



Filing ID #10072636

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

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

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|----------------------|----------------|-------------------------------|-----------------------|
| Ameriprise IRA ⇒ SPDR S&P 500 (SPY) [EF] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| DESCRIPTION: SPDR S&P 500 ETF | | | | | |
| Ameriprise IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: COMMUNICATION SERVICES SELECT SECTOR SPDR ETF | | | | | |
| Ameriprise IRA ⇒ VanEck J. P. Morgan EM Local Currency Bond ET (EMLC) [EF] | SP | \$1 - \$1,000 | Tax-Deferred | | |
| DESCRIPTION: VANECK JPM EMERGING MARKETS LOCAL CURRENCY BOND ETF | | | | | |
| Ameriprise IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: VANGUARD FTSE EMERGING MARKETS ETF | | | | | |
| Ameriprise IRA ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF] | SP | \$1 - \$1,000 | Tax-Deferred | | |
| DESCRIPTION: VANGUARD INTERMEDIATE TERM CORP BOND ETF | | | | | |
| Ameriprise IRA ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: VANGUARD SHORT TERM CORP BOND ETF | | | | | |
| Ameriprise IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF] | SP | \$1 - \$1,000 | Tax-Deferred | | |
| DESCRIPTION: VANGUARD TOTAL BOND MARKET ETF | | | | | |
| Ameriprise IRA ⇒ Virtus AlphaSimplex Managed Futures Strategy Fund Class I (ASFYX) [MF] | SP | \$1 - \$1,000 | Tax-Deferred | | |
| DESCRIPTION: VIRTUS ALPHASIMPLEX MANAGED FUTURES STRATEGY CL I | | | | | |
| Ameriprise Roth IRA ⇒ Allspring Special Large Cap Value - I (EIVIX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: ALLSPRING SPECIAL LARGE CAP VALUE INSTL CL | | | | | |
| Ameriprise Roth IRA ⇒ Allspring Special Large Cap Value - I (EIVIX) [MF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: ALLSPRING SPECIAL LARGE CAP VALUE INSTL CL | | | | | |
| 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] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: FIRST EAGLE OVERSEAS CL I | | | | | |
| 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] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: ISHARES CORE MSCI EMERGING MARKETS ETF | | | | | |
| Ameriprise Roth IRA ⇒ John Hancock Fds II Strategic Income Opportunities Fd Class I (JIPIX) [MF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: JOHN HANCOCK STRATEGIC INCOME OPPTYS CL I | | | | | |
| Ameriprise Roth IRA ⇒ John Hancock Fds II Strategic Income Opportunities Fd Class I (JIPIX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: JOHN HANCOCK STRATEGIC INCOME OPPTYS CL I | | | | | |
| Ameriprise Roth IRA ⇒ John Hancock US Global Leaders Growth Fund Class I (USLIX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: JOHN HANCOCK U S GLOBAL LEADERS GROWTH CL I | | | | | |
| Ameriprise Roth IRA ⇒ John Hancock US Global Leaders Growth Fund Class I (USLIX) [MF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: JOHN HANCOCK U S GLOBAL LEADERS GROWTH CL I | | | | | |
| Ameriprise Roth IRA ⇒ JPMorgan Core Plus Bond Fund I Class (HLIPX) [MF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: JPMORGAN CORE PLUS BOND CL I | | | | | |
| Ameriprise Roth IRA ⇒ JPMorgan Core Plus Bond Fund I Class (HLIPX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: JPMORGAN CORE PLUS BOND CL I | | | | | |
| Ameriprise Roth IRA ⇒ JPMorgan Large Cap Value Fund I Class (HLQVX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: JPMORGAN LARGE CAP VALUE CL I | | | | | |
| Ameriprise Roth IRA ⇒ JPMorgan Large Cap Value Fund I Class (HLQVX) [MF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: JPMORGAN LARGE CAP VALUE CL I | | | | | |
| Ameriprise Roth IRA ⇒ Macquarie Large Cap Growth Fund Institutional (IYGIX) [MF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: MACQUARIE LARGE CAP GROWTH CL I | | | | | |

| 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] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: MACQUARIE LARGE CAP GROWTH CL I | | | | | |
| Ameriprise Roth IRA ⇒ PGIM Total Return Bond Fund Class Z (PDBZX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: PGIM TOTAL RETURN BOND CL Z | | | | | |
| Ameriprise Roth IRA ⇒ PGIM Total Return Bond Fund Class Z (PDBZX) [MF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: PGIM TOTAL RETURN BOND CL Z | | | | | |
| Ameriprise Roth IRA ⇒ Roth IRA Cash and Cash Equivalents [IH] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: Roth IRA Cash and Cash Equivalents | | | | | |
| Ameriprise Roth IRA ⇒ Roth IRA Cash and Cash Equivalents [IH] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: Roth IRA Cash and Cash Equivalents | | | | | |
| Ameriprise Roth IRA ⇒ SPDR Portfolio S&P 500 ETF (SPLG) [EF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: SPDR PORTFOLIO S&P 500 ETF | | | | | |
| Ameriprise Roth IRA ⇒ SPDR Portfolio S&P 500 ETF (SPLG) [EF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: SPDR PORTFOLIO S&P 500 ETF | | | | | |
| Ameriprise Roth IRA ⇒ The Hartford International Value Fund Class I (HILIX) [MF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: HARTFORD INTL VALUE CL I | | | | | |
| Ameriprise Roth IRA ⇒ The Hartford International Value Fund Class I (HILIX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: HARTFORD INTL VALUE CL I | | | | | |
| Ameriprise Roth IRA ⇒ Vanguard Small-Cap ETF (VB) [EF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: VANGUARD SMALL CAP ETF | | | | | |

| 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] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: VANGUARD SMALL CAP ETF | | | | | |
| Ameriprise Roth IRA ⇒ Virtus Ceredex Large-Cap Value Equity Fund I (STVTX) [MF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: VIRTUS CEREX LARG CAP VALUE EQUITY INSTL CL | | | | | |
| Ameriprise Roth IRA ⇒ Virtus Ceredex Large-Cap Value Equity Fund I (STVTX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: VIRTUS CEREX LARG CAP VALUE EQUITY INSTL CL | | | | | |
| Equitable 457(b) ⇒ EQ/Com Stck Index [HE] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: EQ/Com Stck Index | | | | | |
| Equitable 457(b) ⇒ EQ/Int Val Managed Vol [HE] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: EQ/Int Val Managed Vol | | | | | |
| Equitable 457(b) ⇒ EQ/Janus Enterprise [HE] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: EQ/Janus Enterprise | | | | | |
| Equitable 457(b) ⇒ EQ/Lg Cap Grw Managed Vol [HE] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: EQ/Lg Cap Grw Managed Vol | | | | | |
| Equitable 457(b) ⇒ EQ/Morgan Stanley Sml Cap Grw [HE] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: EQ/Morgan Stanley Sml Cap Grw | | | | | |
| Equitable 457(b) ⇒ EQ/Value Equity [HE] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: EQ/Value Equity | | | | | |
| Equitable 457(b) ⇒ Guaranteed Interest Account [IH] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: Guaranteed Interest Account | | | | | |
| 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

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