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(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: 2025

☒ 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: Lieutenant Governor

NAME OF FILER (print full name): William (Billy) Nungesser

Mailing Address: 1720 Ox Bow Lane

City, State, Zip: Covington, LA, 70433

NAME OF SPOUSE (if applicable) (print full name): Cher Nungesser

Spouse's Occupation: Homemaker

Principal Business Address: 1720 Ox Bow Lane

City, State, Zip: Covington, LA, 70433

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-4775
DATE FILED: 5/15/2026

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

Job Title: Lieutenant Governor

Job Description:
Exercises powers delegated by the Governor and serves as Commissioner of the LA Department of Culture, Recreation and Tourism.

☐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: Nungesser Land Co LLC
Address: 1720 Ox Bow Ln
City, State, Zip: Covington, LA, 70433
Business Description: Managing member
Nature of Association: Land development; property rentals

☒Filer ☐Spouse ☐Both
Amount of Interest: 100.00 %
Name of Business: Elkland, LLC
Address: 1720 Ox Bow Ln
City, State, Zip: Covington, LA, 70433
Business Description: Shareholder: President
Nature of Association: Farming, animal breeding

☒Filer ☐Spouse ☐Both
Amount of Interest: 100.00 %
Name of Business: Live Oak Grove Properties LLC
Address: 1720 Ox Bow Ln
City, State, Zip: Covington, LA, 70433
Business Description: Nungesser Land is Managing Member
Nature of Association: Real estate holding

☒Filer ☐Spouse ☐Both
Amount of Interest: 100.00 %
Name of Business: Live Oak Grove Plantation Investments LLC
Address: 1720 Ox Bow Ln
City, State, Zip: Covington, LA, 70433
Business Description: Managing member
Nature of Association: Real estate holding

*** 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: 70.00 %
Name of Business: Live Oak Grove Plantation Development LLC
Address: 1720 Ox Bow Lane
City, State, Zip: Covington, LA, 70433
Business Description: Live Oak Grove Planation Investments LLC is the managing member
Nature of Association: Real estate holding ; Rental real estate partnership

☒Filer ☐Spouse ☐Both
Amount of Interest: 100.00 %
Name of Business: Duckland LLC
Address: 1720 Ox Bow Lane
City, State, Zip: Covington, LA, 70433
Business Description: Managing member
Nature of Association: Real estate holding

☐Filer ☒Spouse ☐Both
Amount of Interest: 33.00 %
Name of Business: American Outdoor Advertising LLC
Address: 204 Timberlane Rd
City, State, Zip: Gretna, LA, 70056
Business Description: Member
Nature of Association: Outdoor advertising

☒Filer ☐Spouse ☐Both
Amount of Interest: 100.00 %
Name of Business: Pointe Celeste River Properties
Address: 1720 Ox Bow Lane
City, State, Zip: Covington, LA, 70433
Business Description: Member
Nature of Association: Real estate holding

*** 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 C: POSITIONS – NONPROFIT

☐ Check if not applicable

☒Filer ☐Spouse
Name of Organization: Cher & Billy Nungesser Foundation
Address: 1720 Ox Bow Ln
City, State, Zip: Covington, LA, 70433
Nature of Association: Charitable
Description of Organization: 501C3

☐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: Louisiana Byways Commission / Board Member
Name of Office/Position: Louisiana Tourism Development Commission / Board Member
Name of Office/Position: State of Louisiana Lieutenant Governor
Name of Office/Position: Interim Emergency Board / Member
Name of Office/Position: State Board of Commerce and Industry / Member
Name of Office/Position: State Board of Election Supervisors / Member
Name of Office/Position: State Bond Commission / Member
Name of Office/Position: Louisiana Board of International Commerce / Member

*** 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 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: Louisiana Seafood Promotion and Marketing Board / Member
Name of Office/Position: Department of Culture, Recreation & Tourism/Lt.Governor/Commissioner
Name of Office/Position: Louisiana State Museum Board / Member
Name of Office/Position: LSU Museum of Arts Board / Member
Name of Office/Position: Costal Protection and Restoration Authority / Member
Name of Office/Position: New Orleans City Park Improvement Association/ Member
Name of Office/Position: America 250/ Member
Name of Office/Position: The Aerospace States Association/Chairman of Board

*** 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 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: Kenner Naval Museum Commission
Name of Office/Position: LaSalle Cultural Corridor District
Name of Office/Position: Louisiana Commission on Civic Education
Name of Office/Position: Louisiana Environmental Education Commission
Name of Office/Position: Louisiana Military Family Assistance Board
Name of Office/Position: Louisiana Naval War Memorial Commission
Name of Office/Position: Encore Louisiana Commission
Name of Office/Position: Louisiana Civil Rights Museum Advisory Board

*** 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 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: Louisiana Tourism Promotion District Board of Directors
Name of Office/Position: State Library of Louisiana Board of Commissioners
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: St Tammany
Address: 581 Markie Drive Mandeville, LA 70471
Description of Property: Residential Real Estate - Mandeville, LA 70471

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: Louisiana Parish/County: St Tammany
Address: 1720 Ox Bow Lane Covington, LA 70433
Description of Property: Residential Real Estate River Club Subdivision Covington, LA 70433

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: Louisiana Parish/County: St Tammany
Address: 4028 Cypress Point Dr Covington, LA 70433
Description of Property: Residential Real Estate- Estates at Watercross - Covington, LA 70433

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: Louisiana Parish/County: Caddo
Address: 4005 Fern Ave Shreveport, LA 71104
Description of Property: Gas station Convenient store Shreveport

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): _____
Name of Income Source: Lieutenant Governor of Louisiana
Address: P. O. Box 94095
City, State, Zip: Baton Rouge, LA, 70804
Amount of Income (exact dollar amount): $ 114,334.58

☐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) meanstaxable 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: Concourse Financial Group Securities
Address: 2801 Hwy 280 South
City, State, Zip: Birmingham, AL, 35223
Nature of Services Rendered: N/A
Type of Income: Dividends & Capital Gain Distributions from Investments
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: Pershing Advisor Solutions LLC
Address: One Pershing Plaza
City, State, Zip: Jersey City, NJ, 07399
Nature of Services Rendered: N/A
Type of Income: Dividends & Capital Gain Distributions from Investments
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: Morgan Stanley Brokerage Account
Address: 1 New York Plaza 12th Floor
City, State, Zip: New York, NY, 10004
Nature of Services Rendered: N/A
Type of Income: Interest, Dividends & Capital Gain Distributions from Investments
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: Robinhood Brokerage Account
Address: 85 Willow Road
City, State, Zip: Menlo Park, CA, 94025
Nature of Services Rendered: N/A
Type of Income: Dividends & Capital Gains from Investments
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 G: Income (income that exceeds $1,000 from each source)

☐ Check if not applicable

☐Filer ☒Spouse
Name of Source of Income: ETrade Brokerage Account
Address: P. O. Box 484
City, State, Zip: Jersey City, NJ, 07303
Nature of Services Rendered: N/A
Type of Income: Dividends & Capital Gains from Investments
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: Duckland LLC
Address: P. O. Box 7264
City, State, Zip: Belle Chasse, LA, 70037
Nature of Services Rendered: N/A
Type of Income: Real estate sales
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: Goldman Sachs Bank
Address: P. O. Box 1978
City, State, Zip: Cranberry TWP, PA, 16066
Nature of Services Rendered: N/A
Type of Income: Interest 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)

☒Filer ☐Spouse
Name of Source of Income: Hancock Whitney Bank
Address: P. O. Box 4019
City, State, Zip: Gulfport, MS, 39502
Nature of Services Rendered: N/A
Type of Income: Interest 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.**
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*** 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 G: Income (income that exceeds $1,000 from each source)

☐ Check if not applicable

☒ Filer ☐ Spouse
Name of Source of Income: Bank Plus
Address: 118 Lake Drive
City, State, Zip: Covington, LA, 70433
Nature of Services Rendered: N/A
Type of Income: Interest 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)

☒ Filer ☐ Spouse
Name of Source of Income: PPQBR, LLC
Address: 3500 N. Causeway Blvd Suite 600
City, State, Zip: Metairie, LA, 70002
Nature of Services Rendered: N/A
Type of Income: Partnership 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)

☒ Filer ☐ Spouse
Name of Source of Income: Live Oak Grove Plantation Development LLC
Address: 4028 Cypress Point Drive
City, State, Zip: Covington, LA, 70433
Nature of Services Rendered: N/A
Type of Income: Partnership 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)

☒ Filer ☐ Spouse
Name of Source of Income: Jessica Holloway
Address: 155 Colony Road
City, State, Zip: Belle Chasse, LA, 70037
Nature of Services Rendered: Residential Mortgage
Type of Income: Mortgage Interest - Owner Financing
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.**
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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: Julie Ronquille
Address: P. O. Box 144
City, State, Zip: Belle Chasse, LA, 70037
Nature of Services Rendered: Residential Mortgage
Type of Income: Mortgage Interest - Owner Financing
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: Bayan Ayyad
Address: 492 Westmeade Blvd
City, State, Zip: Gretna, LA, 70056
Nature of Services Rendered: Residential Mortgage
Type of Income: Mortgage Interest - Owner Financing
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: Darlene White
Address: 910 5th Street
City, State, Zip: Westwego, LA, 70094
Nature of Services Rendered: Residential Mortgage
Type of Income: Mortgage Interest 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)

☒ Filer ☐ Spouse
Name of Source of Income: Capital One
Address: PO Box 60
City, State, Zip: St Cloud, MN, 56302
Nature of Services Rendered: Certificate of Deposit
Type of Income: Interest
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.**
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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: Legacy Village at Spring Hill
Address: 9 Du Rhu Dr
City, State, Zip: Mobile, AL, 36608
Nature of Services Rendered: N/A
Type of Income: Partnership 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)

☒ Filer ☐ Spouse
Name of Source of Income: PMAT Crossroads Investment, LLC
Address: 15082 Crossroads Parkway
City, State, Zip: Gulfport, MS, 39503
Nature of Services Rendered: N/A
Type of Income: Partnership 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)

☒ Filer ☐ Spouse
Name of Source of Income: Escrow Funding, Inc
Address: 3324 N Causeway Blvd #210
City, State, Zip: Metairie, LA, 70002
Nature of Services Rendered: Land -Bond for Deed
Type of Income: Mortgage Interest - Owner Financing- pay balances
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: Todd Allain
Address: 3525 Prytania St Suite 425
City, State, Zip: New Orleans, LA, 70115
Nature of Services Rendered: Land Mortgage
Type of Income: Mortgage Interest - Owner Financing
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 G: Income (income that exceeds $1,000 from each source)

☐ Check if not applicable

☒ Filer ☐ Spouse
Name of Source of Income: Live Oak Belle Chasse MHP LLC
Address: 111 West 10th Street
City, State, Zip: Kansas City, MO, 64105
Nature of Services Rendered: Trailer Park Mortgage
Type of Income: Mortgage Interest - Owner Financing - paid off balance also
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: Croatan Luna Pointe
Address: 102 Sunrise Cove
City, State, Zip: Hampton, VA, 23666
Nature of Services Rendered: N/A
Type of Income: Delaware Statutory Trust Distribution
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: RK Pointe at Eastshore
Address: 2423 Areca Palm Drive
City, State, Zip: Apopka, FL, 32703
Nature of Services Rendered: N/A
Type of Income: Delaware Statutory Trust Distribution
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: NexPoint Life Sciences
Address: 1 Casper Street
City, State, Zip: Danbury, CT, 06810
Nature of Services Rendered: N/A
Type of Income: Delaware Statutory Trust Distribution
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.**
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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: Starboard Realty Advisors
Address: 5344 Sycamore School Road
City, State, Zip: Fort Worth, TX, 76123
Nature of Services Rendered: N/A
Type of Income: Delaware Statutory Trust Distribution
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: Starboard Realty Advisors
Address: 2413 Race Street
City, State, Zip: Fort Worth, TX, 76111
Nature of Services Rendered: N/A
Type of Income: Delaware Statutory Trust Distribution
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: Inspired Senior Living of Reno
Address: 222 East Patriot Blvd
City, State, Zip: Reno, NV, 89511
Nature of Services Rendered: N/A
Type of Income: Delaware Statutory Trust Distribution
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: Inspired Senior Living of Naperville
Address: 2920 Leverenz Road
City, State, Zip: Naperville, IL, 60564
Nature of Services Rendered: N/A
Type of Income: Delaware Statutory Trust Distribution
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.**
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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: PPQ Northshore, LLC
Address: 3500 N Causeway Blvd / Suite 600
City, State, Zip: Metairie, LA, 70002
Nature of Services Rendered: N/A
Type of Income: Partnership Income- sold
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: BOLSU PCF, LLC
Address: 8900 Lawrence Road / Suite 182
City, State, Zip: Kemah, TX, 77565
Nature of Services Rendered: Sale of Property
Type of Income: Sale of Property
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: PMAT Crystal Investment, LLC
Address: 2215 Lakeshore Drive
City, State, Zip: Mandeville, LA, 70448
Nature of Services Rendered: N/A
Type of Income: Partnership 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)

☐ 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.**
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*** 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: BLACKROCK INC

Description of Security: 15.465 SHARES OF COMMON STOCK

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: CHEVRON

Description of Security: 107.623 SHARES OF COMMON STOCK

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: COCA COLA

Description of Security: 204.834 SHARES OF COMMON STOCK

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: CSX CORP

Description of Security: 800.618 SHARES OF COMMON STOCK

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: IBM

Description of Security: 110.280 SHARES OF COMMON STOCK

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: JP MORGAN CHASE

Description of Security: 50 SHARES OF COMMON STOCK

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: MC DONALDS CORP

Description of Security: 46 SHARES OF COMMON STOCK

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: MERCK CO

Description of Security: 191.286 SHARES OF COMMONS TOCK

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: MICROSOFT CORP

Description of Security: 51 SHARES OF COMMON STOCK

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: PFIZER INC

Description of Security: 335.201 SHARES OF COMMON STOCK

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: PROCTER & GAMBLE INC

Description of Security: 606.718 SHARES OF COMMON STOCK

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: REALTY INCOME GROUP

Description of Security: 108.427 SHARES OF COMMON STOCK

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.**

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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: 3M CO.

Description of Security: 65.070 SHARES OF COMMON STOCK

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: Arcosa Inc

Description of Security: 1,100.816 shares of common stock

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: General Mills Inc

Description of Security: 411.956 Shares of common Stock

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: Kimberly Clark Corp

Description of Security: 320.684 Shares of common Stock

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)

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Name of Security: Marathon Petroleum Corp

Description of Security: 2063.084 Shares of common Stock

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: Trinity Ind

Description of Security: 3839.933 Shares of common Stock

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: Williams Co Inc

Description of Security: 2552.627 Shares of common Stock

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: American Airlines

Description of Security: 314 Shares of common Stock

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)

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Name of Security: CVS Health Corp Com

Description of Security: 45 Shares of common Stock

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: Jet Blue Airways

Description of Security: 200 Shares of common Stock

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: Plug Power Inc

Description of Security: 265 Shares of common Stock

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: Tesla Inc

Description of Security: 75 Shares of common Stock

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)

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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: British Petroleum

Description of Security: 50 Shares of common Stock

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: Southwest Airlines

Description of Security: 117 Shares of common Stock

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: Carnival Cruise Lines

Description of Security: 100 Shares of common Stock

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: Blue Owl Real Estate NLT

Description of Security: 9,711.849 shares

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)

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☐ Check if not applicable

☒Filer ☐Spouse ☐ Both

Name of Security: Walmart Inc

Description of Security: 34 Shares

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: McDonalds

Description of Security: 4 shares

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: Alphabet Inc

Description of Security: 131 shares of common stock

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: Amazon Com Inc

Description of Security: 106 shares of common stock

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)

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☒Filer ☐Spouse ☐ Both

Name of Security: Apple Inc

Description of Security: 84 shares of common stock

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: Berkshire Hathaway CL-B New

Description of Security: 30 shares of common stock

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: Boston Scientific Corp

Description of Security: 172 shares of common stock

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: Conoco Phillips

Description of Security: 90 shares of common stock

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)

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Name of Security: Dwave Quantum Inc

Description of Security: 1356 shares of common stock

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: Eli Lilly & Co

Description of Security: 21 shares of common stock

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: Exxon Mobil Corp

Description of Security: 877 shares of common stock

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: First Solar Inc Com

Description of Security: 153 shares of common stock

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)

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Name of Security: Freeport McMoran CL-B

Description of Security: 467 shares of common stock

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: Metlife Incorporated

Description of Security: 308 shares of common stock

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: Netflix Inc

Description of Security: 87 shares of common stock

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: Nextera Energy Inc

Description of Security: 264 shares of common stock

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)

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Name of Security: Northrop Gruman CP

Description of Security: 27 shares of common stock

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: Nvidia

Description of Security: 341 shares of common stock

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: Palo Alto Networks Inc

Description of Security: 166 shares of common stock

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: Servicenow Inc

Description of Security: 107 shares of common stock

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)

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Name of Security: Sherwin Williams Company Ohio

Description of Security: 51 shares of common stock

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: T-Mobile US Inc Com

Description of Security: 49 shares of common stock

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: Thermo Fisher Scientific

Description of Security: 41 shares of common stock

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: Visa Inc CL A

Description of Security: 70 shares of common stock

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)

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

☒ Check if not applicable

☐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)

☐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)

☐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)

☐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.**
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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.**

LOUISIANA BOARD OF ETHICS
Electronically Filed (PFD E-Filed) Only
https://eap.ethics.la.gov/PFDOnline

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: $_____
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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.**