

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 2024

☐ 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 LARGENAME OF FILER (print full name): David A. Montgomery, Jr.Mailing Address: 44 Duck Haven PointeCity, State, Zip: Bossier City, LA, 71111NAME OF SPOUSE (if applicable) (printfull name): LISA T. MONTGOMERYSpouse's Occupation: ABTRACTORSpouse's Principal Business Address: 333 TEXAS STREETCity, 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-2555

DATE FILED: 4/23/2025**Signature of Filer**

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Schedule A: Employment Information

☐ Check if not applicable

<div style="display: flex; justify-content: space-between;"><input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse<input checked="" type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time</div> <div>Name of Employer: <u>MONTGOMERY AGENCY, INC.</u></div> <div>Job Title: <u>Co-Owner</u></div> <div>Job Description: <u>Insurance Sales</u></div>
<div style="display: flex; justify-content: space-between;"><input type="checkbox"/> Filer <input checked="" type="checkbox"/> Spouse<input checked="" type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time</div> <div>Name of Employer: <u>BLANCHARD, WALKER O'QUIN & ROBERTS</u></div> <div>Job Title: <u>Abstractor</u></div> <div>Job Description: <u>Abstractor Title</u></div>
<div style="display: flex; justify-content: space-between;"><input type="checkbox"/> Filer <input type="checkbox"/> Spouse<input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time</div> <div>Name of Employer: _____</div> <div>Job Title: _____</div> <div>Job Description: _____</div>
<div style="display: flex; justify-content: space-between;"><input type="checkbox"/> Filer <input type="checkbox"/> Spouse<input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time</div> <div>Name of Employer: _____</div> <div>Job Title: _____</div> <div>Job Description: _____</div>

- 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☒ Filer ☐ Spouse ☐ BothAmount of Interest: 50.00 %Name of Business: MONTGOMERY AGENCY, INC.Address: 1913 CITIZENS BANK DRIVECity, State, Zip: BOSSIER CITY, LA, 71111Business Description: INSURANCE AGENCYNature of Association: SHAREHOLDER 50% AND EMPLOYEE☒ Filer ☐ Spouse ☐ BothAmount of Interest: 50.00 %Name of Business: BROTHERS VENTUREAddress: 44 Duck Haven Pt.City, State, Zip: Bossier City, LA, 71111Business Description: REAL ESTATENature of Association: 50% OWNER - MEMBER☒ Filer ☐ Spouse ☐ BothAmount of Interest: 100.00 %Name of Business: David A. Montgomery , Jr. InsuranceAddress: 44 Duck Haven Pt.City, State, Zip: Bossier City, LA, 71111Business Description: INSURANCE SALES AND BROKERAGENature of Association: SOLE PROPRIETORSHIP OWNER 100%☒ Filer ☐ Spouse ☐ BothAmount of Interest: 100.00 %Name of Business: FRENCHY'S LLCAddress: 44 Duck Haven Pt.City, State, Zip: Bossier City, LA, 71111Business Description: REAL ESTATENature of Association: 100% OWNER MEMBER

* 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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Upload: <https://eap.ethics.la.gov/FileUpload>**SCHEDULE B: POSITIONS – BUSINESS**☐ Check if not applicable☒ Filer ☐ Spouse ☐ BothAmount of Interest: 33.00 %Name of Business: MONTGOMERY FARMS, LLCAddress: 44 Duck Haven Pt.City, State, Zip: Bossier City, LA, 71111Business Description: FARMINGNature of Association: 33% OWNER MEMBER☒ Filer ☐ Spouse ☐ BothAmount of Interest: 33.00 %Name of Business: DREMM, LLCAddress: 44 Duck Haven Pt.City, State, Zip: Bossier City, LA, 71111Business Description: REAL ESTATENature of Association: 33% OWNER MEMBER☒ Filer ☐ Spouse ☐ BothAmount of Interest: 17.00 %Name of Business: MONTGOMERY INTEREST, LLCAddress: 44 Duck Haven Pt.City, State, Zip: Bossier City, LA, 71111Business Description: REAL ESTATENature of Association: 16.67% OWNER MEMBER☒ Filer ☐ Spouse ☐ BothAmount of Interest: 33.00 %Name of Business: D & L , LLCAddress: 44 Duck Haven Pt.City, State, Zip: Bossier City, LA, 71111Business Description: REAL ESTATENature of Association: 33% OWNER MEMBER

* 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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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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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 \$5,000)

☐ Check if not applicable☒ Filer ☐ Spouse ☐ Both

Location of Property:

State: Louisiana Parish/County: BOSSIERDescription of Property: 4 ACRES REALESTATE 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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(where the value of the interest in the parcel exceeds \$5,000)

☐ Check if not applicable☒ Filer ☐ Spouse ☐ Both

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: Louisiana 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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(where the value of the interest in the parcel exceeds \$5,000)

☐ Check if not applicable☒ Filer ☐ Spouse ☐ Both

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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Upload: <https://eap.ethics.la.gov/FileUpload>**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 InterestName of Business (if applicable): MONTGOMERY AGENCY, INC.Name of Income Source: BOSSIER PARISH POLICE JURYAddress: 204 BURT BLVDCity, State, Zip: BENTON, LA, 71006Amount of Income (exact dollar amount): \$ 48,844.00☒ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)Type of Income: ☐ State ☒ Political Subdivision ☐ Gaming InterestName of Business (if applicable): MONTGOMERY AGENCY, INC.Name of Income Source: CADDO-BOSSIER PORT COMMISSIONAddress: 10397 HIGHWAY 1City, State, Zip: Shreveport, LA, 71115Amount of Income (exact dollar amount): \$ 54,505.00☒ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)Type of Income: ☐ State ☒ Political Subdivision ☐ Gaming InterestName of Business (if applicable): David A. Montgomery, Jr. InsuranceName of Income Source: CADDO-BOSSIER PORT COMMISSIONAddress: 10397 HIGHWAY 1City, State, Zip: Shreveport, LA, 71115Amount of Income (exact dollar amount): \$ 18,001.00☒ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)Type of Income: ☐ State ☒ Political Subdivision ☐ Gaming InterestName of Business (if applicable): MONTGOMERY AGENCY, INC.Name of Income Source: CONS-WATERWORKS SEWERAGE DIST BOSSIERAddress: 204 BURT BLVDCity, State, Zip: BENTON, LA, 71006Amount of Income (exact dollar amount): \$ 8,954.00

* 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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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 InterestName of Business (if applicable): MONTGOMERY AGENCY, INC.Name of Income Source: BOSSIER PARISH SHERIFFAddress: 204 BURT BLVDCity, State, Zip: BENTON, LA, 71006Amount of Income (exact dollar amount): \$ 72,911.00☒ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)Type of Income: ☐ State ☒ Political Subdivision ☐ Gaming InterestName of Business (if applicable): MONTGOMERY AGENCY, INC.Name of Income Source: SPORT-BOSSIER CONVENTION & TOURIST BUREAUAddress: P. O. BOX 1761City, State, Zip: Shreveport, LA, 71166Amount of Income (exact dollar amount): \$ 9,097.00☒ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)Type of Income: ☐ State ☒ Political Subdivision ☐ Gaming InterestName of Business (if applicable): MONTGOMERY AGENCY, INC.Name of Income Source: 26TH JUDICIAL DISTRICT COURTAddress: 204 BURT BLVDCity, State, Zip: BENTON, LA, 71006Amount of Income (exact dollar amount): \$ 19.00☒ Filer ☐ Spouse ☐ Business (where amount of interest exceeds 10%)Type of Income: ☐ State ☒ Political Subdivision ☐ Gaming InterestName of Business (if applicable): MONTGOMERY AGENCY, INC.Name of Income Source: CYPRESS BLACK BAYOU REC & WATER CONS DISTRICTAddress: 135 CYPRESS PARK DRCity, State, Zip: BENTON, LA, 71006Amount of Income (exact dollar amount): \$ 10,212.00

* 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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Upload: <https://eap.ethics.la.gov/FileUpload>**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 InterestName of Business (if applicable): CITY OF BOSSIER CITY W-2 COUNCILMANName of Income Source: CITY OF BOSSIER CITY W-2 COUNCILMANAddress: 620 BENTON ROADCity, State, Zip: BOSSIER CITY, LA, 71111Amount of Income (exact dollar amount): \$ 10,200.00☐ 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) 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.

LOUISIANA BOARD OF ETHICS

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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.

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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 ☐ SpouseName of Business: BROTHERS VENTUREAddress: 44 Duck Haven Pt.City, State, Zip: Bossier City, LA, 71111

Nature of services rendered or reason income was received:

REAL ESTATE

☒ Filer ☐ SpouseName of Business: David A. Montgomery , Jr. InsuranceAddress: 44 Duck Haven Pt.City, State, Zip: Bossier City, LA, 71111

Nature of services rendered or reason income was received:

INSURANCE SALES AND BROKERAGE

☒ Filer ☐ SpouseName of Business: BUSINESS FIRST BANCSHARES INCAddress: 500 LAUREL STREET, STE 101City, State, Zip: BATON ROUGE, LA, 70801

Nature of services rendered or reason income was received:

MEMBER 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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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 ☐ SpouseName of Business: MONTGOMERY AGENCY, INC.Address: 1913 CITIZENS BANK DRIVECity, State, Zip: BOSSIER CITY, LA, 71111

Nature of services rendered or reason income was received:

INSURANCE SALES

☒ Filer ☐ SpouseName of Business: FRENCHY'S LLCAddress: 44 Duck Haven Pt.City, State, Zip: Bossier City, LA, 71111

Nature of services rendered or reason income was received:

RENT INCOME

☒ Filer ☐ SpouseName of Business: D & L , LLCAddress: 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.

* "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.

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 I: Other Income** (any other income that exceeds \$1,000)☐ Check if not applicable☒ Filer ☐ Spouse

Description of Income:

INTEREST & DIVIDEND FROM INVESTMENTS

Nature of services rendered or reason income was received:

INVESTMENT INCOME

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:

INTEREST & DIVIDENDS FROM INVESTMENTS

Nature of services rendered or reason income was received:

INVESTMENT INCOME

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.**

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 J: Investment Holdings** (an investment holding that exceeds \$5,000)☐ Check if not applicable☒ 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☒ Filer ☐ Spouse ☐ BothName of Security: CATERPILLAR 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, exchange-traded 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 J: Investment Holdings** (an investment holding that exceeds \$5,000)☐ Check if not applicable☒ Filer ☐ Spouse ☐ BothName of Security: CHEVRON CORPDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: CONOCOPHILLIPSDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: EXXON MOBILE CORPDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: GOLDMAN SACHS GROUPDescription 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, exchange-traded funds, education investment accounts, retirement investment accounts, government bonds, and cash/cash equivalent investments.

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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: INTERNATIONAL BUSINESS MACHINEDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: ELI LILLY % COMPANYDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: MERCK & COMPANY INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: MICROSOFT CORPDescription 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, exchange-traded funds, education investment accounts, retirement investment accounts, government bonds, and cash/cash equivalent investments.

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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: 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☒ Filer ☐ Spouse ☐ BothName of Security: PHILLIPS 66Description 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, exchange-traded 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: CHUBB LIMITEDDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: US TREASURY BILLSDescription of Security:
TREASURY BILLS☒ Filer ☐ Spouse ☐ BothName of Security: AMAZON COM 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, exchange-traded funds, education investment accounts, retirement investment accounts, government bonds, and cash/cash equivalent investments.

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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: BERKSHIRE HATHAWAY INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: COSTCO WHOLESALE CORPDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: META PLATFORMS INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: ELI LILLY % COMPANYDescription 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, exchange-traded 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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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: NETFLIX INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: ORACLE CORPDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: RTX CORPDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: SALESFORCE 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.

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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: TESLA INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: TEXTRON INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: VERTEX PHARMACEUTICALS INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: VISA 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: FIRST TRUST DORSEY WRIGHT ETFDescription of Security:
ETF☒ Filer ☐ Spouse ☐ BothName of Security: SPDR GOLD SHARESDescription of Security:
ETF☒ Filer ☐ Spouse ☐ BothName of Security: ALPHABET INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: APPLIED MATLS 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: BLACKSTONE INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: CISCO SYSTEMS INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: DOW INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: GE AEROSPACE COMDescription 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: JPMORGAN CHASE & COMPANYDescription of Security:
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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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 J: Investment Holdings** (an investment holding that exceeds \$5,000)☐ Check if not applicable☒ Filer ☐ Spouse ☐ BothName of Security: NVIDIA CORPDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: ORACLE CORPDescription 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

* 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.

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

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: WASTE MANAGEMENT INCDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: WILLIAMS COMPANIESDescription of Security:
STOCK☒ Filer ☐ Spouse ☐ BothName of Security: CROWN CASTLE INCDescription of Security:
REIT☒ Filer ☐ Spouse ☐ BothName of Security: ENTERPRISE PRODUCTS PARTNERS LPDescription of Security:
EPD

* 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.

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

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: BUSINESS FIRST BANCSHARES INCDescription of Security:
STOCK☐ Filer ☐ Spouse ☐ Both

Name of Security: _____

Description of Security:

☐ Filer ☐ Spouse ☐ Both

Name of Security: _____

Description of Security:

☐ Filer ☐ Spouse ☐ Both

Name of Security: _____

Description of Security:

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* 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, exchange-traded funds, education investment accounts, retirement investment accounts, government bonds, and cash/cash equivalent investments.

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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>March 8, 2024</u>	
Description of Transaction: SOLD STOCK ADOBE 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>April 10, 2024</u>	
Description of Transaction: SOLD STOCK ADVANCED MICRO DEVICES 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>April 10, 2024</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>April 10, 2024</u>	
Description of Transaction: SOLD STOCK AMAZON COM 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)

*** 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, exchange-traded 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>April 10, 2024</u>	
Description of Transaction: SOLD STOCK META PLATFORMS 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>April 26, 2024</u>	
Description of Transaction: SOLD STOCK LULULEMON 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 23, 2024</u>	
Description of Transaction: SOLD STOCK FT VEST US EQUITY	
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>November 7, 2024</u>	
Description of Transaction: SOLD STOCK NOVO-NORDISK	
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, exchange-traded 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>April 10, 2024</u>	
Description of Transaction: SOLD STOCK NVIDIA 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>April 10, 2024</u>	
Description of Transaction: SOLD STOCK SALESFORCE 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>April 10, 2024</u>	
Description of Transaction: SOLD STOCK VISA 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>April 10, 2024</u>	
Description of Transaction: SOLD STOCK WORKDAY 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, exchange-traded 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>May 16, 2024</u>	
Description of Transaction: SOLD STOCK EXXON MOBILE	
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>August 14, 2024</u>	
Description of Transaction: SOLD STOCK ELI LILLY & 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>August 14, 2024</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>August 14, 2024</u>	
Description of Transaction: SOLD STOCK NETFLIX 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, exchange-traded 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>December 31, 2024</u>	
Description of Transaction: SOLD STOCK TEXTRON 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 14, 2024</u>	
Description of Transaction: SOLD STOCK WORKDAY 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>April 10, 2024</u>	
Description of Transaction: SOLD STOCK APPLIED METALS	
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 26, 2024</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)

*** 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, exchange-traded 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>April 10, 2024</u>	
Description of Transaction: SOLD STOCK META PLATFORMS 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>January 26, 2024</u>	
Description of Transaction: SOLD STOCK FT VEST US EQUITY	
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>April 10, 2024</u>	
Description of Transaction: SOLD STOCK AEROSPACE COM	
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 26, 2024</u>	
Description of Transaction: SOLD STOCK OKTA 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, exchange-traded funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

LOUISIANA BOARD OF ETHICS

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<input checked="" type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both	
Transaction Date: <u>December 31, 2024</u>	
Description of Transaction: SOLD STOCK CROWN CASTLE 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>December 31, 2024</u>	
Description of Transaction: SOLD STOCK DOW 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>December 23, 2024</u>	
Description of Transaction: SOLD STOCK NOVO-NORDISK	
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 31, 2024</u>	
Description of Transaction: SOLD STOCK UPS 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)

*** 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, exchange-traded 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☒ Filer ☐ Spouse ☐ BothTransaction Date: April 10, 2024Description of Transaction:
SOLD STOCK AT&TAmount 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 ☐ BothTransaction Date: December 31, 2024Description of Transaction:
SOLD STOCK CHEVRON CORPAmount 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 ☐ BothTransaction Date: March 8, 2024Description of Transaction:
SOLD STOCK CISCO SYSTEMSAmount 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 ☐ BothTransaction Date: January 23, 2024Description of Transaction:
SOLD STOCK FT VEST US EQUITYAmount 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, exchange-traded funds, education investment accounts, retirement investment accounts, government bonds, cash or cash equivalent investments.**

LOUISIANA BOARD OF ETHICS

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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>December 31, 2024</u>	
Description of Transaction: SOLD STOCK JP MORGAN	
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 23, 2024</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>December 31, 2024</u>	
Description of Transaction: SOLD STOCK CHEVRON 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 type="checkbox"/> Filer <input type="checkbox"/> Spouse <input type="checkbox"/> Both	
Transaction Date: _____	
Description of Transaction: 	
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 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, exchange-traded 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 L: Liabilities** (a liability that exceeds \$10,000)☒ Check if not 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.

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 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☐ Filer ☐ Spouse ☐ Both

Name of Business: _____

Address: _____

City, State, Zip: _____

Business Description: _____

Nature of Association: _____

Amount of Interest: _____%

☐ Filer ☐ Spouse ☐ Both

Name of Business: _____

Address: _____

City, State, Zip: _____

Business Description: _____

Nature of Association: _____

Amount of Interest: _____%

☐ Filer ☐ Spouse ☐ Both

Name of Business: _____

Address: _____

City, State, Zip: _____

Business Description: _____

Nature of Association: _____

Amount of Interest: _____%

☐ Filer ☐ Spouse ☐ 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 SCHEDULE M.

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 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 ☐ BusinessType 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 ☐ BusinessType 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 ☐ BusinessType 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 ☐ BusinessType 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.

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 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☐ Filer ☐ Spouse

Name of Governmental Entity: _____

Nature of Contract/Sub-Contract: _____

Value (of thing of economic value) Derived: _____

☐ Filer ☐ Spouse

Name of Governmental Entity: _____

Nature of Contract/Sub-Contract: _____

Value (of thing of economic value) Derived: _____

☐ Filer ☐ Spouse

Name of Governmental Entity: _____

Nature of Contract/Sub-Contract: _____

Value (of thing of economic value) Derived: _____

☐ Filer ☐ 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).**