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

(ANNUAL) TIER 1 PERSONAL FINANCIAL DISCLOSURE STATEMENT

☒ I currently hold an office that would require me to file a Tier 2, Tier 2.1, or Tier 3 Personal Financial Disclosure Statement. As such, I have completed SCHEDULE D.

THIS REPORT COVERS CALENDAR YEAR: 2024

☒ ORIGINAL REPORT
☐ 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: Governor

NAME OF FILER (print full name): Jeff Landry

Address (residence): 203 Silver Oak Lane

City, State, Zip: Broussard, LA, 70518

NAME OF SPOUSE (if applicable) (print full name): Sharon LeBlanc Landry

Spouse's Occupation: Housewife

Principal Business Address: 203 Silver Oak Lane Broussard, LA 70518

City, State, Zip: Broussard, LA, 70518

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.
NOTE: La. R.S. 42:1124.1 DOES NOT provide you the opportunity to request an extension in filing your personal financial disclosure statement.

Certification 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-2778
DATE FILED: 5/14/2025

Signature of Filer

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Schedule A: Employment Information

☐ Check if not applicable

☒Filer ☐Spouse ☒Full-Time ☐ Part-Time

Name of Employer: State of Louisiana Office of the Governor

Job Title: Governor

Job Description:
Governor

☐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 complete SCHEDULE A 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.**

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Schedule B: Positions – Business

☐ Check if not applicable

☒Filer ☐Spouse ☐Both
Amount of Interest: 100.00 %
Name of Business: J. M Landry & Associates
Address: P. O. Box 990
City, State, Zip: Brou, LA, 70518
Business Description: Consulting
Nature of Association: Owner

☐Filer ☒Spouse ☐Both
Amount of Interest: 20.00 %
Name of Business: Regal Developers
Address: P. O. Box 12240
City, State, Zip: New Iberia, LA, 70562
Business Description: Real Estate Holding
Nature of Association: Member

☒Filer ☐Spouse ☐Both
Amount of Interest: 100.00 %
Name of Business: Evergreen Contractors
Address: P. O. Box 990
City, State, Zip: Broussard, LA, 70518
Business Description: Service Company
Nature of Association: Member

☒Filer ☐Spouse ☐Both
Amount of Interest: 25.00 %
Name of Business: J. D. Productions
Address: 1019 Albertson Parkway
City, State, Zip: Broussard, LA, 70581
Business Description: Service Company
Nature of Association: 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 OR 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: 100.00 %
Name of Business: W. J. & Associates
Address: P. O. Box 990
City, State, Zip: Broussard, LA, 70518
Business Description: Real Estate Holding
Nature of Association: Owner

☒Filer ☐Spouse ☐Both
Amount of Interest: 100.00 %
Name of Business: The Law Firm of J. M. Landry
Address: P. O. Box 990
City, State, Zip: Broussard, LA, 70518
Business Description: Law Firm
Nature of Association: Attorney

☒Filer ☐Spouse ☐Both
Amount of Interest: 14.29 %
Name of Business: Bucks & Ducks
Address: P. O. Box 990
City, State, Zip: Broussard, LA, 70518
Business Description: Lease
Nature of Association: Mem

☒Filer ☐Spouse ☐Both
Amount of Interest: 100.00 %
Name of Business: UST Environmental Services
Address: P.O. Box 990
City, State, Zip: Broussard, LA, 70518
Business Description: Service Company
Nature of Association: Member

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Schedule B: Positions – Business

☐ Check if not applicable

☒Filer ☐Spouse ☐Both
Amount of Interest: 100.00 %
Name of Business: Prime Strategic Service
Address: P.O. Box 990
City, State, Zip: Broussard, LA, 70518
Business Description: Service Company
Nature of Association: Member

☒Filer ☐Spouse ☐Both
Amount of Interest: 50.00 %
Name of Business: BJL Family Investmen
Address: 720 St. Nazaire
City, State, Zip: Broussard, LA, 70518
Business Description: Real Estate Holdings
Nature of Association: Member

☐Filer ☐Spouse ☐Both
Amount of Interest: _____%
Name of Business: _____
Address: _____
City, State, Zip: _____
Business Description: _____
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 OR if you or your spouse (either individually or collectively) owns an interest in a business which exceeds 10%.**

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SCHEDULE C: POSITIONS – NONPROFIT

☐ Check if not applicable

☐Filer ☒Spouse
Name of Organization: GOVERNOR'S MANSION PRESERVATION FOUNDATION
Address: 1001 CAPITOL ACCESS ROAD
City, State, Zip: BATON ROUGE, LA, 70802
Nature of Association: OFFICER
Description of Organization: GOVERNOR'S MANSION PRESERVATION FOUNDATION

☐Filer ☐Spouse
Name of Organization: _____
Address: _____
City, State, Zip: _____
Nature of Association: _____
Description of Organization:

☐Filer ☐Spouse
Name of Organization: _____
Address: _____
City, State, Zip: _____
Nature of Association: _____
Description of Organization:

☐Filer ☐Spouse
Name of Organization: _____
Address: _____
City, State, Zip: _____
Nature of Association: _____
Description of Organization:

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

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Schedule D: Other Offices/Positions Held

(Positions that would require the filing of a Tier 2, Tier 2.1, or Tier 3 Personal Financial Disclosure Statement)

☒ Check if not applicable

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

*** 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, 42:1124.2.1, or 42:1124.3.**

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Schedule E: Immovable Property

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

☐ Check if not applicable

Address or Location of Property: ☐Filer ☐Spouse ☒ Both
State: Louisiana Parish/County: Lafayette
Address: 203 Silver Oak Lane Broussard, LA 70518
Description of Property: Residence

Value of the Interest in the Parcel by Category:
☐Category I (less than $5,000) ☐Category II ($5,000-$24,999) ☐Category III ($25,000-$49,999)
☐Category IV ($50,000-$99,999) ☐Category V ($100,000-$199,999) ☒Category VI ($200,000 or more)

Address or Location of Property: ☐Filer ☐Spouse ☐ Both
State:_____ Parish/County: _____
Address: _____
Description of Property:

Value of the Interest in the Parcel by Category:
☐Category I (less than $5,000) ☐Category II ($5,000-$24,999) ☐Category III ($25,000-$49,999)
☐Category IV ($50,000-$99,999) ☐Category V ($100,000-$199,999) ☐Category VI ($200,000 or more)

Address or Location of Property: ☐Filer ☐Spouse ☐ Both
State:_____ Parish/County: _____
Address: _____
Description of Property:

Value of the Interest in the Parcel by Category:
☐Category I (less than $5,000) ☐Category II ($5,000-$24,999) ☐Category III ($25,000-$49,999)
☐Category IV ($50,000-$99,999) ☐Category V ($100,000-$199,999) ☐Category VI ($200,000 or more)

Address or Location of Property: ☐Filer ☐Spouse ☐ Both
State:_____ Parish/County: _____
Address: _____
Description of Property:

Value of the Interest in the Parcel by Category:
☐Category I (less than $5,000) ☐Category II ($5,000-$24,999) ☐Category III ($25,000-$49,999)
☐Category IV ($50,000-$99,999) ☐Category V ($100,000-$199,999) ☐Category VI ($200,000 or more)

*** You are required to disclose the address, if any, and if no address, the location by state, and parish/county.**
*** Fair market value and use value are determined by the assessor for purposes of ad valorem taxes.**

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

☐ Check if not applicable

☒Filer ☐Spouse ☐Business (where amount of interest exceeds 10%)
Type of Income: ☒State ☐Political Subdivision ☐ Gaming Interest
Name of Business (if applicable): State Of Louisiana
Name of Income Source: Office Of The Governor
Address: 1001 Capitol Access Road
City, State, Zip: Baton Rouge, LA, 70802
Amount of Income (exact dollar amount): $ 108,223.76

☐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.**

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Schedule G: Income (income that exceeds $1,000 from each source)

☐ Check if not applicable

☒ Filer ☐ Spouse
Name of Source of Income: UST Environmental Services LLC
Address: P.O. Box 990
City, State, Zip: Broussard, LA, 70518
Nature of Services Rendered: Service Company
Type of Income: Service Company
Amount of Income: ☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999) ☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☒ Category VI ($200,000 or more)

☒ Filer ☐ Spouse
Name of Source of Income: Evergreen Contractors LLC
Address: P.O. Box 990
City, State, Zip: Broussard, LA, 70518
Nature of Services Rendered: Service Company
Type of Income: Service Company
Amount of Income: ☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☒ Category III ($25,000-$49,999) ☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ Filer ☒ Spouse
Name of Source of Income: Regal Developers
Address: P.O. Box 12240
City, State, Zip: New Iberia, LA, 70562
Nature of Services Rendered: Real Estate Holding
Type of Income: Real Estate
Amount of Income: ☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999) ☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ Filer ☐ Spouse
Name of Source of Income: _____
Address: _____
City, State, Zip: _____
Nature of Services Rendered: _____
Type of Income: _____
Amount of Income: ☐ Category I (less than $5,000) ☐ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999) ☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE G if you or your spouse received income in excess of $1,000 from each source of income.**
*** "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 disclose income derived from disability payments from any source; or child support or alimony payments contained in a court order.**
*** Income that is reported on SCHEDULE F does not have to be restated on SCHEDULE G.**
*** If the income is derived from professional or consulting services and the disclosure of the source's name or address is prohibited by law or professional code, such income should be disclosed on SCHEDULE H.**

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Schedule H: Income from Certain Professional or Consulting Services

☒ CHECK if no income was received from professional or consulting services (including mental health, medical health, or legal services) when the disclosure of the name or address of the source of income would be prohibited by law or by a professional code.

☒ Check if not applicable

	INDUSTRY TYPE	# OF CLIENTS	AMOUNT OF INCOME BY CATEGORY	INCOME RECIPIENT
UTILITIES	Electric		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Gas		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Telephone		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Water		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Cable Television Companies		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	INDUSTRY TYPE	**# OF CLIENTS**	**AMOUNT OF INCOME BY CATEGORY**	**INCOME RECIPIENT**
TRANSPORTATION	Intrastate Companies		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Pipeline Companies		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Oil & Gas Exploration		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Oil & Gas Production		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Oil & Gas Retailers		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	INDUSTRY TYPE	**# OF CLIENTS**	**AMOUNT OF INCOME BY CATEGORY**	**INCOME RECIPIENT**
FINANCE & INSURANCE	Banks		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Savings & Loan Assoc.		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Loan and/or Finance		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Manufacturing Firms		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Mining Companies		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Life Insurance Companies		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Casualty Insurance Comp.		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Other Insurance Companies		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both

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Schedule H: Income From Certain Professional or Consulting Services (continued)

☒ Check if not applicable

	INDUSTRY TYPE	# OF CLIENTS	AMOUNT OF INCOME BY CATEGORY	INCOME RECIPIENT
RETAIL COMPANIES	Beer Companies		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Wine Companies		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Liquor Companies		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Beverage Distributors		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	INDUSTRY TYPE	**# OF CLIENTS**	**AMOUNT OF INCOME BY CATEGORY**	**INCOME RECIPIENT**
ASSOCIATIONS	Trade		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	Professional		☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
	INDUSTRY TYPE	**# OF CLIENTS**	**AMOUNT OF INCOME BY CATEGORY**	**INCOME RECIPIENT**
OTHER			☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
			☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
			☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
			☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
			☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
			☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
			☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both
			☐ I ☐II ☐III ☐IV ☐V ☐VI	☐ Filer ☐ Spouse ☐ Both

*** You are required to complete SCHEDULE H if you or your spouse received income from a professional or consulting service (including mental health, medical health, or legal services) when the disclosure of the name or address of the source of income would be prohibited by law or by a professional code.**

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

CATEGORY RANGES:

CATEGORY I (LESS THAN $5,000) **CATEGORY II ($5,000-$24,999)** **CATEGORY III ($25,000-$49,999)**
CATEGORY IV ($50,000-$99,999) **CATEGORY V ($100,000-$199,999)** **CATEGORY VI ($200,000 OR MORE)**

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Schedule I: Investment Holdings (a holding that exceeds $5,000 in value)

☐ Check if not applicable

☒Filer ☐Spouse ☐ Both

Name of Security: CVX

Description of Security: CHEVRON

Value by Category: ☐**Category I** (less than $5,000) ☒**Category II** ($5,000-$24,999) ☐**Category III** ($25,000-$49,999 ☐**Category IV** ($50,000-$99,999) ☐**Category V** ($100,000-$199,999) ☐**Category VI** ($200,000 or more)

☒Filer ☐Spouse ☐ Both

Name of Security: ABBV

Description of Security: ABBVIE INC.

Value by Category: ☐**Category I** (less than $5,000) ☒**Category II** ($5,000-$24,999) ☐**Category III** ($25,000-$49,999 ☐**Category IV** ($50,000-$99,999) ☐**Category V** ($100,000-$199,999) ☐**Category VI** ($200,000 or more)

☒Filer ☐Spouse ☐ Both

Name of Security: MO

Description of Security: ALTRIA GROUP INC.

Value by Category: ☐**Category I** (less than $5,000) ☒**Category II** ($5,000-$24,999) ☐**Category III** ($25,000-$49,999 ☐**Category IV** ($50,000-$99,999) ☐**Category V** ($100,000-$199,999) ☐**Category VI** ($200,000 or more)

☒Filer ☐Spouse ☐ Both

Name of Security: AAPL

Description of Security: APPLE INC.

Value by Category: ☐**Category I** (less than $5,000) ☒**Category II** ($5,000-$24,999) ☐**Category III** ($25,000-$49,999 ☐**Category IV** ($50,000-$99,999) ☐**Category V** ($100,000-$199,999) ☐**Category VI** ($200,000 or more)

*** You are required to complete SCHEDULE I if you or your spouse holds investment securities that have a value that exceeds $5,000 each.**

*** 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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Schedule I: Investment Holdings (a holding that exceeds $5,000 in value)

☐ Check if not applicable

☒Filer ☐Spouse ☐ Both

Name of Security: MSFT

Description of Security: MICROSOFT CORP

Value by Category: ☐**Category I** (less than $5,000) ☒**Category II** ($5,000-$24,999) ☐**Category III** ($25,000-$49,999 ☐**Category IV** ($50,000-$99,999) ☐**Category V** ($100,000-$199,999) ☐**Category VI** ($200,000 or more)

☐Filer ☒Spouse ☐ Both

Name of Security: CVX

Description of Security: CHEVRON

Value by Category: ☐**Category I** (less than $5,000) ☒**Category II** ($5,000-$24,999) ☐**Category III** ($25,000-$49,999 ☐**Category IV** ($50,000-$99,999) ☐**Category V** ($100,000-$199,999) ☐**Category VI** ($200,000 or more)

☐Filer ☐Spouse ☐ Both

Name of Security: _____

Description of Security:

Value by Category: ☐**Category I** (less than $5,000) ☐**Category II** ($5,000-$24,999) ☐**Category III** ($25,000-$49,999 ☐**Category IV** ($50,000-$99,999) ☐**Category V** ($100,000-$199,999) ☐**Category VI** ($200,000 or more)

☐Filer ☐Spouse ☐ Both

Name of Security: _____

Description of Security:

Value by Category: ☐**Category I** (less than $5,000) ☐**Category II** ($5,000-$24,999) ☐**Category III** ($25,000-$49,999 ☐**Category IV** ($50,000-$99,999) ☐**Category V** ($100,000-$199,999) ☐**Category VI** ($200,000 or more)

*** You are required to complete SCHEDULE I if you or your spouse holds investment securities that have a value that exceeds $5,000 each.**

*** 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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Schedule J: Transactions (a transaction that exceeds $5,000)

☐ Check if not applicable

☒ Filer ☐ Spouse ☐ Both

Transaction Date: August 10, 2023
Description of Transaction: BUY ALTRIA GROUP INC.

Amount of Transaction:
☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ Filer ☒ Spouse ☐ Both

Transaction Date: March 23, 2023
Description of Transaction: SOLD FIRST HORIZON BANK

Amount of Transaction:
☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ Filer ☒ Spouse ☐ Both

Transaction Date: March 23, 2023
Description of Transaction: SOLD PIONEER NATURAL RESOURCES COMPANY

Amount of Transaction:
☐ Category I (less than $5,000) ☒ Category II ($5,000-$24,999) ☐ Category III ($25,000-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

☐ 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-$49,999)
☐ Category IV ($50,000-$99,999) ☐ Category V ($100,000-$199,999) ☐ Category VI ($200,000 or more)

*** You are required to complete SCHEDULE J if you or your spouse purchased or sold any immovable property, personally owned tax credit certificates, stocks, bonds, or commodities futures THAT EXCEED $5,000 EACH, including any option to acquire or dispose of any immovable property or of any personally owned tax credit certificates, stocks, bonds, or commodities futures.**
*** You ARE NOT REQUIRED to report information concerning variable annuities, variable life insurance, variable universal life insurance, mutual funds, or exchange-traded funds.**

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Schedule K: 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): _____
Nature of Liability: _____
Amount of liability: ☐Category I (less than $5,000) ☐Category II ($5,000-$24,999) ☐Category III ($25,000-$49,999)
☐Category IV ($50,000-$99,999) ☐Category V ($100,000-$199,999) ☐Category VI ($200,000 or more)

☐Filer ☐Spouse
Name of Creditor: _____
Address: _____
City, State, Zip: _____
Name of Guarantor (if applicable): _____
Nature of Liability: _____
Amount of liability: ☐Category I (less than $5,000) ☐Category II ($5,000-$24,999) ☐Category III ($25,000-$49,999)
☐Category IV ($50,000-$99,999) ☐Category V ($100,000-$199,999) ☐Category VI ($200,000 or more)

☐Filer ☐Spouse
Name of Creditor: _____
Address: _____
City, State, Zip: _____
Name of Guarantor (if applicable): _____
Nature of Liability: _____
Amount of liability: ☐Category I (less than $5,000) ☐Category II ($5,000-$24,999) ☐Category III ($25,000-$49,999)
☐Category IV ($50,000-$99,999) ☐Category V ($100,000-$199,999) ☐Category VI ($200,000 or more)

☐Filer ☐Spouse
Name of Creditor: _____
Address: _____
City, State, Zip: _____
Name of Guarantor (if applicable): _____
Nature of Liability: _____
Amount of liability: ☐Category I (less than $5,000) ☐Category II ($5,000-$24,999) ☐Category III ($25,000-$49,999)
☐Category IV ($50,000-$99,999) ☐Category V ($100,000-$199,999) ☐Category VI ($200,000 or more)

*** You are required to complete SCHEDULE K if you or your spouse (either individually or collectively) owes a liability that exceeds $10,000 each.**
*** 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 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.**

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Schedule L: Contributions **(made within one year of employment - in excess of $1,000)**

☒ Check if not applicable

Date of Employment: _____ Salary: $_____

Candidate's Name: _____

Amount of Contribution or Loan: $_____

Date of Employment: _____ Salary: $_____

Candidate's Name: _____

Amount of Contribution or Loan: $_____

Date of Employment: _____ Salary: $_____

Candidate's Name: _____

Amount of Contribution or Loan: $_____

Date of Employment: _____ Salary: $_____

Candidate's Name: _____

Amount of Contribution or Loan: $_____

Date of Employment: _____ Salary: $_____

Candidate's Name: _____

Amount of Contribution or Loan: $_____

*** You are required to complete SCHEDULE L if you are 1) directly employed by a *statewide elected official* to serve as an agency head AND you made a contribution or loan in excess of $1,000 to the campaign of the official who employed you; and/or, 2) appointed to a state board or commission AND you made a contribution or loan in excess of $1,000 to a campaign of the official who appointed you.**

*** You are only required to disclose contributions or loans made within one year of employment or appointment.**

*** "Candidate" means a person who seeks nomination or election to public office, except the office of president or vice president of the United States, presidential elector, delegate to a political party convention, United States senator, United States congressman, or political party office.**

*** "Contribution" means a gift, conveyance, payment, or deposit of money or anything of value, or the forgiveness of a loan or of a debt, made for the purpose of supporting, opposing, or otherwise influencing the nomination or election of a person to public office, whether made before or after the election.**

*** "Loan" means a transfer of money, property, or anything of value in exchange for obligation to repay in whole or in part, made for the purpose of supporting, opposing, or otherwise influencing the nomination for election, or election, of any person to public office.**