u> Description of Transaction: SOLD STOCK COSTCO WHOLESALE CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>August 23, 2023</u> Description of Transaction: SOLD STOCK DEXCOM INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 18, 2023</u> Description of Transaction: SOLD STOCK FISERV INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>February 3, 2023</u> Description of Transaction: SOLD STOCK GENERAL DYNAMICS CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>February 2, 2023</u> Description of Transaction: SOLD STOCK GENERAL MLS INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 13, 2023</u> Description of Transaction: SOLD STOCK HOME DEPOT INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>September 20, 2023</u> Description of Transaction: SOLD STOCK IQVIA HLDGS INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 14, 2023</u> Description of Transaction: SOLD STOCK JOHNSON & JOHNSON Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>September 27, 2023</u> Description of Transaction: SOLD STOCK LAM RESEARCH CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK ELI LILLY & CO Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>October 12, 2023</u> Description of Transaction: SOLD STOCK MCDONALDS CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>August 15, 2023</u> Description of Transaction: SOLD STOCK MERCK & cO Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>August 15, 2023</u> Description of Transaction: SOLD STOCK MICROSOFT CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**



**LOUISIANA BOARD OF ETHICS**

Mail: P.O. Box 4368, Baton Rouge, LA 70821

Fax: 225-381-7271

Upload: <https://eap.ethics.la.gov/FileUpload>**Schedule K: Transactions** (a transaction that exceeds \$5,000) Check if not applicable

<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>January 9, 2023</u> Description of Transaction: SOLD STOCK NEXTERA ENERGY INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>May 4, 2023</u> Description of Transaction: SOLD STOCK NUCOR CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>August 15, 2023</u> Description of Transaction: SOLD STOCK PALO ALTO NETWORKS INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 24, 2023</u> Description of Transaction: SOLD STOCK SCHLUMBERGER LIMITED Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>May 2, 2023</u> Description of Transaction: SOLD STOCK SCHWAB CHARLES CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK SPLUNK INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>August 4, 2023</u> Description of Transaction: SOLD STOCK T-MOBILE US INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>January 19, 2023</u> Description of Transaction: SOLD STOCK UNITEDHEALTH GROUP INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

**LOUISIANA BOARD OF ETHICS**

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Upload: <https://eap.ethics.la.gov/FileUpload>**Schedule K: Transactions** (a transaction that exceeds \$5,000) Check if not applicable

<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>December 13, 2023</u> Description of Transaction: SOLD STOCK VALERO ENERGY CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>August 15, 2023</u> Description of Transaction: SOLD STOCK WALMART INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK AT&T INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK AMERICAN TOWER CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 23, 2023</u> Description of Transaction: SOLD STOCK APPLE INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK BLACKROCK INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK BOEING CO Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK CARLYE GROUP INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK CHEVRON CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK WALT DISNEY CO Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>August 15, 2023</u> Description of Transaction: SOLD STOCK EXXON MOBIL CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK FEDEX CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK FIRST TRUST NYSE Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK FIRST TRUST NASDAQ Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK GENERAC HLDGS INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK IBM Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

**\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).**

**\* You are not required to report variable annuities, variable life insurance, variable universal life insurance, whole life insurance, any other life insurance product, mutual funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK INVESCO DWA Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input checked="" type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK PAYCHEX INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK QUALCOM INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>August 4, 2023</u> Description of Transaction: SOLD STOCK T-MOBLE INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>March 22, 2023</u> Description of Transaction: SOLD STOCK WALMART INC Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input checked="" type="checkbox"/> Category II (\$5,000-\$24,999) <input type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK EATON CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SOLD STOCK ENERGY TRANSFER Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)
<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Transaction Date: <u>June 30, 2023</u> Description of Transaction: SUNOCO FIN CORP Amount of Transaction: <input type="checkbox"/> Category I (less than \$5,000) <input type="checkbox"/> Category II (\$5,000-\$24,999) <input checked="" type="checkbox"/> Category III (\$25,000-\$100,000) <input type="checkbox"/> Category IV (more than \$100,000)

\* You are required to complete SCHEDULE K if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures (when the value of the transaction exceeded \$5,000 in the previous calendar year).

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**Schedule L: Liabilities** (a liability that exceeds \$10,000)

Check if not applicable

<input type="checkbox"/> Filer <input type="checkbox"/> Spouse Name of Creditor: _____ Address: _____ City, State, Zip: _____ Name of Guarantor (If applicable): _____
<input type="checkbox"/> Filer <input type="checkbox"/> Spouse Name of Creditor: _____ Address: _____ City, State, Zip: _____ Name of Guarantor (If applicable): _____
<input type="checkbox"/> Filer <input type="checkbox"/> Spouse Name of Creditor: _____ Address: _____ City, State, Zip: _____ Name of Guarantor (If applicable): _____

\* You are required to complete SCHEDULE L if you or your spouse owes any liability which exceeds \$10,000 on the last day of the reporting period.

\* You are not required to disclose any loan secured by movable property, if such loan does not exceed the purchase price of the movable property which secures the loan.

\* You are not required to disclose any liability, secured or unsecured, which is guaranteed by you or your spouse for a business in which you or your spouse owns any interest, provided that the liability is in the name of the business and, if the liability is a loan, that you or your spouse does not use proceeds from the loan for personal use unrelated to business.

\* You are not required to disclose any loan by a licensed financial institution which loans money in the ordinary course of business.

\* You are not required to disclose any liability resulting from a consumer credit transaction as defined in R.S. 9:3516(13).

\* You are not required to disclose any loan from an immediate family member, unless such family member is a registered lobbyist, or his principal or employer is a registered lobbyist, or he employs or is a principal of a registered lobbyist, or unless such family member has a contract with the State.

\* "Consumer Credit Transaction" in R.S. 9:3516(13) means a consumer loan or a consumer credit sale but does not include a motor vehicle credit transaction made pursuant to R.S. 6:969.1 et seq.

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**Schedule M: Positions – Business**

(to be completed by members of the Ethics Adjudicatory Board and Ethics Board,  
and the administrator of the Ethics Administration)

Check if not applicable

<input type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Business: _____ Address: _____ City, State, Zip: _____ Business Description: _____ _____ Nature of Association: _____ Amount of Interest: _____%
<input type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Business: _____ Address: _____ City, State, Zip: _____ Business Description: _____ _____ Nature of Association: _____ Amount of Interest: _____%
<input type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Business: _____ Address: _____ City, State, Zip: _____ Business Description: _____ _____ Nature of Association: _____ Amount of Interest: _____%
<input type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both Name of Business: _____ Address: _____ City, State, Zip: _____ Business Description: _____ _____ Nature of Association: _____ Amount of Interest: _____%

\* You are required to complete SCHEDULE M if you are a member of the Ethics Adjudicatory Board; a member of the Board of Ethics; or if you serve as administrator of the Ethics Administration.

\* You are required to disclose information related to ownership interest in a business *regardless of the percentage of ownership*.

\* "Business" means any corporation, partnership, sole proprietorship, firm, enterprise, franchise, association, business, organization, self-employed individual, holding company, trust, or any other legal entity or person.

\* Information disclosed on SCHEDULE B does not have to be restated on SCHEDULEM.

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**Schedule N: Income from the State and/or Political Subdivisions**

(to be completed by members of the Ethics Adjudicatory Board and Ethics Board,  
and the administrator of the Ethics Administration)

Check if not applicable

Filer    Spouse    Business  
 Type of Income:    State    Political Subdivision  
 Name of Business (if applicable): \_\_\_\_\_  
 Name of Income Source: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Amount of Income (exact dollar amount): \_\_\_\_\_

Filer    Spouse    Business  
 Type of Income:    State    Political Subdivision  
 Name of Business (if applicable): \_\_\_\_\_  
 Name of Income Source: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Amount of Income (exact dollar amount): \_\_\_\_\_

Filer    Spouse    Business  
 Type of Income:    State    Political Subdivision  
 Name of Business (if applicable): \_\_\_\_\_  
 Name of Income Source: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Amount of Income (exact dollar amount): \_\_\_\_\_

Filer    Spouse    Business  
 Type of Income:    State    Political Subdivision  
 Name of Business (if applicable): \_\_\_\_\_  
 Name of Income Source: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 Amount of Income (exact dollar amount): \_\_\_\_\_

\* You are required to complete SCHEDULE N if you are a member of the Ethics Adjudicatory Board; a member of the Board of Ethics; or if you serve as administrator of the Ethics Administration.

\* You are required to disclose all income received by a business in which you or your spouse received *regardless of the percentage of ownership in the business*.

\* "Income" (for a business) means gross income less costs of goods sold, and operating expenses.

\* "Income" (for an individual) means taxable income and shall not include any income received pursuant to a life insurance policy.

\* Information disclosed on SCHEDULE F does not have to be restated on SCHEDULE N.

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Fax: 225-381-7271

Upload: <https://eap.ethics.la.gov/FileUpload>

## Schedule O: Income from a Governmental Entity

(to be completed by members of the Ethics Adjudicatory Board and Ethics Board,  
and the administrator of the Ethics Administration)

Check if not applicable

<input type="checkbox"/> Filer <input type="checkbox"/> Spouse Name of Governmental Entity: _____ Nature of Contract/Sub-Contract:  Value (of thing of economic value) Derived: _____
<input type="checkbox"/> Filer <input type="checkbox"/> Spouse Name of Governmental Entity: _____ Nature of Contract/Sub-Contract:  Value (of thing of economic value) Derived: _____
<input type="checkbox"/> Filer <input type="checkbox"/> Spouse Name of Governmental Entity: _____ Nature of Contract/Sub-Contract:  Value (of thing of economic value) Derived: _____
<input type="checkbox"/> Filer <input type="checkbox"/> Spouse Name of Governmental Entity: _____ Nature of Contract/Sub-Contract:  Value (of thing of economic value) Derived: _____

**\* You are required to complete SCHEDULE O if you are a member of the Ethics Adjudicatory Board; a member of the Board of Ethics; or if you serve as administrator of the Ethics Administration.**

**\* You are required to disclose the name of each governmental entity from which you or your spouse derives a “thing of economic value” through a contract or subcontract involving a governmental entity, including the Louisiana Insurance Guaranty Association, the Louisiana Health Insurance Guaranty Association, Louisiana Citizens Property Insurance Corporation, the Property Insurance Association of Louisiana, and any other quasi-public entity.**

**\* You are required to disclose the nature of the contract or subcontract, and the value of the “thing of economic value” derived.**

**\* “Thing of Economic Value” means money or any other thing having economic value. The complete definition of “thing of economic value” can be found at La. R.S. 42:1102(22).**