



Filing ID #10066244

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Katherine M. Clark
Status: Member
State/District: MA05

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 05/15/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Capital One Savings Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DC Co-op [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Washington, DC, US					
Eastern Bank Account [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Eversource Smartsolar [MO]	SP	Undetermined	MA Solar Energy Credit	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Revere, MA, US					
Family Home (non-primary) [RP]	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Truro, MA, US					
Massachusetts state pension [PE]		Undetermined	None		<input type="checkbox"/>
Sequoia Fund (SEQUX) [MF]	JT	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Fidelity Brokerage Account ⇒	JT	\$100,001 -	Dividends	\$5,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Cash Reserves (FDRXX) [MF]		\$250,000		\$15,000	<input type="checkbox"/>
Fidelity Brokerage Account ⇒ SPDR S&P 500 (SPY) [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Brokerage Account ⇒ United States Treasury Notes [GS] DESCRIPTION: Notes held in 2023 matured in 2024	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Rollover IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Rollover IRA ⇒ SPDR S&P 500 ETF Trust (SPY) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Rollover IRA ⇒ United States Treasury Notes [GS] DESCRIPTION: Fully matured 2/15/24	SP	None	Tax-Deferred		<input type="checkbox"/>
Fidelity Rollover IRA ⇒ United States Treasury Notes [GS] DESCRIPTION: Maturity date 7/31/25	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Apple Inc. (AAPL) [ST]		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Federal Farm Credit Banks Bond [GS] DESCRIPTION: Full call on 1/24/24; 6.150%; 03/01/2033		None	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Ford Motor Company (F) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Judith S. Clark Irrevocable Trust ⇒ FS Energy and Power Fund [HE]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ GDB Debt Recovery Auth of Commonwealth of Puerto Rico [GS] DESCRIPTION: 7.50%; 08/20/40		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Microsoft Corporation (MSFT) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ SPDR S&P 500 (SPY) [EF]		\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ United States Treasury Notes [GS] DESCRIPTION: Fully matured 11/15/24		None	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Verizon Communications Inc. (VZ) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Walt Disney Company (DIS) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Katherine Clark Traditional IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Katherine Clark Traditional IRA ⇒ SPDR S&P 500 (SPY) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Katherine Clark Traditional IRA ⇒ United States Treas 4.25%; 12/31/24 [GS] DESCRIPTION: Fully matured		None	Tax-Deferred		<input checked="" type="checkbox"/>
Katherine M. Clark Exempt Trust ⇒ Acacia Partners LP [HE]		\$1,001 - \$15,000	Partnership Income	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Katherine M. Clark Exempt Trust ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Katherine M. Clark Exempt Trust ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Exempt Trust ⇒ SPDR S&P 500 (SPY) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Acacia Partners LP [HE]		\$1,001 - \$15,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Annaly Capital Management Inc (NLY) [RE]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Apple Inc. (AAPL) [ST]		\$250,001 - \$500,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Bank of America Corporation (BAC) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Fidelity - Cash [BA]		\$250,001 - \$500,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ International Business Machines Corporation (IBM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Katherine M. Clark Separate Share Trust ⇒ Oakmark Fund Investor Class (OAKMX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Ruane, Cunniff, & Goldfarb Inc. [PS]		\$100,001 - \$250,000	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: investment adviser COMMENTS: This inherited asset is subject to mandatory buyback outside the control and/or consent of Katherine Clark or her agents.					
Katherine M. Clark Separate Share Trust ⇒ Schwab International Equity ETF (SCHF) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ SPDR S&P 500 (SPY) [EF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ United States Treasury Notes [GS]		None	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Fully matured					
Katherine M. Clark Separate Share Trust ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Blue Chip Growth Fund Class K (FBGKX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Massachusetts BBO Elective Deferral Plan ⇒	SP	\$50,001 -	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Dividend Growth Fund Class K (FDGKX) [MF]		\$100,000			
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFEX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
PERAPlus 401(K) Plan ⇒ PERAdvantage 2030 Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
PERAPlus 401(K) Plan ⇒ PERAdvantage US Large Cap Stock [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Katherine Clark Traditional IRA ⇒ United States Treasury Notes [GS]		01/23/2024	P	\$100,001 - \$250,000	
Fidelity Brokerage Account ⇒ United States Treasury Notes [GS]	JT	02/16/2024	P	\$100,001 - \$250,000	
Judith S. Clark Irrevocable Trust ⇒ New York Community Bancorp, Inc. Common Stock (NYCB) [ST]		03/01/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ New York Community Bancorp, Inc. Common Stock (NYCB) [ST]		03/01/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Ruane, Cunniff, & Goldfarb Inc. [PS]		01/31/2024	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LOCATION: US DESCRIPTION: investment adviser					
Fidelity Rollover IRA ⇒ United States Treasury Notes [GS]	SP	02/16/2024	P	\$100,001 - \$250,000	
DESCRIPTION: Maturity date 7/31/25					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Katherine M. Clark Separate Share Trust ⇒ Oakmark Fund Investor Class (OAKMX) [MF]		12/19/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	12/30/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	12/04/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	11/06/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	10/02/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	09/04/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	08/01/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	07/02/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	06/04/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	05/01/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	04/05/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	03/06/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	02/02/2024	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 Fund (FFFEX) [MF]	SP	01/04/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	12/04/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	12/04/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	11/06/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	11/06/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	10/02/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	10/02/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	09/04/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	09/04/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	08/01/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	08/01/2024	P	\$1,001 - \$15,000	
Fidelity Brokerage Account ⇒ SPDR S&P 500 (SPY) [EF]	JT	01/03/2024	P	\$100,001 - \$250,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	07/02/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	07/02/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	06/04/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	06/04/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	05/01/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	05/01/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	04/05/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	04/05/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	03/06/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	03/06/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	02/02/2024	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]	SP	02/02/2024	P	\$1,001 - \$15,000	

* 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
Massachusetts Board of Bar Overseers	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Capitol Hill Tower Housing Cooperative, Inc.	September 2021	Co-op building loan	\$100,001 - \$250,000
JT	Valon Mortgage, Inc.	September 2021	Mortgage (primary residence)	\$500,001 - \$1,000,000
COMMENTS: Previously reported as Nationstar Mortgage LLC d/b/a Mr. Cooper - mortgage transferred in 2024.				

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
July 1997	Katherine M. Clark and the Commonwealth of Massachusetts	Future Pension
September 1991	Katherine M. Clark and the state of Colorado (PERAPlus, formerly known as COPERA)	Continued participation in an employee benefit program

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Judith S. Clark Irrevocable TrustPERAPlus 401(K) PlanKatherine M. Clark Separate Share Trust DESCRIPTION: inherited April 5, 2019Katherine M. Clark Exempt Trust

DESCRIPTION: Inherited April 5, 2019

- Katherine Clark Traditional IRA
- Fidelity Rollover IRA (Owner: SP)
DESCRIPTION: Transferred from Amerprise in September 2021.
- Fidelity Brokerage Account (Owner: JT)
LOCATION: US
- Massachusetts BBO IRA (Owner: SP)
- Massachusetts BBO Elective Deferral Plan (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

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

COMMENTS

The dependent assets, D3 Irrevocable Trust, have been removed from the CY 2024 report since the filer's son is no longer a dependent.

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: Hon. Katherine M. Clark , 05/15/2025