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LOUISIANA BOARD OF ETHICS
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Fax: 225-381-7271
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(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 ☐, 20☐])

A final reports 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: State Representative District 72

NAME OF FILER (print full name): Robert J. Carter

Mailing Address : Po Box 27

City, State, Zip: Greensburg, La 70441

NAME OF SPOUSE(if applicable)(print full name): Kerry A. Carter

Spouse's Occupation: retired

Spouse's Principal Business Address:

City, State, Zip:

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.

Signature of Filer

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Schedule A: Employment Information

☐ Check if not applicable

☑ Filer ☐ Spouse ☑ Full-Time ☐ Part-Time
Name of Employer: Robert J. Carter PLC
Job Title: ATTORNEY-OWNER
Job Description:

☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time
Name of Employer:
Job Title:
Job Description:

☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time
Name of Employer:
Job Title:
Job Description:

☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time
Name of Employer:
Job Title:
Job Description:

☐ Filer ☐ Spouse ☐ Full-Time ☐ Part-Time
Name of Employer:
Job Title:
Job Description:

* **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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Schedule B: Positions - Business

☐ Check if not applicable

☑ Filer ☐ Spouse ☐ Both
Amount of Interest: 100 %
Name of Business: Carter ST, Helena LLC
Address: Po Box 27
City, State, Zip: Greensburg, La 70441
Business Description: Land Holding Co.
Nature of Association:

☑ Filer ☐ Spouse ☐ Both
Amount of Interest: 100 %
Name of Business: Carter Raiford LLC
Address: PoBox 27
City, State, Zip: Greensburg, La 70441
Business Description: Land Holding Co.
Nature of Association:

☑ Filer ☐ Spouse ☐ Both
Amount of Interest: 100 %
Name of Business: Carter Yazoo LLC
Address: PoBOX 27
City, State, Zip: Greensburg, La 70441
Business Description: Land Holding Co.
Nature of Association:

* **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 B: Positions - Business

☐ Check if not applicable

☒ Filer ☐ Spouse ☐ Both
Amount of Interest: 100 %
Name of Business: Carter Amite LLC
Address: PO Box 27
City, State, Zip: Greensburg, La 70441
Business Description: Land Holding Co.
Nature of Association:

☒ Filer ☐ Spouse ☐ Both
Amount of Interest: 100 %
Name of Business: Carter Justice Building LLC
Address: PO Box 27
City, State, Zip: Greensburg, La 70441
Business Description: Land Holding Co.
Nature of Association:

☐ Filer ☐ Spouse ☐ Both
Amount of Interest: %
Name of Business:
Address:
City, State, Zip:
Business Description:
Nature of Association:

* **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: Greensburg United Methodist Church

Address: PO Box 27

City, State, Zip: Greensburg, La 70441

Nature of Association: Chairman of Board

Description of Organization: religious

☐ 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: State Representative District 72
Name of Office/Position:
Name of Office/Position: Amite River Basin Commission
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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Schedule E: Immovable Property

☐ Check if not applicable **(where the value of the interest in the parcel exceeds $2,000)**

☐ 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)

See Spreadsheets attached

*** 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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Schedule F: 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): State Representative Dist. 72
Name of Income Source: State of Louisiana
Address: 900 N. 3rd Street
City, State, Zip: Baton Rouge, LA
Amount of Income (exact dollar amount): $ 32,500.00

☑ Filer ☐ Spouse ☐ Business(where amount of interest exceeds 10%)
Type of Income: ☐ State ☑ Political Subdivision ☐ Gaming Interest
Name of Business(if applicable): Carter Justice Building LLC
Name of Income Source: St. Helena Police Jurs/Council on Agings
Address: Hwy 43N
City, State, Zip: Greensburg, La 70441
Amount of Income (exact dollar amount): $ 54,000.00

☑ Filer ☐ Spouse ☐ Business(where amount of interest exceeds 10%)
Type of Income: ☐ State ☑ Political Subdivision ☐ Gaming Interest
Name of Business(if applicable): Self
Name of Income Source: St. Helena Council on Agings
Address: 53 S. Main
City, State, Zip: Greensburg, La 70441
Amount of Income (exact dollar amount): $ 9000.00

* **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 G: Income Received from Employment

☐ Check if not applicable

☑ Filer ☐ Spouse ☑ Full-time ☐ Part-time

Name of Employer: Robert J. Carter PLC

Address: PO Box 27

City, State, Zip: Greensburg, La 70441

Nature of services (pursuant to such employment): Attorney

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: State of Louisiana - State representative

Address: PO Box 27

City, State, Zip: Greensburg, La 70441

Nature of services (pursuant to such employment): State Representative

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.**

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Schedule H: Income Received From Business

☐ Check if not applicable Reported on Schedule F+G

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: _____

Address: _____

City, State, Zip: _____

Nature of services rendered or reason income was received: _____

☐ Filer ☐ Spouse

Name of Business: _____

Address: _____

City, State, Zip: _____

Nature of services rendered or reason income was received: _____

☐ Filer ☐ Spouse

Name of Business: _____

Address: _____

City, State, Zip: _____

Nature of services rendered or reason income was received: _____

☐ Filer ☐ Spouse

Name of Business: _____

Address: _____

City, State, Zip: _____

Nature of services rendered or reason income was received: _____

* **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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Schedule I: Other Income

☐ Check if not applicable **(any other income that exceeds $1,000)**

☑ Filer ☐ Spouse
Description of Income:

Oil Royalties, Leases, Cattle Sales, Cell Towers, Billboard, commercial & residential leases

Nature of services rendered or reason income was received:

From Land investments

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
Description of Income:

CD interest + stock dividends

Nature of services rendered or reason income was received:

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
Description of Income:

Nature of services rendered or reason income was received:

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 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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Schedule J: Investment Holdings

☐ Check if not applicable

(an investment holding that exceeds $5,000)

☑ Filer ☐ Spouse ☐ Both

Name of Security:

Boeing Stock

Description of Security:

Boeing Stock

☐ Filer ☐ Spouse ☐ Both

Name of Security:

Description of Security:

☐ Filer ☐ Spouse ☐ Both

Name of Security:

Description of Security:

* **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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Schedule K: Transactions

☐ Check if not applicable

(a transaction that exceeds $5,000)

☐ Filer ☐ Spouse ☑ Both

Transaction Date: 12-30-2023

Description of Transaction:

Donated land stock to children

Amount of Transaction: ☐ 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

Transaction Date: _____

Description of Transaction:

Amount of Transaction: ☐ 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

Transaction Date: _____

Description of Transaction:

Amount of Transaction: ☐ 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 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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Schedule L: Liabilities

☑ Check if not applicable

(a liability that exceeds $10,000)

☐ Filer ☐ Spouse

Name of Creditor: _____

Address: _____

City, State, Zip: _____

Name of Guarantor (If applicable): _____

☐ Filer ☐ Spouse

Name of Creditor: _____

Address: _____

City, State, Zip: _____

Name of Guarantor (If applicable): _____

☐ Filer ☐ Spouse

Name of Creditor: _____

Address: _____

City, State, Zip: _____

Name of Guarantor (If applicable): _____

☐ Filer ☐ 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.**

Filer/Spouse/Both	State	Parish
Filer	Louisiana	Tangipahoa Parish
Filer	Louisiana	Tangipahoa Parish
Filer	Louisiana	Tangipahoa Parish
Filer	Louisiana	Tangipahoa Parish
Filer + Spouse	Louisiana	Tangipahoa Parish
Filer	Louisiana	Tangipahoa Parish

Property Description	Category Value
1/4 Interest in 146 Acres - Section 46 & 47, T35 R7E	III
1/2 Interest in 406 Acres - Section 39, T35 R7E	III
Rental Building - Hwy 38 & 51, Kentwood	IV
33 Acres - I-55 Service Road	IV
Hwy 40 House in Independence	III
2 Building - 11 Acres, Section 6, T45 R7E	IV

Filer/Spouse/Both	State	Parish	Property Description
Filer	Louisiana	Livingston Parish	14.25 Acres - Section 10, T5s R6F
Filer	Louisiana	Livingston Parish	64 Acres - Section 47, T5s R6F
Filer	Louisiana	Livingston Parish	201 Acres - Section 48, T5s R6E
Filer	Louisiana	Livingston Parish	49.2 Acres - Section 22, T6s R5E

Filer/Spouse/Both	State	Parish	Property Description	Category Value
Filer	Louisiana	St. Helena Parish	123 Acres - Hwy 37 & Bull Springs Road	IV
Filer	Louisiana	St. Helena Parish	Office Building, 235 Main Street	IV
Filer	Louisiana	St. Helena Parish	Office Building, 535 Main Street	IV
Filer	Louisiana	St. Helena Parish	Office Building, 735 Main Street	IV
Filer	Louisiana	St. Helena Parish	160 Acres - Section 35, T25 R6E & HOUSE	IV
Filer	Louisiana	St. Helena Parish	12 Acres - Hwy 38	III
Filer	Louisiana	St. Helena Parish	442 Acres - Hwy 449, Pine Grove	IV
Filer	Louisiana	St. Helena Parish	33.48 Acres - Section 60, TY5 R6E	IV
Filer	Louisiana	St. Helena Parish	20 Acres - Section 11, TI5 R6E	IV
Filer	Louisiana	St. Helena Parish	65 - Lake Property & House, Section 63, T45 R4E	IV
Filer	Louisiana	St. Helena Parish	20.34 Acres - Section 11, TI5 R6E	IV
Filer	Louisiana	St. Helena Parish	57.74 Acres - Section 57, T35 R4E	IV
Filer	Louisiana	St. Helena Parish	997 Acres - Section 3, 39, 43, 61, & 62 T35 R5E, & House	IV
Filer	Louisiana	St. Helena Parish	80 Acres - Section 47, T35 R5E	IV
Filer	Louisiana	St. Helena Parish	24 Acres - Section 60, T35 R5E	IV
Filer	Louisiana	St. Helena Parish	313.24 Acres - Section 55 & 57, T25 R4E	IV
Filer	Louisiana	St. Helena Parish	81 Acres - Section 46 & 50, T35 R4E	IV
Filer	Louisiana	St. Helena Parish	3.83 Acres - Section 63 T25 R4E	IV
Filer	Louisiana	St. Helena Parish	2.61 Acres - Section 53, T35 R5E	IV
Filer	Louisiana	St. Helena Parish	30 Acres - Section 43 & 47, T35 R6E	III
Filer	Louisiana	St. Helena Parish	17.87 Acres - Section 54, TI5 R4E	III
Filer	Louisiana	St. Helena Parish	1/2 Interest in 450 Acres on Doughty Road	IV
Filer	Louisiana	St. Helena Parish	1/2 Interest in 350 Acres on Sarah Lane	IV
Filer	Louisiana	St. Helena Parish	1/2 Interest in 190 Acres on Hwy 43	IV
Filer	Louisiana	St. Helena Parish	59.74 Acres - Section 57, T35 R4E	IV
Filer	Louisiana	St. Helena Parish	26 Acres - Section 48, T4s R6E	IV
Filer	Louisiana	St. Helena Parish	11.17 Acres - Section 57, T45 R5E	IV
Filer	Louisiana	St. Helena Parish	11.75 Acres & House - Section 13, T25 R4E	IV
Filer	Louisiana	St. Helena Parish	11.17 Acres - Section 57, T45 R5E	IV
Filer	Louisiana	St. Helena Parish	230.5 Acres - Section 48, T45 R5E	IV
Filer	Louisiana	St. Helena Parish	135 Acres - Section 69, T45 R4E	IV
Filer	Louisiana	St. Helena Parish	460 Acres - Section 57,58, & 59, T3s R6E	IV
Filer	Louisiana	St. Helena Parish	161.64 Acres - Section 16, 39, & 61, T45 R6E	IV

Filer	Louisiana	St. Helena Parish	341.52 Acres - Section 9 & 57, T35 R6E	IV
Filer	Louisiana	St. Helena Parish	154 Acres - Section 58 & 59, T3s R6E	IV
Filer	Louisiana	St. Helena Parish	90.38 Acres & House - Section 35 & 37, T2s R5E	IV
Filer	Louisiana	St. Helena Parish	8 City Lots in Greenburg with Buildings	
Filer	Louisiana	St. Helena Parish	Lot 1 Church St + HWY 10	IV
Filer	Louisiana	St. Helena Parish	LOT 2 S. Main & College ST	III
Filer	Louisiana	St. Helena Parish	lot 3 S. Main + HWY 37	III
Filer	Louisiana	St. Helena Parish	lot 4 HWY 10 + HWY 37	IV
Filer	Louisiana	St. Helena Parish	lot 5 S. Main + Lafayette St	II
Filer	Louisiana	St. Helena Parish	lot 6 6439 HWY 10	III
Filer	Louisiana	St. Helena Parish	lot 7 6477 HWY 10	III
Filer	Louisiana	St. Helena Parish		

Filer/Spouse/Both	State	Parish	Property Description	Category Value
Filer	Louisiana	Livingston	89 Acres Section 47, T85 R6E	IV

Filer/Spouse/Both	State	County	Property Description	Category Value	
Filer	Mississippi	Pike County	100 Acres of Timberland	IV	
Filer	Mississippi	Yazoo County	Undivided/Intersecting Farmland	III	