



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** David L. Young  
**Status:** Congressional Candidate  
**State/District:** CO08

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2025  
**Filing Date:** 10/10/2025  
**Period Covered:** 01/01/2024– 09/02/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bitcoin [CT]		\$1,001 - \$15,000	None		
Chase Checking [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Chase Savings [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Chicago condo [RP]	SP	\$100,001 - \$250,000	None		
LOCATION: Chicago/Cook, IL, US					
Chico's FAS, Inc. (CHS) [ST]	JT	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Denver condo [RP]	JT	\$500,001 - \$1,000,000	None		
LOCATION: Denver/Denver, CO, US					
Edward Jones Money Market [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ethereum [CT]		\$1,001 - \$15,000	None		
GE Aerospace Common Stock (GE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
GE Vernova Inc. Common Stock (GEV) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Greeley home [RP]	JT	\$250,001 - \$500,000	None		
LOCATION: Greeley/Weld, CO, US					
Home Depot, Inc. (HD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
NWM Whole Life [WU]		\$50,001 - \$100,000	None		
Oil and Gas Mineral Rights [MO]	JT	Undetermined	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
LOCATION: Greeley/Weld, CO, US					
Pfizer, Inc. Common Stock (PFE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Security Service FCU Certificate of Deposit [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
Stryker Corporation Common Stock (SYK) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Xcel Energy Inc. - Common Stock (XEL) [ST]	SP	\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Ameriprise IRA ⇒ Allspring Core Bond Fd Inst (MBFIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: ALLSPRING CORE BOND INSTL CL					
Ameriprise IRA ⇒ BlackRock Tactical Opportunities Fund - Institutional (PBAIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: BLACKROCK TACTICAL OPPTYS INSTL CL					
Ameriprise IRA ⇒ Calamos Market Neutral Fd Cl I (CMNIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: CALAMOS MARKET NEUTRAL INCOME CL I					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise IRA ⇒ Columbia Adaptive Risk Allocation Fund Class I (CRAZX) [MF]  DESCRIPTION: COLUMBIA ADAPTIVE RISK ALLOC INSTL CL		\$100,001 - \$250,000	Tax-Deferred		
Ameriprise IRA ⇒ Columbia Multi Strategy Alternatives Fd Class I (CLAZX) [MF]  DESCRIPTION: COLUMBIA MULTI STRATEGY ALTS INSTL CL		\$15,001 - \$50,000	Tax-Deferred		
Ameriprise IRA ⇒ IRA Cash and Cash Equivalents [IH]  DESCRIPTION: IRA Cash and Cash Equivalents	SP	\$1 - \$1,000	Tax-Deferred		
Ameriprise IRA ⇒ IRA Cash and Cash Equivalents [IH]  DESCRIPTION: IRA Cash and Cash Equivalents		\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]  DESCRIPTION: ISHARES 20+ YR TREASURY BOND ETF		\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]  DESCRIPTION: ISHARES CORE MSCI EAFE ETF	SP	\$1 - \$1,000	Tax-Deferred		
Ameriprise IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]  DESCRIPTION: ISHARES CORE MSCI EMERGING MARKETS ETF	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ iShares iBoxx \$ High Yield Corporate Bond ETF (HYG) [EF]  DESCRIPTION: ISHARES IBOXX \$ HIGH YIELD CORPORATE BOND ETF		\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [EF]  DESCRIPTION: ISHARES IBOXX IBOXX \$INVESTMENT GRADE CORP BOND ETF		\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]  DESCRIPTION: ISHARES JP MORGAN USD EMERGING MARKETS ETF		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF] DESCRIPTION: ISHARES MSCI EAFE ETF		\$15,001 - \$50,000	Tax-Deferred		
Ameriprise IRA ⇒ JPMorgan Global Bond Opportunities Fund I Class (GBOSX) [MF] DESCRIPTION: JPMORGAN GLOBAL BOND OPPTYS CL I	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ JPMorgan International Equity Fund I Class (VSIEX) [MF] DESCRIPTION: JPMORGAN INTL EQUITY CL I	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ JPMorgan Strategic Income Opportunities Fund I Class (JSOSX) [MF] DESCRIPTION: JPMORGAN STRATEGIC INCOME OPPTYS CL I	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ MFS Global Equity Fund - Class I (MWEIX) [MF] DESCRIPTION: MFS GLOBAL EQUITY CL I	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ Neuberger Berman Long Short Fd Instl Cl (NLSIX) [MF] DESCRIPTION: NEUBERGER BERMAN LONG SHORT INSTL CL	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ Principal Fds, Inc.- Principal Capital Apprecation Fund Insti Cl (PWCIX) [MF] DESCRIPTION: PRINCIPAL CAP APPREC INSTL CL	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ SPDR Bloomberg High Yield Bond ETF (JNK) [EF] DESCRIPTION: SPDR BLOOMBERG HIGH YIELD BOND ETF NEW	SP	\$1 - \$1,000	Tax-Deferred		
Ameriprise IRA ⇒ SPDR Gold MiniShares Trust (GLDM) [EF] DESCRIPTION: SPDR GOLD MINISHARES ETF	SP	\$1 - \$1,000	Tax-Deferred		
Ameriprise IRA ⇒ SPDR Portfolio S&P 500 ETF (SPLG) [EF] DESCRIPTION: SPDR PORTFOLIO S&P 500 ETF	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise IRA ⇒ SPDR S&P 500 (SPY) [EF]  DESCRIPTION: SPDR S&P 500 ETF		\$50,001 - \$100,000	Tax-Deferred		
Ameriprise IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]  DESCRIPTION: COMMUNICATION SERVICES SELECT SECTOR SPDR ETF	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ VanEck J. P. Morgan EM Local Currency Bond ET (EMLC) [EF]  DESCRIPTION: VANECK JPM EMERGING MARKETS LOCAL CURRENCY BOND ETF	SP	\$1 - \$1,000	Tax-Deferred		
Ameriprise IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]  DESCRIPTION: VANGUARD FTSE EMERGING MARKETS ETF		\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]  DESCRIPTION: VANGUARD INTERMEDIATE TERM CORP BOND ETF	SP	\$1 - \$1,000	Tax-Deferred		
Ameriprise IRA ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]  DESCRIPTION: VANGUARD SHORT TERM CORP BOND ETF	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]  DESCRIPTION: VANGUARD TOTAL BOND MARKET ETF	SP	\$1 - \$1,000	Tax-Deferred		
Ameriprise IRA ⇒ Virtus AlphaSimplex Managed Futures Strategy Fund Class I (ASFYX) [MF]  DESCRIPTION: VIRTUS ALPHASIMPLEX MANAGED FUTURES STRATEGY CL I	SP	\$1 - \$1,000	Tax-Deferred		
Ameriprise Roth IRA ⇒ Allspring Special Large Cap Value - I (EIVIX) [MF]  DESCRIPTION: ALLSPRING SPECIAL LARGE CAP VALUE INSTL CL	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ Allspring Special Large Cap Value - I (EIVIX) [MF]  DESCRIPTION: ALLSPRING SPECIAL LARGE CAP VALUE INSTL CL		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
First Eagle Overseas Fund Class I (SGOIX) [MF] DESCRIPTION: FIRST EAGLE OVERSEAS CL I					
Ameriprise Roth IRA ⇒ First Eagle Overseas Fund Class I (SGOIX) [MF] DESCRIPTION: FIRST EAGLE OVERSEAS CL I	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ Goldman Sachs GQG Partners International Opportunities Fund - Investor Shares (GSINX) [MF] DESCRIPTION: GOLDMAN SACHS GQG PARTNERS INTL OPPTYS INVESTOR CL	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ Goldman Sachs GQG Partners International Opportunities Fund - Investor Shares (GSINX) [MF] DESCRIPTION: GOLDMAN SACHS GQG PARTNERS INTL OPPTYS INVESTOR CL		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF] DESCRIPTION: ISHARES 10-20 YR TREASURY BOND ETF		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF] DESCRIPTION: ISHARES 10-20 YR TREASURY BOND ETF	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF] DESCRIPTION: ISHARES 3-7YR TREASURY BOND ETF	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF] DESCRIPTION: ISHARES 3-7YR TREASURY BOND ETF		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF] DESCRIPTION: ISHARES 7-10YR TREASURY BOND ETF	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF] DESCRIPTION: ISHARES 7-10YR TREASURY BOND ETF		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF] DESCRIPTION: ISHARES CORE MSCI EMERGING MARKETS ETF	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise Roth IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF] DESCRIPTION: ISHARES CORE MSCI EMERGING MARKETS ETF		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ John Hancock Fds II Strategic Income Opportunities Fd Class I (JIPIX) [MF] DESCRIPTION: JOHN HANCOCK STRATEGIC INCOME OPPTYS CL I		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ John Hancock Fds II Strategic Income Opportunities Fd Class I (JIPIX) [MF] DESCRIPTION: JOHN HANCOCK STRATEGIC INCOME OPPTYS CL I	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ John Hancock US Global Leaders Growth Fund Class I (USLIX) [MF] DESCRIPTION: JOHN HANCOCK U S GLOBAL LEADERS GROWTH CL I	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ John Hancock US Global Leaders Growth Fund Class I (USLIX) [MF] DESCRIPTION: JOHN HANCOCK U S GLOBAL LEADERS GROWTH CL I		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ JPMorgan Core Plus Bond Fund I Class (HLIPX) [MF] DESCRIPTION: JPMORGAN CORE PLUS BOND CL I		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ JPMorgan Core Plus Bond Fund I Class (HLIPX) [MF] DESCRIPTION: JPMORGAN CORE PLUS BOND CL I	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ JPMorgan Large Cap Value Fund I Class (HLQVX) [MF] DESCRIPTION: JPMORGAN LARGE CAP VALUE CL I	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ JPMorgan Large Cap Value Fund I Class (HLQVX) [MF] DESCRIPTION: JPMORGAN LARGE CAP VALUE CL I		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ Macquarie Large Cap Growth Fund Institutional (IYGIX) [MF] DESCRIPTION: MACQUARIE LARGE CAP GROWTH CL I		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise Roth IRA ⇒ Macquarie Large Cap Growth Fund Institutional (IYGIX) [MF]  DESCRIPTION: MACQUARIE LARGE CAP GROWTH CL I	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ PGIM Total Return Bond Fund Class Z (PDBZX) [MF]  DESCRIPTION: PGIM TOTAL RETURN BOND CL Z	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ PGIM Total Return Bond Fund Class Z (PDBZX) [MF]  DESCRIPTION: PGIM TOTAL RETURN BOND CL Z		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ Roth IRA Cash and Cash Equivalents [IH]  DESCRIPTION: Roth IRA Cash and Cash Equivalents	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ Roth IRA Cash and Cash Equivalents [IH]  DESCRIPTION: Roth IRA Cash and Cash Equivalents		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ SPDR Portfolio S&P 500 ETF (SPLG) [EF]  DESCRIPTION: SPDR PORTFOLIO S&P 500 ETF	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ SPDR Portfolio S&P 500 ETF (SPLG) [EF]  DESCRIPTION: SPDR PORTFOLIO S&P 500 ETF		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ The Hartford International Value Fund Class I (HILIX) [MF]  DESCRIPTION: HARTFORD INTL VALUE CL I		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ The Hartford International Value Fund Class I (HILIX) [MF]  DESCRIPTION: HARTFORD INTL VALUE CL I	SP	\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]  DESCRIPTION: VANGUARD SMALL CAP ETF	SP	\$1,001 - \$15,000	None		



Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise Roth IRA ⇒ Vanguard Small-Cap ETF (VB) [EF] DESCRIPTION: VANGUARD SMALL CAP ETF		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ Virtus Ceredex Large-Cap Value Equity Fund I (STVTX) [MF] DESCRIPTION: VIRTUS CEREDEX LARGE CAP VALUE EQUITY INSTL CL		\$1,001 - \$15,000	None		
Ameriprise Roth IRA ⇒ Virtus Ceredex Large-Cap Value Equity Fund I (STVTX) [MF] DESCRIPTION: VIRTUS CEREDEX LARGE CAP VALUE EQUITY INSTL CL	SP	\$1,001 - \$15,000	None		
Equitable 457(b) ⇒ EQ/Com Stck Index [HE] DESCRIPTION: EQ/Com Stck Index	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable 457(b) ⇒ EQ/Int Val Managed Vol [HE] DESCRIPTION: EQ/Int Val Managed Vol	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable 457(b) ⇒ EQ/Janus Enterprise [HE] DESCRIPTION: EQ/Janus Enterprise	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable 457(b) ⇒ EQ/Lg Cap Grw Managed Vol [HE] DESCRIPTION: EQ/Lg Cap Grw Managed Vol	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable 457(b) ⇒ EQ/Morgan Stanley Sml Cap Grw [HE] DESCRIPTION: EQ/Morgan Stanley Sml Cap Grw	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable 457(b) ⇒ EQ/Value Equity [HE] DESCRIPTION: EQ/Value Equity	SP	\$1,001 - \$15,000	Tax-Deferred		
Equitable 457(b) ⇒ Guaranteed Interest Account [IH] DESCRIPTION: Guaranteed Interest Account	SP	\$1,001 - \$15,000	Tax-Deferred		
PERAPlus 401(k) Plan ⇒ PERAdvantage Capital Preservation Fund [HE]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Stable Value					
PERAPlus 401(k) Plan ⇒ PERAdvantage Fixed Income Fund [HE]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Fixed Income					
PERAPlus 401(k) Plan ⇒ PERAdvantage Income Fund [HE]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Target Date					
PERAPlus 401(k) Plan ⇒ PERAdvantage International Stock Fund [HE]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: International Equity					
PERAPlus 401(k) Plan ⇒ PERAdvantage U.S. Large Cap Stock Fund [HE]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Large Cap Equity					
PERAPlus 401(k) Plan ⇒ PERAdvantage U.S. Large Cap Stock Fund [HE]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: U.S. Large Cap Stock Fund					
The PERA DC Plan ⇒ PERAdvantage Capital Preservation Fund [HE]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Stable Value					
The PERA DC Plan ⇒ PERAdvantage Fixed Income Fund [HE]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Fixed Income					
The PERA DC Plan ⇒ PERAdvantage Income Fund [HE]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Target Date					
The PERA DC Plan ⇒ PERAdvantage Income Fund [HE]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Target Date Fund					
The PERA DC Plan ⇒ PERAdvantage International Stock Fund [HE]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: International Equity					
The PERA DC Plan ⇒ PERAdvantage SRI Fund [HE]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Multi-Asset					
The PERA DC Plan ⇒ PERAdvantage U.S. Large Cap Stock Fund [HE]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Large Cap Equity					
The PERA DC Plan ⇒ PERAdvantage U.S. SMID Cap Stock Fund [HE]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Small/Mid Cap Equity					

\* Investment Vehicle 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
State of Colorado	State Treasurer (self)	\$67,846.64	\$101,769.96
State of Colorado	State Representative (spouse)	N/A	\$45,184.00
Colorado Public Employee Retirement Association	Retirement benefit (self)	\$28,965.97	\$53,202.97
Colorado Public Employee Retirement Association	Retirement benefit (spouse)	\$54,636.88	\$80,742.18

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	FMNA through MegaStar Financial Corp. as the mortgage servicer	March 2023	Mortgage on Denver condo	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Colorado PERA
Director	Invest Ahead
Director	Donor Alliance Foundation Board (Organ and Tissue)
Council Member	El Pomar North Council

Position	Name of Organization
Board Member	University of Colorado Denver School of Education and Human Development Alumni Advisory Board
Board Chair	State of Colorado Public School Fund Investment Board
Board Chair	State of Colorado Continuation of Benefits Board
Board Chair	State of Colorado SecureSavings Board
Board Chair	State of Colorado Loans for Increasing Mainstreet Business Economic Resiliency (CLIMBER) Program Ove
Board Chair	State of Colorado Building Urgent Infrastructure and Leveraging Dollars (BUILD) Program Oversight Bo
Board Member	State of Colorado Claims Board
Committee Member	University of Colorado Investment Advisory Committee
Council Member	State of Colorado Financial Empowerment Council
Committee Member	State of Colorado First Step Advisory Committee
Committee Member	State of Correctional Industries Advisory Committee
Western Region Vice President	National Association of State Treasurers Board of Directors
Committee Member	National Association of State Treasurers Pensions and Retirement Committee
Committee Member	National Association of State Treasurers Program and Learning Committee
Committee Member	National Association of State Treasurers Policy and Advocacy Committee
Member	Democratic Treasurers Association
Network Member	For The Long Term
Council Chair	Georgetown Center for Retirement Initiatives State Advisory Council

**SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

**SCHEDULE A INVESTMENT VEHICLE DETAILS**

- o PERAPlus 401(k) Plan (Owner: SP)
- o The PERA DC Plan (Owner: SP)
- o Ameriprise IRA (Owner: SP)

- Ameriprise Roth IRA (Owner: SP)
- Equitable 457(b) (Owner: SP)
- Ameriprise IRA
- Ameriprise Roth IRA
- PERAPlus 401(k) Plan
- The PERA DC Plan

## 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:** David L. Young , 10/10/2025