



Filing ID #10056317

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Joby Bernstein
Status: Congressional Candidate
State/District: CA16

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 02/2/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401K Plan ⇒ International Wasatch Emrg India [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
401K Plan ⇒ WASATCH CORE GR W [MF]		\$1,001 - \$15,000	None		
401K Plan ⇒ WASATCH EM MKT SEL W [MF]		\$1,001 - \$15,000	None		
401K Plan ⇒ WASATCH SM CP GRTH W [MF]		\$1,001 - \$15,000	None		
401K Plan ⇒ WASATCH SMCP VAL INV [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
401K Plan ⇒ WASATCH ULTRA GROWTH [MF]		\$1,001 - \$15,000	None		
Citibank Checking Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Clean Tech Investment Portfolio ⇒ Ameresco, Inc. Class A (AMRC) [ST]		\$1,001 - \$15,000	None		
Schwab Clean Tech Investment Portfolio ⇒ Enphase Energy, Inc. (ENPH) [ST]		\$1,001 - \$15,000	None		
Schwab Clean Tech Investment Portfolio ⇒ Hannon Armstrong Sustainable Infrastructure Capital, Inc. (HASI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Clean Tech Investment Portfolio ⇒ Iberdrola Sa Sponsored ADR (IBDRY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Clean Tech Investment Portfolio ⇒ Itron, Inc. (ITRI) [ST]		\$1,001 - \$15,000	None		
Schwab Clean Tech Investment Portfolio ⇒ MYR Group, Inc. (MYRG) [ST]		\$1,001 - \$15,000	None		
Schwab Clean Tech Investment Portfolio ⇒ NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Clean Tech Investment Portfolio ⇒ Quanta Services, Inc. (PWR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Clean Tech Investment Portfolio ⇒ Stem, Inc. Class A (STEM) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Aegon Ltd. New York Registry Shares (AEG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Aercap Holdings N.V. Ordinary Shares (AER) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ American Axle & Manufacturing Holdings, Inc. (AXL) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Investment Portfolio ⇒ Amgen Inc. (AMGN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Amplitude, Inc. - Class A (AMPL) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Applied Materials, Inc. (AMAT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Ashtead Group Plc Unsponsored ADR (ASHTY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Banco Santander, S.A. Sponsored ADR (SAN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ BAYERISCHE MOTO SPNS/ADR (BMWYY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ BorgWarner Inc. (BWA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ ClearPoint Neuro Inc. (CLPT) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Contl Ag Ord American Depositary Shares (CTTAY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ CyberArk Software Ltd. - Ordinary Shares (CYBR) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Doximity, Inc. Class A (DOCS) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Embraer S.A. (ERJ) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ EZCORP, Inc. - Class A Non-Voting (EZPW) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ FedEx Corporation (FDX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity MSCI Energy Index ETF (FENY) [ST]					
Schwab Investment Portfolio ⇒ First Trust Global Wind Energy ETF (FAN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ First Trust Natural Gas ETF (FCG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Global X Telemedicine & Digital Health ETF (EDOC) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Global-E Online Ltd. - ordinary shares (GLBE) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ GSK plc American Depositary Shares (GSK) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Inari Medical, Inc. (NARI) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ International Money Express, Inc. (IMXI) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Investment Portfolio ⇒ Invesco S&P 500 High Dividend Low Volatility ETF (SPHD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Invesco Solar ETF (TAN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ iShares Global Utilities ETF (JXI) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Investment Portfolio ⇒ Ishares MSCI United Kingdom Small Cap ETF (EWUS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ John Bean Technologies Corporation (JBT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Investment Portfolio ⇒ Komatsu Ltd Ord American Depositary Shares (KMTUY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Kroger Company (KR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Macy's Inc (M) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Meta Platforms, Inc. - Class A (META) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Okta, Inc. - Class A (OKTA) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ On Holding AG Class A Ordinary Shares (ONON) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Outset Medical, Inc. (OM) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Payoneer Global Inc. (PAYO) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Progyny, Inc. (PGNY) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Repay Holdings Corporation - Class A (RPAY) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Roper Technologies, Inc. (ROP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Schwab Emerging Markets Equity ETF (SCHE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Schwab International Equity ETF (SCHF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Schwab International Small-Cap Equity ETF (SCHC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Investment Portfolio ⇒ SCHWAB US BROAD MARKET ETF [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Investment Portfolio ⇒ SCHWAB US DIVIDEND EQUITY ETF [EF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Schwab Investment Portfolio ⇒ SCHWAB US SMALL CAP ETF [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Investment Portfolio ⇒ SCHWAB VALUE ADVANTAGE MONEY INVESTOR SHARES [EF]		\$50,001 - \$100,000	Capital Gains	\$2,501 - \$5,000	\$1,001 - \$2,500
Schwab Investment Portfolio ⇒ SELECT SECTOR HEALTH CARE SPDR ETF [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Investment Portfolio ⇒ Skyworks Solutions, Inc. (SWKS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Southwest Airlines Company (LUV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ SPDR S&P 600 SMALL CAP GROWTH ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ SPDR S&P China ETF (GXC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Topgolf Callaway Brands Corp. (MODG) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ Ultra Clean Holdings, Inc. (UCTT) [ST]		\$1,001 - \$15,000	None		
Schwab Investment Portfolio ⇒ United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ US TREASUR NT 2.75%02/24UST NOTE DUE 02/15/24 [GS]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ US TREASURY BILL24U S T BILL DUE 02/08/24 [GS]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Investment Portfolio ⇒ US TREASURY BILL24U S T BILL DUE 02/29/24 [GS]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ US TREASURY BILL24U S T BILL DUE 03/07/24 [GS]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ US TREASURY BILL24U S T BILL DUE 04/11/24 [GS]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ US TREASURY BILL24U S T BILL DUE 05/09/24 [GS]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Investment Portfolio ⇒ US TREASURY BILL24U S T BILL DUE 06/13/24 [GS]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ VanEck Biotech ETF (BBH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ VanEck Environmental Services ETF (EVX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ Vanguard Industrials ETF (VIS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Investment Portfolio ⇒ VANGUARD VALUE ETF [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Investment Portfolio ⇒ WPP plc American Depositary Shares (WPP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Robo Portfolio Investment Account ⇒ Schwab Emerging Markets Equity ETF (SCHE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Robo Portfolio Investment Account ⇒ Schwab Fundamental Emerging Markets Large Company Index ETF (FNDE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Robo Portfolio Investment Account ⇒ Schwab Fundamental International Large Company Index ETF (FNDF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Robo Portfolio Investment Account ⇒ Schwab Fundamental International Small Company Index ETF (FNDC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Robo Portfolio Investment Account ⇒ Schwab Fundamental U.S. Large Company Index ETF (FNDX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Robo Portfolio Investment Account ⇒ Schwab Fundamental U.S. Small Company Index ETF (FNDX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Robo Portfolio Investment Account ⇒ Schwab International Equity ETF (SCHF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Robo Portfolio Investment Account ⇒ Schwab U.S. Large-Cap ETF (SCHX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Robo Portfolio Investment Account ⇒ Schwab U.S. Small-Cap ETF (SCHA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Robo Portfolio Investment Account ⇒ Vanguard Tax-Exempt Bond ETF (VTEB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ DODBX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ DODFX [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Roth IRA ⇒ DODGX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ DODIX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ DODLX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ Fidelity MSCI Energy Index ETF (FENY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ Invesco S&P 500 Equal Weight Health Care ETF (RSPH)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[ST]					
Schwab Roth IRA ⇒ Invesco S&P 500 Equal Weight Technology ETF (RSPT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ Schwab Emerging Markets Equity ETF (SCHE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ Schwab International Equity ETF (SCHF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ Schwab U.S. Small-Cap ETF (SCHA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ Schwab US Dividend Equity ETF (SCHD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Roth IRA ⇒ SPDR S&P Global Dividend (WDIV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Traditional IRA ⇒ DODBX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Traditional IRA ⇒ DODFX [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Traditional IRA ⇒ DODGX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Traditional IRA ⇒ DODIX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Traditional IRA ⇒ DODLX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Traditional IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Traditional IRA ⇒ Schwab Emerging Markets Equity ETF (SCHE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Traditional IRA ⇒ Schwab International Small-Cap Equity ETF (SCHC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Traditional IRA ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Traditional IRA ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Traditional IRA ⇒ Schwab US Dividend Equity ETF (SCHD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Fifth Wall	Salary	N/A	\$17,550.00
Stanford University	Salary	N/A	\$284.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Chairman	Friends of Dartmouth Swimming and Diving Board

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

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- 401K Plan
DESCRIPTION: Fidelity 401K Plan from Wasatch Global Investors
- Schwab Clean Tech Investment Portfolio
DESCRIPTION: Schwab Clean Tech Account
- Schwab Investment Portfolio
DESCRIPTION: Schwab Investment Portfolio
- Schwab Robo Portfolio Investment Account
DESCRIPTION: Schwab Robo Portfolio Investment Account
- Schwab Roth IRA
DESCRIPTION: Schwab Roth IRA Account
- Schwab Traditional IRA
DESCRIPTION: Schwab Traditional IRA Account

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Joby Bernstein , 02/2/2024