Name: FINANCIAL DISCLOSURE STATEMENT **UNITED STATES HOUSE OF REPRESENTATIVES** FILER STATUS JARY JAMES HALMER U.S. House of Representatives Employing Office: New Officer or Employee Candidates - Date of Election: New Member of or Candidate for State: AL District: 06 State: Daytime Telephone: For New Members, Candidates, and New Employees FORM B Period Covered: January 1, 2014. to **VECENGER 31, 2014**. Check if Amendment (Office Use Only)

DELIVERSO 21 HAND

LEGISLATIVE RESOURCE CENTER

2015 KAY 14 AM 11: 32

U.S. NOUSE OF REPLESENTATIVES

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

| | THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE | NLY THE SCHEDULE | THIS FORM INCLUDES O |
|----------|---|------------------|---|
| | ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES" | CORRESPONDING S | ATTACH THE |
| Yes No | J. Did you receive compensation of more than \$5,000 from a single Yes No source in the current year and two prior years? | Yes No | D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period? |
| Yes No X | F. Did you have any reportable agreements or arrangements with an outside entity during the reporting period or in the current calendar year up through the date of filing? | Yes X No | C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period? |
| Yes No | E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing? | Yes X No | A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? Or b. Make more than \$200 in unearned income from any reportable asset during the reporting period? |
| | | | |

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER BOTH OF THESE QUESTIONS

| this report details of such a trust that benefits you, your spouse, or your dependent child? | 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 |
|--|---|
| Yes | |
| | |
| Ž | - |

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? Do not answer "yes" unless you have first consulted with the Committee on Ethics. Yes

<u>₹</u>

X

| | | | | | | | - | S S | requ | | be E × | hor incl | For tha geo | pro For | For \$5,1 | the For | Ĝ₽ | exc and incx incx | der | |
|-----------------|-----------------------|-----------------|-------------------|-------------------|----------------------|-------------------------------------|----------------------------|-------------------------|--|--|--|---|---|---|--|--|---|--|--|-------------------------------------|
| VERNON, ALABAMA | TIMBER LAND INESTMENT | CS SAUWAS BONDS | TO AMERITAN CASH) | THAMBUT THE THAME | WELLS FARCO ABULSORS | ABC Hedge Fund X | Examples: Simon & Schuster | SP Mega Corp. Stock EIF | For a detailed discussion of Schedule A requirements, please refer to the instruction booklet. | If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC), or jointly held with anyone (JT), in the optional column on the far left. | If you have a privately-traded fund that is an Excepted Investment Fund, please check the "EIF" box. | Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan. | For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. | For rental and other real property held for investment, provide a complete address or description, e.g., 'rental property,' and a city and state. | For bank and other cash accounts, total the amount in all interest-bearing accounts. If the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts. | For all IRAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in the account that exceeds the reporting thresholds. | Provide complete names of stocks and mutual funds (do not use only ticker symbols). | production of income and with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or source of income that generated more than \$200 in "unearned" income during the year. | Identify (a) each asset held for investment or | BLOCK A Asset and/or Income Source |
| H | | | | | | | | | None | | | | | | > | T | | valua used: If an becau | ndic I | |
| | | | | | | | | | \$1-\$1,000 | | | | | | QI. | | have | atron 1. 1. assu | aie v | |
| | | < | | | 7 | | Indefinite | | \$1,001-\$15 | ,000 | | | | | C | , | you have no interest. | metho et waa tgene | alue | |
| | | | ~ | < | | |) Pi | H | \$15,001-\$5 | 0,000 | | | | | | _ | erest. | d othe s sold rated i | of ass | |
| | | | _ | _ | | | | × | \$50,001-\$1 | | | | | | п | - | | er than | et al. | _ |
| - | | _ | | | | | | \vdash | \$100,001-\$ | | | | | | т | -{ | , | n fairi ng the e,the | dose | э ше |
| H | | \dashv | Н | | | × | | \vdash | \$250,001-\$ | | | | | | | | ! ! | valuation method other than fair market value, please specify the method used. used. If an asset was sold during the reporting period and is included only because it generated income. The value should be "None." Column M is for assests held by your snouse or dependent child in which | Indicate value of asset at close of the reporting period. If you use a | BLOCK B |
| - | | - | | | | | - | \vdash | \$500,001-\$ | | | | | | 3 | | | t valu | Б | Ass Ass |
| \vdash | | | | | | | | Н | | -\$5,000,000 | | | | | | - | ! | e, pleo Períod Períod Període | orting | et |
| \vdash | | | | | | | | | \$5,000,001 | -\$25,000,000 | | | | | | - | | ase st | peri | |
| | | _ | | | | | | Н | \$25,000,00 | 1-\$50,000,000 | | | | | | : | | becify | Σd. ∓ | |
| | | \dashv | \neg | | | | | Н | Over \$50,0 | 00,000 | | | | | - | | | the n clude d in v | you | |
| | | \dashv | | | | | - | | Spouse/DC | Asset over \$1, | 000,000* | | | | | : | | d only | . es | |
| H | : | < | | | | | | Н | NONE | | | | | | | 1 | period. | | | |
| | | Ì | | | < | | | × | DIVIDEND | S | | | | | | | period. | generate tax-deferred income (such as 529 accounts), you may check the column. Dividends, interest, and even if reinvested, must be disclostor assets held in taxable accounts. If the asset held in taxable income divided in the control of the asset incorporated in the control of the contr | Check all columns that apply. | |
| | | | | | | | | | RENT | | | | | | | | ÿ | tax-d ounts Div | <u>8</u> | |
| H | | | < | ~ | | | | | INTEREST | | | | | | | | Š | eferre | Sumn | √ |
| H | | | | _ | | | <u> </u> | | CAPITAL C | AINS | | | | · · · · | | | i | may in | that | be o ∃E |
| | | | | | | | | | EXCEPTED | D/BLIND TRUS | т | | | | | 1 | 3 | ome (y cha | apph | BLOCK C |
| | | | | | | | | П | TAX-DEFE | RRED | | | | | | | 5 | ax-deferred income (such a ax-deferred income (such a nits), you may check the Dividends, interest, and invested, must be disclothed in taxable accounts the properties of the properties of the properties of the nits of the | | BLOCK C |
| | | | | | | Partnership Income | Royalties | | Other Type (Specify: e. | of Income g., Partnership | Income or F | arm (ncome) | | | | | | 401(k), IRA, or "Tax-Deferred" capital gains, ed as income Check "None" | r accounts that | |
| 1 | | 7 | | | | | | | None | | | | | | _ | | Colu | may check category c Dividends must be a accounts. | Fora | |
| | | | < | | < | | | Ш | \$1-\$200 | · | | | | | - | m which you have no interest. | × | may check the "None category of income Dividends, interest, must be disclosed accounts. Check represents | ssets | |
| Ц | | | | | | | | \square | \$201-\$1,00 | | | | | | = | i av | lis fo | the "income interest in the "income in the income in the income in the income in the income in the "income in t | for wh | |
| \square | | | | _ | | $ldsymbol{ldsymbol{ldsymbol{eta}}}$ | | × | \$1,001-\$2, | | | | | | ~ | | rasse | ncome to therest, closed a Check | tich ye | Ą |
| \square | | | | | | | | Ш | \$2,501-\$5,0 | | | | | | < | | ts he | by chec and ca as inco "None" | ou che | BLOCK D BLOCK D |
| \square | | | | | ļ | <u> </u> _ | | | \$5,001-\$15 | | | | | | ≤ | 4 | d by y | nn. Fi ecking ecapita capita come e if | cked | BLOCK D |
| \square | | | | | | <u> </u> | _ | | \$15,001-\$5 | - | | | | | | 4 | our s | orall g the g the no ii | Tax- | <u>,</u> |
| \square | | | | | | | | \sqcup | \$50,001-\$1 | | | | | | <u> </u> | -1 | pouse | e appropriates, evi | Defen | ome |
| | | | | | | ldash | | | \$100,001-\$ | | | | | | <u></u> | - |) or de | ppriate popriate wen if the held | Bog ` | - |
| | _ | | | | | \vdash | | | | -\$5,000,000 | | | | | × | - | pend | if reliming | 1 Bloc | |
| | | | | | | \vdash | | | Over \$5,00 Spouse/DC | Asset with Inc | ome over \$1 | *000,000 | | | | | Column XII is for assets held by your spouse or dependent child | may check the "None" column. For all other assets indicate the category of income by checking the appropriate box below. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check "None" if no income was earned or peneraled. | For assets for which you checked "Tax-Deferred" in Block C, you | |
| H | | | | | | H | | S(part) | Φ, | | | | | | Leave that except that except \$1,000 | ples folio | | , , , , , | ÷ | - |
| | | | | | | | | ā | S, S(part), or E | | | | | | Leave this column blank if there are no transactions that exceeded \$1,000. | an asset was sold please indicate as follows: (S (part)). | period. If only a portion of | asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 | Indicate if the | BLOCK E |
| 1 | | | | | | ĺ | | | ä | | | | | | ede ctio | S (p | <u>ģ</u> | 3 4 2 2 3 4 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 | # | 30. CK |
| | | | | | | ı | | | ä | | | | | | or Si a E | 2 g v | 3 4 | 350 % | | ₩. mi |

| Asset and/or Income Source | | | | | ASSET NAME EIF | THE BYING OF ELL THE BOTH | CHARGLES SCHWAB IRA | -GOUT MONEY FUND | FUND TAISTL CL | - PINCO STORY TERM | | PAATNERS FO | - DIAMONT FUND CL | THE CHESCAN PULL | AND PLANT ASSET ALL | - 5 15 205- | 16 | ASSET ALVO OF THE STATE | , | -GOUT MONEY FLAND |
|----------------------------|----------|---|------------------------|---|----------------|---------------------------|---------------------|------------------|----------------|--------------------|---|-------------|-------------------|------------------|---------------------|-------------|----|-------------------------|----------|-------------------|
| | > | _ | | None | П | ₹, | | | | | | | | \vdash | | _ | | | Ü | |
| | | | | \$1-\$1,000 | | | | | | | | | | ⊢⊢ | | <u> </u> | | | | |
| | 8 | | | | | - June | | | | | | | | | | <u> </u> | | | | |
| | C | | | \$1,001-\$15,000 | | 150 | | < | | | | | 7 | | | 7 | 7 | | <u> </u> | < |
| | 0 | | | \$15,001-\$50,000 | | | | | | 1 | < | 1 | | 7 | \ | _ | | 5 | | |
| <u> </u> | m | | | \$50,001-\$100,000 | | | | | < | | | | | | | | | | | |
| Value of Asset | 'n | | | \$100,001-\$250,000 | | | | | | | | | | | | <u> </u> | | | ļ | |
| ž Š | ၈ | | | \$250,001-\$500,000 | | | | | | | | | | | | | | Ш | | Ĺ |
| Set | Ξ. | | ********* | \$500,001-\$1,000,000 | | | | | | | | | | | <u> </u> | | | | | |
| | 크 | | | \$1,000,001-\$5,000,000 | | | | | | | | | | | | | | | | |
| | _ | | | \$5,000,001-\$25,000,000 | | | | | | | | | | | | | | | | |
| | ~ | | | \$25,000,001-\$50,000,000 | | | | | | | | | <u> </u> | | | | | | | |
| | | | | Over \$50,000,000 | | | | | | | | | | | | <u> </u> | | | | |
| | ž | | 000,000* | Spouse/DC Asset over \$1,000,000* | | | | | | | | | | | | | | | | ļ |
| | | | | NONE | | | <u> </u> | | | | | | | | | | | | | |
| | | | | DIVIDENDS | | | | | | | | | | | | <u> </u> | | | | _ |
| | _ | _ | | RENT | | | | | | | | | | | | | | | | <u> </u> |
| γŽ | _ | | | INTEREST | | <u> </u> | | | | | | | | | | | | | | |
| Type of Income | 4 | | | CAPITAL GAINS | | | | | | | | | | | | , | | | | |
| Пco | 4 | | Т | EXCEPTED/BLINO TRUST | | | | | | | | | | | | | | | | |
| Щe | 1 | | | TAX-DEFERRED | | | | < | 7 | 7 | 7 | 1 | 7 | 7 | 1 | 1 | 1 | 1 | | 7 |
| | | | (ncome or Farm Income) | Other Type of Income (Specify e.g., Partnership Income or Fari | | | | | | | • | | | | | | | | | |
| | -1 | | | None | | | | \(\) | | | | | 7 | | | | | : | | 1 |
| | = | | | \$1-\$200 | | ヽ | | | | 7 | 7 | | | | | 7 | | | | |
| | = | | | \$201-\$1,000 | | | | | | | | | | • | 7 | | 1 | 1 | | |
| Þ | 2 | | | \$1,001-\$2,500 | | | | | र | | | 7 | | | | | | | | |
| Amount of Income | < | | | \$2,501-\$5,000 | | | | | | | | , | | | | | | | | |
| unt of Inc | ≤ | | | \$5,001-\$15,000 | | | | | | | | | | | | | | | | |
| 9 1 | ≦ | | | \$15,001-\$50,000 | | | | | | | | | | | | | | | | |
| CO | ≦ | | | \$50,001-\$100,000 | | | | | | | | | | | | | | | | |
| 6 | ⊽ | | | \$100,001-\$1,000,000 | | | | | | | | | | | | | | | | |
| | × | | | \$1,000,001-\$5,000,000 | | | | | | | | | | | | | | | | |
| | × | | - | Over \$5,000,000 | | | | | | | | | | | | | | | | |
| | ¥ | | ome over \$1,000,000* | Spouse/DC Asset with Income over \$1,00 | | | | | | | | | | | | | | | | |
| Transaction | | | | P, S. S(part), or E | | | | | | | | | | | | | | | | |

Name: GARY JAMES PALMER

Page_

04

of 2

| Nove | | | | | - | _ | | | | 2 | <u></u> | | Ţ | | 100 | 4 | Se de | Tak ac | 2 | SP AM | 7 C | g | - | | AS | | | (| SCH |
|--|----|---|----|--------|---------|---|--------------|-----------|-----------|----------|------------|------|---------|----------|-------------------------|----------|---------------------------|---------------------------|-----------------|----------|-----|---------------------|----------------------------------|----|--------------------------|-------------------|----------|------------|---|
| None St.431,000 St.431,00 | | | | | | | | , | was bound | Honse | | CASH | | | sudd 4500 la det ETF NL | eriprise | Scharter MSI For Hed 2get | landig Cap Con-wales Cos- | 11 6 St 11 - CC | erion'se | | | | | set and/or Income Source | BLOCK A | | | SCHEDULE A - ASSETS & "UNEARNED INCOME" |
| ### 141,000 ### 15 | | | + | - | + | _ | | - | _ | | 4 | | +- | - | _ | <u> </u> | <u>u</u> | +- | <u> </u> | Щ | E# | _ | ione | | T | | | Ì | 2 0 |
| 1 | _ | | _ | | _ | | <u> </u> | 4 | _ | _ | 4 | | _ | _ | | | | - | _ | | | ┺ | | > | | | | 1 | = |
| | | | | | \perp | | | \perp | | | | | | | | | , | | | | | ┺ | | 60 | | | | | Ž |
| 150.001-1100.000 | | | | | | | İ | ĺ | | 1 | : | | | | | | | | | | | \$1 | 1,001-\$15,000 | C | | | | ļ | <u>></u> |
| 15100,001-3250,000 | | | 1 | \top | 7 | | | | | | | 7 | | | , | | 1 | • | | | | \$1 | 15,001-\$50,000 | 0 | 1 | | | | Ω Z |
| S 1 000,001-15,000,000 S | | | | | | | | T | | | | | T | | ` | | ļ | | | | | \$5 | 50,001-\$100,000 | m | ≤ | : | |] | |
| \$1,000,001-\$25,000,000 | | | | | 7 | | | | | | | | T | | | | | | T | | | \$1 | 100,001-\$250,000 | т | ue | J _B EC | | | - |
| \$1,000,001-\$5,000,000 | | | | | T | | | | | | | | T | | | | | | | | | \$2 | 250,001-\$500,000 | ၈ | 3 | Ř | | Š | ਨੁ |
| S 1 000,001-15,000,000 S | | | | | | | | | | T | | | T | | | | | Ī | | | | \$5 | 500,001-\$1,000,000 | I | sse | 00 | | ì | Ĭ |
| \$25,000,001-\$50,000,000 \$2 | | | | 1 | 7 | | | \exists | | | T | | 7 | \neg | | - | | Т | 1 | | | \$1 | 1,000,001-\$5,000,000 | - | | | | , | ָּדָר |
| Over \$36,000,000 | | | | | 1 | | | | | | | | 1 | | | | | | | | | \$5 | 5,000,001-\$25,000,000 | - | | | | | |
| SpouseCC Asset over \$1,000,000" E | | | | | | | | | | | | | | | | | | | | | | \$2 | 25,000,001-\$50,000,000 | ~ | | | | | |
| NONE DIVIDENDS RENT INTEREST CAPITAL GAINS EXCEPTED/BLIND TRUST TAX-DEFERRED TAX-DEFERRED Dividends Speedy e.g., Partnership income or Farm Income) Partnership income or Farm Income Speedy e.g., Partnership income or Farm Income) Partnership income or Farm Income Partnership income Partnership income or Farm Income Partnership income Partnership income or Farm Income Partnership income P | | | Τ | | | | | | | | | | T | | | | | | T | | | 0 | Over \$50,000,000 | ٦ | | | | | |
| T | | | | | | | | | | | | | | | | | | | | | | Sp | pouse/DC Asset over \$1,000,000* | ĸ | | | | | |
| RENT INTEREST CAPITAL GAINS EXCEPTEDIBLIND TRUST TAX-DEFERRED Other Type of Income (Specify: e.g., Partnership Income or Farm Income) Specify: e.g., Partnership Income or Farm Income) Specify: e.g., Partnership Income or Farm Income) Specify: e.g., Partnership Income or Farm Income) Specific Specif | | | | | | | | | | | | | \prod | | | | | | | | | NK | KONE | | | | | z | |
| INTEREST | | | | | | | | | | | | | | | Ì | | 1 | 1 | | | | DI | DIVIDENDS | | | İ | | Name: | |
| Differ Type of Income (Specify: e.g., Partnership Income or Farm Income) | | | | | | | | | | <u> </u> | \perp | | | | | | | | | | | RI | RENT | | ļ | | (| 1: | |
| Comparison Com | | | | | | | | | | < | <u>, </u> | | | | | | | L | | | | IN | VTEREST | | Typ | | | Jan | ٦ |
| Other Type of Income (Spechy: a.g., Partnership Income or Farm Income) | | | | | | | | | | L | | | | | | | 7 | 1 | | | | C/ | APITAL GAINS | | e of | 9 | | 3 | |
| Other Type of Income (Specify: a.g., Partnership Income or Farm Income) | | | | | | | | _ | | | | | \perp | | | | | | | | | E) | XCEPTED/BLIND TRUST | | lnc | 웃 | | l_{-} | |
| Other Type of Income (Specify: e.g., Partnership Income or Farm Income) | | | | | | | | | | | | | 1 | | <u> </u> | | | | | | | 1/ | AX-DEFERRED | | ome | | | a | ` |
| S1-\$200 | | : | | | | | | | | 1 | | | | | | | | | | | | | - | | | | | ames | |
| S1-\$200 | + | | ╁ | ╁ | + | | - | + | | + | + | | ┿ | - | ₹ | | | - | + | \dashv | | No | lone | | | | ' | 12 | 2 |
| \$201-\$1,000 | + | | ╁ | + | + | | - | \dashv | | ╁ | + | | ┿ | - | \dashv | | - | | + | \dashv | | \$1 | 1-\$200 | = | | | | almei | Ţ |
| \$1,001-\$2,500 | + | | ╁ | + | + | | | \dashv | | - | + | | +- | \dashv | | | - | | + | | | \$2 | 201-\$1,000 | | | | | Ž | |
| \$2,501-\$5,000 | | | ╁ | - | + | | | \dashv | | ╁╌ | + | | ╁ | | | | - | < | + | | | \$ 1 | 1,001-\$2,500 | | | | | 7 | |
| \$1,000,001-\$5,000,000 × Over \$5,000,000 × Spouse/DC Asset with Income over \$1,000,000* | + | | ╁- | + | + | | | + | | + | + | | +- | | \dashv | | | \vdash | + | \dashv | | \$2 | 2,501-\$5,000 | | Ä | | | ! , | |
| \$1,000,000 \$\times\$ \$1,000,000 \times\$ Over \$5,000,000 \times Spouse/DC Asset with income over \$1,000,000* \times | + | | ╁ | +- | + | - | - | + | | | + | | +- | 1 | | | | | + | - | | \$5 | 5,001-\$15,000 | | un d | 만 | | | |
| \$1,000,001-\$1,000,000 × \$1,000,001-\$5,000,000 × Over \$5,000,000 × Spouse/DC Asset with income over \$1,000,000* | + | | ╫ | | + | | H | + | | + | -+ | | ╁ | + | | | | - | + | | | \$1 | 15,001-\$50,000 | | 9 | Š | | | |
| \$1,000,001-\$5,000,000 × \$1,000,001-\$5,000,000 × Over \$5,000,000 × Spouse/DC Asset with income over \$1,000,000* | +- | | + | - | + | | - | \dashv | _ | + | + | | +- | | \dashv | | | - | + | \dashv | | \$5 | 50,001-\$100,000 | | псо | D | | ┝ | 4 |
| \$1,000,001-\$5,000,000 × Over \$5,000,000 ≥ Spouse/DC Asset with Income over \$1,000,000* | + | | ╁ | ╁ | ┿ | | - | + | | + | + | | +- | + | \dashv | | | \vdash | + | 1 | | L | | | me | | | Page | |
| Over \$5,000,000 ≥ Spouse/DC Asset with income over \$1,000,000* ≥ | + | | ╁ | ╁ | + | | - | + | | + | + | | ╁╴ | + | \dashv | | | \vdash | + | \dashv | | \$1 | 1,000,001-\$5,000,000 | | | | | ř | |
| Spouse/DC Asset with Income over \$1,000,000° ≚ | +- | | + | + | + | | - | + | | + | + | | + | + | \dashv | | | \vdash | + | - | | ┺ | | | | | | 4 | j |
| | + | | + | + | + | _ | \vdash | + | | +- | + | | +- | + | | - | | - | + | ┪ | | ↓ | | | |] | | 1 | |
| | + | | + | +- | + | | \vdash | + | | +- | + | | + | \dashv | 1 | | <u> </u> | - | | | | 1 | - | | L | ┥ | | <u>\$</u> | |
| BLOCK E ransaction | | | | | | ļ | | | | | | | | | | | | | | | | P. S. S(part), or E | | | Transaction | BLOCK E | | 13 | |

| 50/ | 55 | Š | | | | - | | 2 % | For require | If you income depend (JT), in | If you Except box. | Exclude: You homes and income during income during interest in, retirement purishing in the control of the cont | For an ow that is no business, geograph | For res provide rental | For ba in all \$5,000 more to | For all 401(k) the acc | Provid (do no | end (b) income income | poguc | | |
|-----------------------|----------------|-------------------------|------------------------|-------------------|-----------|--------------------|------------------|--------------------|--|---|--|--|---|---|--|---|---|---|---|------------------|---------|
| 20/ Co2 | C 5+ | Sletra | 20/00/2 | MILE | Ameriprix | | Examples | ક | a detailed ements, pleass | If you so choose, income source is dependent child (JT), in the options | , have a ted investo | de: Your pe and vacati during the tin, or in ment program | ownership not public ss, the r sphic location | ntal and oth er a compl property," a | ink and oth interest-beat), list every han \$1,000 | II JRAs and plans) provi count that e | e complete tuse only ti | and (b) any other reproduced that generated to neome that generated to neome during the year. | tion of inc | Asset a | |
| Col Contracian Core A | Stret Income A | Blanck Street Inc app A | Blackrock GIbI Alle In | Allianzailand CLA | Prix | ABC Hedge Fund | Simon & Schuster | P Mega Corp. Stock | For a detailed discussion of Schedule requirements, please refer to the instruction booklet. | you may indicate that an a that of your spouse (DC), or jointly held with a column on the far left. | If you have a privately-traded fund that is an Excepted investment Fund, please check the "EIF" box. | Exclude: Your personal residence, including second thomas and vacation homas (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan. | For an ownership interest in a privetely-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. | For rental and other real properly held for investment, provide a complete address or description, e.g., "rental properly," and a city and state. | For bank and other cash accounts, total the amount in all interest-bearing accounts. If the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts. | For all IRAs and other retrement plans (such as 401(k) plans) provide the value for each assel held in the account that exceeds the reporting thresholds. | Provide complete names of stocks and mutual funds (do not use only ticker symbols). | and (b) any other reportable asset or source of income that generated more than \$200 in "unearned" income during the year. | exceeding \$1,000 at the end of the reporting period. | | BLOCK A |
| | | | | | | × | | ED Fr | det. | asset or (SP) or anyone | 는 의 S | cond ental encial deral Plan. | iness the | ment, e.g., | DVer is | 9 d 38 | | | | | _ |
| | | | | | | | | | None | | | | | | > | | you h | If an | Indica valuat used. | | |
| | | | | | | | | | \$1-\$1,000 | | | | | | | <u>'</u> | ave n | asse it | tion r | • | |
| | 7 | | < | ŀ | | | Indefinite | | \$1,001-\$15 | ,000 | | | | | n | | "Column M is for ass, you have no interest. | l was | nethod o eus | • | |
| ۲ | · | 7 | | Īζ | | | 7 8 | | \$15,001-\$5 | 0,000 | | | | | 0 | 1 | "Column M is for assets held by your spouse or dependent child in which you have no interest. | If an asset was sold during the reporting period and is included only because it generated income, the value should be "None." | Indicate value of asset at close of the reporting period, if you use a valuation method other than fair market value, please specify the method used: | • | 1 |
| | - | - | | | | ┢┈ | T | × | \$50,001-\$1 | 00,000 | | | | | m | | 96 2 | during come | than f | ~ | |
| | | | | | | | | | \$100,001-\$ | 250,000 | | | | | 71 | 1 | by you | 7 6 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 | air ma | Value of Asset | 쪮 |
| | | | | | | × | | | \$250,001-\$ | 500,000 | | | | | o | 1 | ır spo | eporti | or the | of A | BLOCK B |
| | | | | | | | | | \$500,001-\$ | 1,000,000 | | | | | x |] | rise of | | repo | sset | 1 |
| | | | | | | | | | \$1,000,001 | \$5,000,000 | | | | | _ |] | depe | P od | pleas | | 1 |
| | | | | | | | | | \$5,000,001 | \$25,000,000 | | | | | ٠ | | ndeni | one a | e spe | | 1 |
| | | | | | | | | | \$25,000,001 | 1-\$50,000,000 | | | | | ~ | | 랿 | ž. | city # > | | 1 |
| | | | | | <u> </u> | | | | Over \$50,00 | 00,000 | | | | | |] | 3 | pep | em er | | 1 |
| | | | | | | | | | Spouse/DC | Assel over \$1,0 | 00,000* | | | | × | | ğ | જ | Se a | | ╝ |
| | | | | | | | | | NONE | | | | | | | | if the a | column. | Chec gene | | 7 |
| | | | | Ĺ | | | | × | DIVIDENDS | | | | | | | _ | - 35 Se | | accou | | ı |
| | | | | | <u> </u> | | | | RENT | | | | | | | | ž gen | Divid | Check all columns that apply. generate tax-deferred income (su 529 accounts) you may check | | ı |
| | | | | L . | ļ | | <u> </u> | | INTEREST | . <u>.</u> | | | | | | | erate | 3 8 3 | | Ϋ́ | ı |
| | | | | _ | | | | | CAPITAL G | AINS | | | | | | 1 | 8 | | The the | Type of Income | Ę. |
| | | | | | | | | | | BLIND TRUST | | | | | | | 769 FE 650 | | 2 (ST | HC(| BLOCK C |
| < | | 7 | 1 | 7 | | | | | TAX-DEFER | RED | | | | | | | if the asset generated no income during period. | column. Dividends, interest, and even if reinvested, must be disclose for assets held in taxable accounts. | Check all columns that apply. For generate tax-deferred income (such as 529 accounts) you may check the | e mo | ı |
| | | | | | | Parinership income | Royaties | | Other Type ((Specify: e.g | of Income Partnership in | come or Far | m income) | | | | | the reporting | capital gains, ed as income | accounts that 401(k), IRA, or | | |
| 5 | ړ | 7 | Z | 1 | | | | | None | | | | | | | in § | generated. | Dividends, interest, must be disclosed accounts. | Thay o | | 1 |
| | | | | | | | | | \$1-\$200 | | | | | | | § € | | | THOCK Steets | | ı |
| \Box | | | | - 4 | | | | | \$201-\$1,000 | | | - | | | = | ŭ Nav | = 5 5 : | | a or w | | ı |
| _ | | | | | | | | × | \$1,001-\$2,50 | | | | | | ₹ | e no i | 25.5 | terest, | None y | ۶ | |
| \dashv | | | | | | | \dashv | _ | \$2,501-\$5,00 | | | | | | < | in which you have no interest. | <u>*</u> | and capital gal as income for | For assets for which you checked "Tax-Deferred" in Block C. may check the "None" column. For all other assets indicate | Amount of Income | |
| _ | _ | | | | | | | _ | \$5,001-\$15,0 | | | | | | | | | ome ome | n ked | 호 | BLOCK D |
| _ | \dashv | | | | | | | | \$15,001-\$50 | | | | | | | } | | oital gal | F H | ਨ | ê |
| | | | | | | ${\mathbb H}$ | | - | \$50,001-\$10 | | | | | | ≦ | | | ins, eve | Defer | emo | |
| | _ | | | | | | | | \$1,000,001-\$1, | | | | | | ▽ | | | A Page | red" ir | • | İ |
| | - | | | \dashv | | \vdash | | | Over \$5,000. | | | | | | × | | T dependent of | 3 3 8 | Bloc Bloc | | 1 |
| 1 | \dashv | \dashv | \dashv | | | | - | \dashv | | ussel with Incom | e over \$1,00 | 00,000 | | | <u>×</u> | , | generaled. Column XII is for assets held by your spouse or deceaded shift | | k C, you | | |
| \dashv | _ | | | | | | + | S(part) | P .ys | | | | | - | | | | | D = | 7 | 1 |
| ļ | | Ì | | | | | | a | s, S(part), | | | | | Ş | Leave this colublank if there and no transactions that exceeded | asset of the second | in the reporting period. | purchases (P), sales (S), or exchanges (E) | Indicate if the asset had | ans: | OCK F |
| | | | | | | | | |) 11 | | | | | | Leave this column blank if there are no transactions that exceeded | If only a portion of an asset was sold please indicate as follows: (S (part)). | in the reporting period. | ín°Ç | - इं | Transaction | χ N |
| | | | | | | | | i_ | e m | | | | | | # ₹ | ※ 説 足 ō | ٤ | <u> </u> | | š | ⅃ |

| 1 | | |
|---|------------------------|--|
| | Name: Gay James Palmer | |
| | | |

Page 6 of 21

| | ∇ | Ń | Ş. | P | 'nį | įχ | Ϋ́ | , J Z | र्य | آلا | ħ, | ΙŞ | ΥŽ | ΥĆ | A | , V | 525 | 3 | |
|---|----------|-------------------------|----------|----------|--------------|----------|--------------------|-------------------|--|---------------------|--------------|-------------------|--------------|----------|---------------------|------------------------|---------------|---|-----------------------------|
| S | それなどが | LAT Adv Pro La G. G. B. | Adv bone | | an Net R | | Novem C161 Infra A | MFS Intl Growth A | Legg Mrs BW Ab Rt Cop ? | JP Street Inc Opp # | JP Val Ady A | JP More Int Wal # | THEM MKts A | FI | GS /eca/EM WHY Debt | Earlay Vages Glb/ Mack | ASSET NAME ES | | Asset and/or Income Source |
| | ┝ | | | - | _ | | | | | | | | | | | | 71 | None > | |
| | | | | \vdash | ┢┈ | - | T | | | | | - | | | | | | \$1-\$1,000 œ | |
| | - | 1 | | ļ | , | < | 7 | 7 | c | 7 | | | | \ \ | \ \ \ | † † | - | \$1,001-\$15,000 | |
| | \Box | 7 | 5 | 7 | 1 | | | 1 | 1 | | . | 7 | ζ- | ' \ Í | | < 1 | ! | \$15,001-\$50,000 | |
| | <u> </u> | | 1 | 17 | <u> </u> | ├ | - | ļ | \vdash | | | 7 | \ | - | \vdash | | | \$50,001-\$100,000 m | _ |
| | \vdash | | - | ┝ | | - | \vdash | | | ├ | | | | - | - | | | \$100,001-\$250,000 | BLOCK B |
| | | | _ | - | | \vdash | - | - | ├- | | - | | \vdash | | - | - | | \$250,001-\$500,000 C | BLOCK B |
| | | | | - | - | - | ┝ | ┝ | | - | | | ļ | | - | | | \$500,001-\$1,000,000 ± | Ass X |
| | | | | - | - | - | \vdash | | | - | | | | | | - | | \$1,000,001-\$5,000,000 | 9 . |
| | | | | - | | ┢ | ┢╌ | - | ├ | - | | | | | | | | \$5,000,001-\$25,000,000 | |
| | | | | - | | - | | \vdash | | | _ | | - | | | | | \$25,000,001-\$50,000,000 | |
| | | - | | - | ļ | \vdash | - | - | | | | | | | | | | Over \$50,000,000 | |
| | | | | | _ | - | | | | | | | | | - | | | Spouse/DC Asset over \$1,000,000* | |
| | | | | | | | | | | | | | | _ | | | | NONE | |
| | | | | - | | | | | | | | | | | | | | DIVIDENDS | |
| | | | | | | | | | | | | | | | | | , | RENT | |
| | | | | | | | | | | | | | | | | | | INTEREST | ₹ |
| ŀ | | | | | | | | | | | | | | | | | | CAPITAL GAINS | BLOCK C |
| | | | | | | | | | | | | | | | | | | EXCEPTED/BLIND TRUST | i S |
| | 7 | , | 7 | 7 | 7 | , | 7 | • | 7 | 5 | 、 | • | • | , | ۲ | ς | | TAX-DEFERRED | BLOCK C Type of Income |
| | | , | ' | | ` | | , | | | , | ` | | | | | | | Other Type of Income (Specify: e.g., Parinership Income or Farm Income) | _ |
| [| 7 | • | <u> </u> | 7 | 7 | 1 | 7 | • | 7 | 7 | 7 | 2 | ? | • | • | <u>`</u> | | None _ | - |
| | | <u>\</u> |] | | | | | | | | | | | _ | | | | \$1-\$200 = | |
| | | | | | | | | | | | | _ | | | | | | \$201-\$1,000 = | |
| į | | | | | | | | | | | | | | | | | | \$1,991-\$2,500 < | ≥ |
| ı | | | \Box | | | | | | | | | | | | | | | \$2,501-\$5,000 < | nou B |
| | \perp | | | | | | | | | | | | | | | | | \$5,001-\$15,000 ≤ | BLOCK D |
| | _ | | | _ | | | | | | _ | | _ | | _ | _[| | | \$15,001-\$50,000 <u>\$</u> | f X |
| | | \downarrow | | | | _ | _ | | | | | _ | | _ | | | | \$50,001-\$100,000 🛓 | BLOCK D Amount of Income |
| 1 | _ | _ | | _ | | | _ | [| | | _ | \dashv | 4 | _ | | _ | | \$100,001-\$1,000,000 | |
| ļ | _ | 4 | _ | _ | | | | _ | _ | _ | _ | 4 | | \dashv | | _ | | \$1,000,001-\$5,000,000 | |
| ļ | 4 | 4 | _ | | _ | | | _ | _ | | _ | - | _ | _ | | \dashv | | Over \$5,000,000 🔀 | |
| ŀ | 4 | 4 | _ | _ | | | _ | | | _ | + | + | | | _ | | | Spouse/DC Asset with income over \$1,000,000' | |
| | | | | | | | | | | | | | | | | | | 95 95 95 95 95 95 95 95 95 95 95 95 95 9 | BLOCK E Transaction |

| Г | Τ | T | Τ | | | Ţ | T | | T | T | | | Γ | T | T | K | ź | <u> </u> | ₽,8 | | |
|----------|--------------|--|--------------|--------------|---|--------------|-----------|-------------------------|----------|--------------|--------------|----------|----------|--------------|------------|----------------|----------------------------|----------|--------------------|--|--|
| | | | | | | | | | | | | | | | | 1 4 | Tsheres use Volatility Ct. | | ARAN TESSA | | Asset and/or Income Source |
| 1 | + | + | ╁ | 1 | | 1- | \dagger | t | 十 | 十 | | | - | \vdash | ╫ | ` | | _ | Œ. | | |
| | T | +- | Ť | 7 | | | T | | Ť | T | | | | | | | | T | | None > | |
| \vdash | + | + | ╁ | \dashv | | + | † | | + | + | | • • • | - | H | † | T | | t | | \$1-\$1,000 | |
| ⊢ | + | - - | ╀ | - | | - | ╀ | +- | + | + | - | | ├ | - | ╁ | - | 5 | ╂╌ | | \$1,001-\$15,000 | |
| L | _ | \downarrow | _ | 4 | _ | ╀ | \bot | - | \perp | 4 | | | | 1 | lacksquare | \triangle | \ | ╄ | _ | | |
| L | ↓ | ╀- | \perp | \dashv | | ـــ | ╀- | _ | \bot | 4 | | | | ╀ | ┞- | <u> </u> | ļ | ╀ | \dashv | \$15,001-\$50,000 p | _ |
| <u> </u> | <u> </u> | - | \downarrow | 4 | | | ╁ | \perp | \bot | + | - | | _ | - | \vdash | | ļ | ╀ | - | Aug. 244 247 244 | Value of Asset |
| L | ↓ | 4_ | ╀ | 4 | | \vdash | ╀ | +- | \perp | 4 | | | _ | - | ـ | - | | ┞ | | \$100,001-\$250,000 | lue of Ass |
| <u> </u> | _ | - | 1 | _ | | | ↓ | _ | _ | 4 | _ | | _ | $oxed{\bot}$ | _ | _ | _ | ╀ | | \$250,001-\$500,000 | 7 ≥ 5 B |
| L | ļ | \perp | 1 | _ | | ļ | ↓_ | $oldsymbol{\downarrow}$ | \bot | _ | _ | | <u> </u> | <u> </u> | L | ļ | | ┞ | _ | \$500,001-\$1,000,000 ± | set |
| L | | 1_ | 1 | | | ļ | ┸ | 1 | ╀ | \downarrow | 4 | | _ | _ | ļ. | _ | ļ | L | _ | \$1,000,001-\$5,000,000 | |
| ┖ | | | \perp | _ | | <u> </u> | \perp | _ | 丄 | ┵ | _ | | | | _ | _ | ļ | | | \$5,000,001-\$25,000,000 | |
| L | | | | | | _ | | \perp | | \perp | \dashv | | L. | | | | | L | _ | \$25,000,001-\$50,000,000 | |
| | | \perp | 1 | _ | | L | L | ┸ | _ | | _ | | L. | <u> </u> | | | | | | Over \$50,000,000 | |
| | L | | | | | | <u> </u> | Ļ | Ц. | | | | | | | | | L | _ | Spouse/DC Asset over \$1,000,000* | |
| <u> </u> | | \perp | | 1 | | <u> </u> | | \perp | 4 | \perp | _ | | | ļ_ | | | _ | | 4 | NONE | |
| <u> </u> | \perp | $oldsymbol{\perp}$ | ┸ | 1 | | | _ | _ | ┵ | 4 | 4 | | | L. | L | Ļ | | L | 4 | DAVIDENDS | |
| | ļ | <u> </u> | ╀ | 4 | | | | ↓_ | ┸ | _ | 4 | | <u>.</u> | <u> </u> | _ | | | <u> </u> | _ | RENT | _ |
| | | ↓ | | _ | | | | $oldsymbol{\perp}$ | \perp | | \perp | | | | _ | | | L | | INTEREST | Ţ, |
| | ļ | $oldsymbol{ol}}}}}}}}}}}}}}$ | L | | | | L | \perp | \perp | | _ | | | | L | _ | | L | | CAPITAL GAINS | 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 |
| | | | | \downarrow | | | | | | 1 | \downarrow | | | L_ | | | | L | _ | EXCEPTED/BLIND TRUST | BLOCK C |
| ļ | | İ | | | | | ĺ | 1 | | | | | : | | | 7 | < | | | TAX-DEFERRED | ome (|
| | | | | | | | | | | | | | | | | | - | | | Other Type of Income (Specify: e.g., Partnership Income or Farm Income) | |
| _ | ├- | - | + | + | | _ | + | + | + | + | + | - | | | - | _ | | \vdash | ┽ | None | |
| | | ┼ | + | + | | | - | + | + | + | + | | | | | 7 | | | \dashv | P4 P000 | |
| \vdash | - | - | + | + | | _ | | \vdash | + | + | + | { | | | \vdash | | | \vdash | - | \$201-\$1,000 # | |
| | 1 | ┼- | ├- | + | | ļ | | ┼┈ | | ╀ | + | | | <u>.</u> | _ | | | - | \dashv | | |
| | | ╁ | ╁┈ | 4 | | ļ | _ | ╀ | ╀ | +- | + | | | | - | | | ⊢ | + | | A |
| | | ┼ | ╁ | + | | | | - | ╁ | + | \dashv | \dashv | | — | - | | | - | + | | oun B |
| | _ | ╁ | ╀ | 4 | | | _ | - | ╁ | + | + | \dashv | | | | | | L | 4 | | BLOCK D |
| | | - | ┞ | + | | | | ╀ | + | - | + | | | | | | | | 4 | - | <u> </u> |
| | | \vdash | \vdash | + | _ | | _ | _ | + | + | + | | | | Щ | | | _ | - | \$50,001-\$100,000 ≦ | BLOCK D Amount of Income |
| _ | _ | - | ├ | + | _ | | | - | +- | + | + | - | _ | | | | | _ | + | \$100,001-\$1,000,000 | • |
| - | | | ├- | + | | | | _ | + | + | + | \dashv | | | — , | _ | _ | _ | + | \$1,000,001-\$5,000,000 × Over \$5,000,000 × | |
| | | _ | \vdash | + | | | | \vdash | \vdash | + | + | \dashv | _ | | | | | L | + | | |
| | | | | \downarrow | _ | | | - | _ | + | + | \dashv | | _ | | | _ | | ٠, | | |
| | | | | | | | | | | | | | | | | | | | , a, a(part), or E | | BLOCK E Transaction |

almer

Page

of 21

| IS & "UNEARNED INCOME" |
|---------------------------|
| Name 7- 1/1 Stumes Palmer |
| Page 8 of 21 |

| St Col Contraciona Core # | & C/ Stret Income A | St Bletrak Street Inc up A | 90 Blockrock Glb1 Allie In | se Allianzai Conv. CLA | 50 Ameriprize | ABC Hedge Fund X | Examples: | SP Mega Corp. Slock E# | in all interest-bearing accounts. If the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts. For rental and other real property held for investment, provide a complete address or description, e.g., "rental property," and a city and state. For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a federal interest in, or income derived from, a federal interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan. If you have a privately-traded from a federal recome source is that of your spouse (SP) or dependent cridid (CC), or jointly held with anyone (JT), in the optional column on the far left. For a detailed discussion of Schedule A requirements, please refer to the instruction booklet. | For bank and other cash accounts, total the amount | income during the year. Provide complete names of stocks and mutual funds. (do not use only ticker symbols). For all RAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in the account that exceeds the recording thresholds. | Identify (a) each asset held for investment or production of income and with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or source of | Asset and/or Income Source | BLOCK A |
|---------------------------------------|---------------------------------------|----------------------------|----------------------------|------------------------|---------------|-----------------------|------------|------------------------|---|--|---|---|----------------------------|---------|
| | | | < | < | | × | Indefinite | × | None \$1-\$1,000 \$1,001-\$15,000 \$15,001-\$50,000 \$50,001-\$100,000 \$100,001-\$250,000 \$250,001-\$1,000,000 \$1,000,001-\$5,000,000 \$5,000,001-\$25,000,000 \$25,000,001-\$25,000,000 \$5,000,001-\$25,000,000 \$5,000,001-\$25,000,000 \$5,000,001-\$25,000,000 \$5,000,001-\$25,000,000 \$5,000,001-\$25,000,000 | A B C D E F G H I J K L M | because it generated income, the value should be "None." "Column M is for assets held by your spouse or dependent child in which you have no interest. | Indicate value of asset at close of the reporting penod. If you use a valuation method other than fair market value, please specify the method used. If an asset was sold during the reporting period and is included only | Value of Asset | BLOCK B |
| | , | \ | < 5 | \ \ \ - | | Partnership income | Royalties | × | NONE DIVIDENDS RENT INTEREST CAPITAL GAINS EXCEPTED/BLIND TRUST TAX-DEFERRED Other Type of Income (Specify: e.g., Partnership Income or Farm Income) | | even it reinvested, must be disclosed as income for assets thed in taxable accounts. Check 'None' if the asset generated no income during the reporting period. | Check all columns that apply. If generate tax-deferred income (such 529 accounts), you may check the column. Dividends, interest, and | Type of incor | BLOCK C |
| \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ | \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ | \ | <u> </u> | | | | | × | None \$1-\$200 \$201-\$1,000 \$1,001-\$2,500 \$2,501-\$5,000 \$5,001-\$15,000 \$15,001-\$5,0000 \$100,001-\$1,000,000 \$1,000,001-\$5,000,000 Over \$5,000,000 Spouse/DC Asset with Income over \$1,000,000* | IX X X XI III V V V III II II I | w must be disclosed as income for assets need in taxable of accounts. Check "None" if no income was earned or to generaled. "Column XII is for assets held by your spouse or dependent child in which you have no interest. | For assets for which y may check the "None category of income Dividends, interest, | | BLOCK D |
| | | | | | | | | S(part) | \$1,000. \$1,000. \$1,000. \$1,000. | Leave this column | exceeding \$1,000 in the reporting period. If only a portion of an asset was sold, please indicate as follows: (S (part)). | Indicate if the asset had purchases (P). sales (S), or | Transaction | BLOCK E |

| Ž | 173 | 1 | | 1 | 1 | - | _ | _ | , X | N. | 2 | | 8 | £ 5 | | L C S | | | | SC |
|--------------|-----------------------|--------------|--------------------|--|-------------------|--------------------|----------------|------------------------|--|--------------|-------------------|------------|----------------------|-----------------------|-------------------------|------------|--|----------|---------------------------------------|---|
| () () | WE Adv Pra La G. G Ju | Age | Putnam Cap Spect A | tons Jat 8 | Oppenh Glb/ Opp A | Novem GIbI Infor A | ~ ` | - 17 Mas BW Ab Rt Copt | JP Street Inc op # | 1 | IP Mora Int Val # | THEM MEG A | Ivy Science & Tech A | GS local EM MX & Dobt | Earlow Veyee Glb/ Mac R | ASSET NAME | | | BLOCK A Asset and/or income Source | SCHEDULE A – ASSETS & "UNEARNED INCOME" |
| | | | | | | | | | | | | | _ | | | EIF | | | | ري ص |
| | | | | | | L | | <u> </u> | | L_ | | | L. | | <u> </u> | | None | > | l l | <u>.</u> |
| | | | | | | | | | | | | | | | | | \$1.\$1,000 | œ | | Σ |
| 1 | 7 | 7 | 7 | 5 | 5 | 7 | 1 | 7 | 1 | 5 | (| < | < | < | Z | | \$1,001-\$15,000 | C | | ΕA |
| | 1 | | _ | | ┼` | \vdash | | - | + | Ť | | Ì | Ì | | | | \$15,001-\$50,000 | • | | Ž. |
| \vdash | - | | | - | - | | | 1 | - | - | | | | | | | \$50,001-\$100,000 | m | < | Ē |
| \vdash | 1 | | | | ┼┈ | | \vdash | - | | 1 | | - | - | | | | \$100,001-\$250,000 | 71 | | = |
| \vdash | ļ. <u></u> | | - | | ┢ | | | | | \vdash | \vdash | - | - | | | | \$250,001-\$500,000 | б | BLOCK B Value of Asset | N C |
| \vdash | - | | | | + | | | | | \vdash | | ├ | - | | | | \$500,001-\$1,000,000 | <u> </u> | Ass Ass | 9 |
| \vdash | - | ┝ | <u> </u> | - | \vdash | | - | ╁ | | ┼ | | | | | | | \$1,000,001-\$5,000,000 | | ₽ | m N |
| | | | | | | - | | | | ┢╌ | | <u> </u> | - | | | | \$5,000,001-\$25,000,000 | | | 7 |
| - | | - | | | | | - | | ╁ | \vdash | - | - | - | | | | \$25,000,001-\$50,000,000 | | I | |
| - | | | | | ├ | | ┼─ | | | | | | | | | | Over \$50,000,000 | | 1 | |
| - | | | ļ | _ | ╁┈ | ├ | - | ├─ | - | | ऻ | | | | | | Spouse/DC Asset over \$1,000,000* | <u>.</u> | | |
| | | | | \ | - | - | | - | | | | | | _ | | | NONE | ╼╅ | | 7 |
| - | - | < | < | <u> </u> | \ | 5 | 5 | < | < | - | < | < | | <u> </u> | < | | DIVIDENDS | | | Name: |
| \vdash | | | - | | | | - | -7 | | | _ | | | \vdash | | | RENT | | | <u>.</u> |
| \vdash | | | | | - | | | | | - | | | | | | | INTEREST | 一 | . . | \mathcal{D} |
| \vdash | < | | < | \vdash | < | < | र | 7 | H | | | | < | | | | CAPITAL GAINS | | PE BL | 2 |
| | | | • | | - | - | Ì | | - | | | | _ | | | | EXCEPTED/BLIND TRUST | | BLOCK C | 18 |
| | | | | - | ┢ | | - | | | | | | | | | | TAX-DEFERRED | | BLOCK C | |
| | | | | | | | | | | | | | | | | | Other Type of Income (Specify: e.g., Partnership Income or Farm Income) | | ъ | ames Palmer |
| | | | | <u> </u> | | | - | | 1 | - | | | | | | | None | | | 62 |
| \vdash | ~ | 4 | | - | <u>'</u> - | - | < | | ₹ | - | | • | • | 3 | | | \$1-\$200 | | - 1 | |
| | \vdash | • | <u> </u> | | • | < | • | く | | • | <u> </u> | | _ | 2) | 7 | | \$201-\$1,000 | = | 1 | 3 |
| | | | _ | | | | | - | | - | | | | | | | \$1,001-\$2,500 | ₹ | | 2 |
| - | Н | | | | \vdash | | \vdash | - | | | | | | | | | \$2,501-\$5,000 | | ğ | 16 |
| - | | | | | _ | | - | | | | | | | | | | \$5,001-\$15,000 | ≤ | ığ B | |
| | | | | | _ | | _ | | | \vdash | | | | | | | \$15,001-\$50,000 | ≦ | BLOCK unt of I | - 1 |
| \vdash | | | | | <u> </u> | | | _ | | | | | | | | | \$50,001-\$100,000 | <u>-</u> | BLOCK D Amount of Income | ļ |
| | \vdash | | | - | | | | - | | \vdash | | _ | | | | | \$100,001-\$1,000,000 | E R | ā · | Page |
| \mathbf{H} | \vdash | | | | | | - | | | | | | | | [| - | \$1,000,001-\$5,000,000 | × | i | ١٠٠ |
| | | - | | | ļ | | _ | | | \vdash | | | | | | | Over \$5,000,000 | × | 1 | 0 |
| | | | | _ | | H | | | | | | | - | | - | | Spouse/DC Asset with Income over \$1,000,000* | × | 1 | ll. |
| | | _ | | | _ | | | | | | | | | | | | Ö | _=_L | | of 12 |
| 1 | | | | | | | | | | | | | | | . | l | <u>s</u> | | BLOCK E Transaction | 12 |
| | | | | | | | | | | | | I | İ | ļ | | ļ | S(part), or E | | BLOCK | |
| | | | ı | | Ī | 1 | | ١. | | ıl | | ľ | | | - 1 | | 0 | | ō′ m | |

| Note 1,000 | | T | 1 | | | | <u> </u> | | | | | | Ų. | <u>`</u> | 585 | | | | ý |
|--|--|---------|----------|-----------|----------|--------------|----------|---------|-----------|--------------|---------|--|------------|----------------|-------------|---|---------|--|---------------------|
| S.5,000.000 S.2,000.000 X S.2,000.000 | | | | | | | | | | | | | Truck Care | Voletilite | TNAME | | | BLOCK A Asset and/or Income Source | SCHEDULE A - ASSETS |
| S.5,000.000 S.2,000.000 X S.2,000.000 | | + | +- | + | | | | _ | \dagger | | | + | T | | | None | > | | 8 |
| S5,000,000 435,000,000 | | _ | | + | | ╁ | + | | + | + | + | +- | + | - | | \$1-\$1,000 | | | <u> </u> |
| \$5,000,001-850,000,000 | | | | + | | \perp | | | _ | \dashv | | | - | <u></u> | | \$1,001-\$15,000 | | | Ţ Z |
| S5,000,001-850,000,000 | | \perp | _ | 1 | | | _ | _ | 1 | | | _ | \bot | 17 | | | | | Ž |
| S5,000,001-850,000,000 | | | - | \bot | - | <u> </u> | | _ | | | | _ | 1 | - | | <u> </u> | | | 2 |
| S5,000,001-850,000,000 | | | - | + | - | + | + | + | + | \dashv | + | | +- | ├- | <u> </u> | | | Val. B | Ë |
| S5,000,001-359,000,000 X S25,000,000 X | | - | _ | \bot | - | + | + | + | + | _ | _ | + | + | - | | · · · · · · · · · · · · · · · · · · · | | <u>, </u> | Ž |
| S5,000,001 450,000,000 | ++ | _ | | + | - | + | + | + | + | \downarrow | - | + | - | | <u> </u> | | | A K | C |
| S5,000,001 450,000,000 | | | | \bot | - | \perp | + | _ | 4 | _ | \perp | \perp | ļ | <u> </u> | | | | set | 3 |
| S20,000,001-590,000,000 X | \perp | - | _ | _ | _ | | - | \bot | 4 | _ | | - | - | ļ | | | | | "; |
| None Societion | <u> </u> | | 4 | _ | | ╁. | 4 | | _ | _ | | | - | _ | | | _ | | |
| NONE | $\perp \perp$ | | _ | 1 | | | \bot | \bot | \perp | 4 | _ | \bot | 1 | | | | ~ | | |
| NONE | 1 | | _ | \perp | _ | lacksquare | \bot | \bot | _ | 4 | \perp | \bot | | <u> </u> | | | | | |
| DIVIDENDS RENT | | | 4 | ╀ | | 1 | + | _ | _ | _ | _ | + | | _ | | | ĸ | | |
| NTEREST | | _ | ╀- | 1 | | ↓_ | \bot | \perp | 1 | | _ | \perp | _ | | | | | | Z. |
| NTEREST | 4-4- | | \bot | <u> </u> | _ | <u> </u> | 1 | | _ | \perp | \perp | | 5 | 7 | | | | i | me: |
| Other Type of Income (Specify a.g., Partnership Income or Farm Income) | _ | | 4 | ╀ | | ļ | | 4 | _ | 4 | + | \bot | ļ | | | | | | 10 |
| Other Type of Income (Specify e.g., Partnership Income or Farm Income) | | _ | _ | ┸ | _ | _ | ļ | | 4 | _ | \perp | ┿ | ļ | | | | | Ура | |
| Other Type of Income (Specify e.g., Partnership Income or Farm Income) | | | _ | \perp | | ↓ | | \perp | 4 | _ | _ | + | 5 | | | | | 약 | 42 |
| Other Type of Income (Specify a.g., Partnership Income or Farm Income) | | | <u> </u> | \perp | <u> </u> | ļ | | \perp | _ | _ | | ↓ | - | | _ | | | K C | |
| \$1,001-\$2,500 \$2,501-\$5,000 \$2,501-\$5,000 \$35,001-\$15,000 \$35,001-\$15,000,000 \$35,001-\$100,000 \$35,001-\$100,000 \$35,001-\$100,000 \$35,001-\$1,000,000 \$35,001-\$5,001-\$5,001-\$ | | | | | | i | | | | | | | | | | TAX-DEFERRED | ı | me | 8 |
| \$1,001-\$2,500 \$2,501-\$5,000 \$2,501-\$5,000 \$35,001-\$15,000 \$35,001-\$15,000 \$35,001-\$100,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$5,001-\$5,001-\$ | | | | | | | | | | | | | | | | ** | | | ma / |
| \$1,001-\$2,500 \$2,501-\$5,000 \$2,501-\$5,000 \$35,001-\$15,000 \$35,001-\$15,000 \$35,001-\$100,000 \$35,001-\$100,000 \$35,001-\$100,000 \$35,001-\$1,000,000 \$35,001-\$5,001-\$5,00 | +-+- | + | +- | T | | | † | +- | \top | \dagger | | \top | | | | None | - | | 2 |
| \$1,001-\$2,500 \$2,501-\$5,000 \$2,501-\$5,000 \$35,001-\$15,000 \$35,001-\$15,000 \$35,001-\$100,000 \$35,001-\$100,000 \$35,001-\$100,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$5,001-\$5,00 | 11 | | \top | 1 | \top | | 1 | | \top | \top | \top | | | < | | \$1-\$200 | = | | |
| \$1,001-\$2,500 \$2,501-\$5,000 \$2 \$35,001-\$15,000 \$35,001-\$15,000,000 \$35,001-\$100,000 \$35,001-\$100,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1,000,000 \$35,001-\$1, | + + | _ | 1 | \dagger | \top | | 1 | + | \top | 1 | + | 1 | 5 | | | \$201-\$1,000 | | ļ | 12 |
| \$1,000,001-\$5,000,000 × Over \$5,000,000 × Spouse/DC Assel with Income over \$1,000,000* | + | | † | † | 1 | T | 1 | \top | \top | 1 | 1 | † | | | - | \$1,001-\$2,500 | ₹ | | |
| \$1,000,001-\$5,000,000 × Over \$5,000,000 × Spouse/DC Assel with Income over \$1,000,000* | +-+- | | \top | T | \top | T | \top | \top | \top | \top | _ | 1 | | | | \$2,501-\$5,000 | < | § | |
| \$1,000,001-\$5,000,000 × Cver \$5,000,000 × Spouse/DC Assel with Income over \$1,000,000' × 70 71 72 73 74 75 75 75 75 75 75 75 75 75 | | | 1 | 1 | | | 1 | \top | 1 | | \top | \top | | | | \$5,001-\$15,000 | ≤ | at B | |
| \$1,000,001-\$5,000,000 × Over \$5,000,000 × Spouse/DC Assel with Income over \$1,000,000* | † † | | 1 | 1 | | | | \top | \top | + | 1 | 1 | | | | \$15,001-\$50,000 | ≦ | 을 위 | 1 |
| \$1,000,001-\$5,000,000 × Over \$5,000,000 × Spouse/DC Assel with Income over \$1,000,000* | † † | 7 | + | T | | | | \top | \dagger | | \top | | | | | \$50,001-\$100,000 | _ | ត្ត 🗖 | |
| \$1,000,001-\$5,000,000 | 1 | | 1 | 1 | _ | | 1 | 1 | + | + | + | T | | | | \$100,001-\$1,000,000 | | 2 | ag |
| Spouse/DC Assel with Income over \$1,000,000' | 1 | | | † | 1 | \vdash | \top | 1 | + | \top | \top | | † | | | \$1,000,001-\$5,000,000 | × | | 11 |
| | 1 | | 1 | T | | Г | † | + | + | \top | \top | † | | | | Over \$5,000,000 | × | | ō |
| 7 m 8 | 1-1- | | 1 | T | | | 1 | 1 | | | \top | 1 | | | | Spouse/DC Asset with Income over \$1,000,000* | ¥ | | ြဲ့ |
| · · · · · · · · · · · · · · · · · · · | | | | | | | | | | | | | | | | Ø | <u></u> | BLOCK E Transaction | |

| | & "UNEARNED INCOME" |
|------|-------------------------|
|] .1 | Name 7 Ary JUMES Palmer |
| | Page 11 of 21 |

| IT Col Contrarian Core to. | I col Strat Income A . | M. Blanck Strat Inc Opp A. | J Blackrock GILI Alles In | or Allianzai Conv. CLA. | IT Ameriprize | ABC Hedge Fund X | Examples: | SP Mega Corp. Slock EIF | If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC), or jointly held with anyone (JT), in the optional column on the far left. For a detailed discussion of Schedule A requirements, please refer to the instruction booklet. | If you have a privately-traded fund that is an Excepted investment Fund, please check the 'EIF' box. | Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan. | For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. | For rental and other real property held for investment, provide a complete address or description, e.g., "rental property," and a city and state. | For bank and other cash accounts, total the amount in all interest-bearing accounts. If the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts. | For all IRAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in the account that exceeds the reporting thresholds. | production of income and with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or source of income that generated more than \$200 in "unearned" income during the year. Provide complete names of stocks and mutual funds (do not use only ticker symbols). | identify (a) each asset held for investment or | Asset and/or Income Source | BLOCK A |
|----------------------------|------------------------|----------------------------|---------------------------|-------------------------|---------------|-----------------------|------------|-------------------------|--|--|---|---|---|--|--|---|--|----------------------------|---------|
| | 7 | ` | V | < | | × | Indefinite | * | None \$1-\$1,000 \$1,001-\$15,000 \$16,001-\$50,000 \$50,001-\$50,000 \$250,001-\$500,000 \$500,001-\$5,000,000 \$5,000,001-\$5,000,000 \$5,000,001-\$5,000,000 \$5,000,001-\$5,000,000 \$5,000,001-\$5,000,000 \$5,000,001-\$5,000,000 Spouse/DC Asset over \$ | | | | | > 00 C C C C C C C C C C C C C C C C C C | | valuation method other than fair market value, please specify the method used. If an asset was sold during the reporting period and is included only because it generated income, the value should be "None." *Column M is for assets held by your spouse or dependent child in which you have no interest. | Indicate value of asset at close of the reporting period. If you use a | Value of Asset | вгоск в |
| \ \ \ \ | 7 | 7 | 7 | | | Parthership Income | Royalties | × | NONE DIVIDENDS RENT INTEREST CAPITAL GAINS EXCEPTED/BLIND TRU TAX-DEFERRED Other Type of Income (Specify: e.g., Partnersh) | | Farm Income) | _ | | | | generate tax-deterred income (such as 401(k), IrA, or 529 accounts), you may check the "Tax-Deferred" column. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check "None" if the asset generated no income during the reporting period. | Check all columns that apply. For accounts that | Type of Income | BLOCK C |
| | | \ | \ | <u> </u> | | | | × | None \$1-\$200 \$201-\$1,000 \$1,001-\$2,500 \$2,501-\$5,000 \$5,001-\$15,000 \$15,001-\$50,000 \$100,001-\$100,000 \$100,001-\$5,000,000 Over \$5,000,000 Spouse/DC Asset with In | come over \$1 | 1.000,000* | | | | in which you have no interest. | may check the "None column. For all other assets inducate the category of income by checking the appropriate box below. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check "None" if no income was earned or generated. "Column XII is for assets held by your spouse or dependent child | For assets for which you checked "Tax-Deferred" in Block C, you | Amount of Income | BLOCK D |
| | | | | | | | | S(part) | P, S, S(parl), or E | | | | | Leave this column , blank if there are no transactions that exceeded \$1,000. | an asset was sold, please indicate as follows: (S (part)). | asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in the reporting period. | Indicate if the | Transaction | BLOCK E |

| | | ۲. | , | < | Ø | 1 | _ | L | C | S | C | | C | < | K | 5 R 8 | | |
|----------|-------------------|---------|----------|--------------|--------------|-------------------|--|-------------|-------------------|-----------------|-----------------|--|---------------------|-------------------|---------------------|---------|--|------------------------|
| ack 3 | That Alv Pon La C | A | 9 | \$ \$ | \sim | Muyeen G/b/ Infra | MFS Intl Growth | | TIP Street Inc Op | 11 JP Val Ady A | I JP Mora Int 1 | u ` | 11 Ivy Science & To | 1 GS local EM WHY | 1 Earton Vance Glb/ | ASSET N | | Asset and/or Income |
| | G. 6. 34 | Gre 8.2 | Speech A | Nat Res A | P P | A and | F- | 70.7 | Ope # | | Val A | P | Tech A | × 26+1 | Gb/ Mac R. | 딲 | | Source |
| | | | | | - | | | | _ | | | | ╁ | | - | | None 3> | |
| ┠─┤ | ' | | | - | \vdash | - | _ | | ├- | | | | | ┼┈ | | | \$1-\$1,000 ₂₀ | |
| | • | | _ | • | <u>_</u> | _ | _ | _ | - - | _ | _ | _ | 7 | | < | | \$1.001.\$15.000 | |
| 7 | \ | 7 | 7 | 7 | 2 | 7 | 1 | | 1 | 5 | 7 | 5 | | | | - | 7 | |
| | | | | | ļ | | ļ | ļ | <u> </u> | | | L. | ļ | | <u> </u> | | \$15,001-\$50,000 | |
| | | | | | <u> </u> | ļ | ļ | | <u> </u> | | | ļ | | ļ | _ | | \$50,001-\$100,000 m | <u>≥</u> |
| | | | | | L | <u> </u> | | | <u>L</u> . | | | | | <u> </u> | | | \$100.001-\$250,000 ¬¬ | Value of Asset |
| | | | | | | | | <u> </u> | <u>L</u> _ | | | | | <u> </u> | | | \$250,001-\$500,000 s | ¥ ? |
| | | L | | L | | | | | <u> </u> | | | | _ | | | | \$500,001-\$1,000,000 <u> </u> | Set |
| | | | | <u>L</u> . | _ | | | ļ <u>.</u> | | | | | | | | | \$1,000,001-\$5,000,000 | |
| | | | | | | | | | _ | | | _ | <u> </u> | | | | \$5,000,001-\$25,000,000 | |
| | | | | | L | | | | <u>L</u> | | | | | | | | \$25,000,001-\$50,000,000 | |
| | | | | | | | | | <u>L</u> _ | | | | | | | | Over \$50,000,000 — | |
| | | | | | | | l | | | | | | | | | | Spouse/DC Asset over \$1,000,000° ≤ | |
| | | | | < | | | | | | | | | | | | | NONE | |
| | | 7 | 7 | | <u> </u> | 7 | 7 | 7 | 7 | 7 | 7 | 1 | | 2 | 7 | | DIVIDENOS | |
| | | | | | | | | | | | | | | L | | | RENT | |
| | | | | | | | | | | | | | | | | | INTEREST | Typ . |
| | 7 | | 7 | | | 1 | 7 | 7 | | \ | | | < | | | | CAPITAL GAINS | be of Inco |
| | | | | | | | | | | | | | | | | | EXCEPTED/BLIND TRUST | Type of Inco |
| | | | | | | | | | | | | | | | | | TAX-DEFERRED | ome |
| | | | | | | | | | | | | | | | | | Other Type of Income (Specify: e.g., Partnership Income or Farm Income) | •• |
| | | | | < | } | 1 | | - | | | | | | + | | | None | |
| 7 | 7 | _ | 7 | | ├ | - | 2 | 7 | - | - | 7 | <u></u> | 7 | 7 | 7 | | \$1-\$200 = | |
| | $\overline{}$ | _ | _ | _ | | 7 | 1 | | \vdash | <u> </u> | \vdash | 1 | 1 | +7 | -> | | \$201-\$1,000 | |
| - | _ | | | _ | | 17 | - | | - | | | | - | | | | \$1,001-\$2,500 < | |
| | | | | <u> </u> | | | | | - | | | | | | | | \$2,501-\$5,000 < | Ā |
| \vdash | | | | | | | | - | | | | | | \vdash | - | | \$5,001-\$15,000 ≤ | Amount of Income |
| ┞─┼ | | | | _ | | | | | - | | | <u> </u> | - | | | | \$15,001-\$50,000 <u>≤</u> | unt of Inc |
| | | | | | _ | | ļ | | | | | | - | - | <u> </u> | | | ln c |
| \vdash | | | | | - | | <u> </u> | <u> </u> | <u> </u> | | | | | | | | | още |
| ┞—┆ | | | | ļ | | | <u> </u> | | <u> </u> | <u> </u> | | - | | ⊢ | | | | |
| | | | | L | | | <u> </u> | ļ | | <u> </u> | | | | | | | | |
| | _ | | | | <u> </u> | | <u> </u> | | <u> </u> | | | | | - | - | | | |
| Щ | | | | | | | _ | _ | <u> </u> | | | | | | <u> </u> | | Spouse/DC Asset with Income over \$1,000,000* | |
| | | | | | | | | | | | | | | | | | σ | Trair |
| | | | | | | | | | | | | | | | | | S(part), or E | BLOCK E Transaction |
| | | | | | 1 | l | 1 | 1 | | | | | | | | | <u>.</u> इ. | tion in |

Name July James Palmer

Page 12 of 21

| | | 5 5 58 | 6 | 7 | SC |
|--|---|--|---|--|---------------------|
| | | ASSET NAME MSC Min the etc. Technical user Volatifity etc. Wistomative heaves to etc. | | BLOCK A Asset and/or income Source | SCHEDULE A – ASSETS |
| | | | None >> | | & "UNEARNED INCOME" |
| † † † | | | \$1-\$1,000 ₀₀ | 1 | Ç |
| + + - | | | \$1,001,\$15,000 | 1 | Ē |
| - | | | \$15,001-\$50,000 | i i | Æ |
| | | | ATT 004 P (00 000 | | Z M |
| | | | \$100,001-\$250,000 m | BLOCK B Value of Asset | 0 |
| | + | | \$250,001-\$500,000 O | BLOCK B | N |
| | + | | \$500,001-\$1,000,000 ± | AS S | Ö |
| | | | \$1,000,001-\$5,000,000 | 2 | ≦ m |
| | | | \$5,000,001-\$25,000,000 | 1 | = |
| | | | \$25,000,001-\$50,000,000 ~ | 1 | |
| + + + | +++++ | | Over \$50,000,000 | 1 1 | |
| + | | | Spouse/DC Asset over \$1,000,000° ≥ | 1 | |
| | | | NONE | | - |
| | | < < | DIVIDENDS | 1 | Name: |
| | | | RENT | 1 1 | |
| - | | | INTEREST | - | k |
| - | | | CAPITAL GAINS | 9 B | ah |
| | | | EXCEPTED/BLIND TRUST | BLOCK C | 15 |
| + | + | | TAX-DEFERRED | S C | |
| | | | Other Type of Income (Specify: e.g., Partnership income or Farm Income) | me | lunes falmen |
| | | | None | | 1 |
| | | | \$1-\$200 = | 1 | 2 |
| | | | \$201-\$1,000 == | 1 | |
| + + + | + | | \$1,001-\$2,500 < | 1 . | 1 |
| - - | +++++++++++++++++++++++++++++++++++++++ | | \$2,501-\$5,000 | BLOCK D Amount of Income | 1 |
| + | | <u> </u> | \$5,001-\$15,000 << | unt BLC | |
| | | | \$15,001-\$50,000 <u>≤</u> | BLOCK D unt of Inc | ı |
| 1 | | | \$50,001-\$100,000 | nco. | - |
| | | | \$100,001-\$1,000,000 × | , a | Page |
| | | | \$1,000,001-\$5,000,000 >c | | |
| +++ | - | | Over \$5,000,000 × | 1 1 | 3 |
| + + + | | | Spouse/DC Asset with Income over \$1,000,000* | 1 1 | o <u>t</u> |
| | | | . o. | π _B | 100 |
| | | | , S(part), or E | BLOCK E | |

| SCHEDUL | Asset and | | 58.9 | 21 CHARLES | 1,4057- | -ATÉT | -ALO | | -FROJI | -FRANTI | - FRONT | | - FRANTI DC CHARLE - GOVT | -FRONTIED COMMUNICATION CHARLES SCHWAB -GOVT MONEY FUND WELLS FARGO WELLS FARGO | OC CHARLES TA | METTS WEST | DC CHARLES WELLS |
|---------------------------------------|---------------------------------------|---|----------|------------|--|--------------|---------------------|--------------------------|--------------------|----------|--------------|-------------|---------------------------------|---|---------------|---|---------------------------------|
| SCHEDULE A ASSETS & "UNEARNED INCOME" | BLOCK A Asset and/or income Source | · | | SCHWAB | MONEY FUND | TUE | -ALCATEL LUCENT ADR | -FRONTIER COMMUNICATIONS | | 2 St. A8 | Markey Finio | Preso Abyta | | ARGO | ARGO SAUM | HEALT THISO-SAUMS | ARGO A THE SAUM A DAMY AL |
| So So | | None | 4 | | T | | | | | T | | | | দ | | | |
| <u>ٿ</u> | | | | | Ļ | Ļ | <u> </u> | ļ | ↓ | \bot | 1 |] | | <u> </u> | ļ | | |
| Ž | | \$1-\$1,000 | | | | | 1 | 1 | $oldsymbol{\perp}$ | | <u>\</u> | | \ | L | | | |
| \ | | \$1'001-\$16'000 | | | l | | | | | | | < | | ^ | | | |
| 2 | | \$15,001-\$60,000 | | | < | < | | | | | | | | | | | |
| 8 | ≦ | \$60,001-\$100,000 PA | | | | | | | | | | | | | | _ | |
| Z | BLOCK B Value of Asset | \$100,001-\$250,000 | | | 上 | | <u> </u> | | _ | | | | | | <u> </u> | | |
| 8 | ¥ | \$250,001-\$500,000 | | | L | L | | 1_ | | | | \Box | | <u> </u> | _ | | |
| Ž | ğ | \$500,001-\$1,000,000 | | | L | | <u> </u> | <u> </u> | <u> </u> | | \bot | | | <u> </u> | | _ | |
| 111 | | \$1,000,001-\$5,000,010 | | | ↓ | ļ | _ | ↓_ | 4- | | _ | | | ļ | _ | _ | \perp |
| | | \$5,000,001-\$25,000,000 | | Ш | ـــ | <u> </u> | ↓ | ╙ | + | ╬ | | | <u> </u> | | | _ | _ |
| | | \$25,000,001,\$20,000,000 × | | | ┼ | <u> </u> | ↓_ | ↓_ | + | + | + | \dashv | ļ | | + | | + |
| | | | | _ | ⊢ | H | ļ | - | +- | + | | _ | | ╂ | - | | |
| | | NOVE \$ STORAGE \$ STORAGE \$ \$ | | Н | ┿ | - | _ | ╄ | +- | + | | - | - | ┾ | ┿ | | |
| Name: | • | CIMORNOS | | | ╁ | ₹ | 7 | ╁ | > | + | + | - | _ | ┼ | ┿ | _ | + |
| ĕ | | RENT | | | ╂─ | ₽ | ╂ | 1 | ╁ | + | + | \dashv | | ╁ | ļ | | |
| 0 | ار | MEREST | ł | Н | ₹ | ┢ | ╁ | ╫┈ | + | + | \dashv | | - | ₹ | | \dashv | -++ |
| 4 |) P | CAPITALGANS | | Н | ├ ` | - | ╁ | ╁ | + | - P | + | ₹ | - | + ` | - | ┪ | |
| GARY | BLOCK C | EXCEPTEDBLINGTRUST | | - | \vdash | | 1 | ╁ | 1 | ╁, | _ | | | 1 | - | + | ++ |
| K | BLOCK C Type of Income | TAX-OF-ERFED | | | 1 | | 1 | 1 | + | \top | + | 1 | | † | | 1 | |
| TAMES P | • | Other Type of Income (Specify: e.g., Partment ip Income or FarmIncome) | | | | | | | - | | | | | | | | |
| 7 | | Plane | | | | | 7 | | | ٠ | | | | | T | | |
| PALMER | | \$14300 = | | | | | | 1 | | Ĺ | <u> </u> | <u> </u> | ~ | ! | | | |
| \nearrow | | \$201-\$1,000 | | | | | | L | | | | | <u> </u> | | 1 | | |
| | ≥ . | \$1,001-\$2,500 < | | | 1 | 7 | <u> </u> | _ | \perp | 1 | 1 | | L | _ | \perp | | |
| | BLOCK D Amount of Income | \$2,501.\$6,000 < | | | 1 | L | | 1_ | | \perp | \perp | | | <u> </u> | 1 | | 4 |
| | BLOCK D | \$5,001-\$15,000 < | . | | \perp | | <u> </u> | <u>L</u> | 4_ | \bot | \bot | | | ↓ | _ | | \perp |
| | i i X | \$15,001-\$60,000 <u>\$</u> | | | $oldsymbol{ol}}}}}}}}}}}}}}}}}}$ | | | L | \perp | \bot | | | | _ | | | 4 |
| קַ | ä | \$50,001-2,000,000 ₹ | | | 1 | | <u> </u> | <u> </u> | | | | | <u> </u> | | 1_ | | |
| Page | | \$100,001-\$1,000,000 | ļ | | igspace | _ | <u> </u> | _ | \bot | 4 | \bot | | <u> </u> | | 1 | | |
| 4 | | \$1,000,001-\$5,000,000 × | - | Ш | ↓ | _ | ļ | _ | 4 | \bot | \perp | | _ | <u> </u> | <u> </u> | | |
| | | Over\$5,000,000 | | | ـــ | <u> </u> | 1 | ــــ | + | | _ | | \Box | ـ | | | |
| of 21 | | SpourseCCC Asset with Incorrectors \$1,000,000° | | | Ļ | <u> </u> | Ļ | | | | + | \Box | L | ↓ | <u> </u> | | |
| 12 | BLOCK E Transaction | P. G. (V) part), or E | | | | | | | | | | | | | | | |

SCHEDULE B - TRANSACTIONS

Name: GARY JAMES PALMER Page 15 of 21

| | | | | | | | | | - PINCO UNICONSTRAINED BO FD | JT CHARLES SCHWAD | TAIST CL | PACINERS PD | SP CHARLES SCHWAB | gp Exemple Mega-Corp. Stock | SP,DC,JT Asset | Capital Gains: if a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A. "Column K is for assets solely hald by your spouse or dependent child. | dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction. | Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your |
|---|--|----------|---|--|--|--|--|----------|------------------------------|-------------------|----------|-------------|-------------------|-----------------------------|----------------|---|--|--|
| | | | | | | | | | | | | | | | | Purchase | | Тур |
| | | | | | | | | | < | : | < | ^ | | - | | Sale | | Type of Transaction |
| | | | | | | | | | | | | | | × | | Partial Sale | | nsactio |
| | | | | | | | | | | | | | | | | Schange | | ם |
| | | | | | | | | | | | | < | | × | | Check Box if Ca Exceeded \$200 | ipital Gain | |
| | | | | | | | | | 2/4/14 | | 1/6/14 | 1/8/14 | | 3574 | | Morny, or B- vegetay, if applicable | (MODAYIR) or Calminny, | Date |
| | | | | | | | | | < | | < | < | | | | \$1,001- \$15,000 | > | |
| | | | | | | | | | | | | | | × | | \$15,001- \$50,000 | GO | |
| | | | | | | | | | | | | | | | | \$60,001- \$100,000 | c | |
| | | | | | | | | | | | | | | | | \$100,001- \$250,000 | 0 | An |
| | | | | | | | | | | | | | | | | \$250,001- \$500,000 | m | Amount of |
| | | | | | | | | | | | | ļ | | | | \$500,001- \$1,000,000 | וד | |
| | | | ļ | | | | | | | | | <u> </u> | | | | \$1,000,001- \$5,000,000 | ه | Transaction |
| | | | | | | | | | | | | | | | | \$5,000,001- \$25,000,000 | <u> </u> | Ď |
| | | <u> </u> | | | | | | <u> </u> | | | | | | | _ | \$25,000,001- \$50,000,000 | - | |
| | | | | | | | | | | | | | | | | Over \$50,000,0 | oo <u>-</u> | |
| L | | | | | | | | | | | | | | | | Over \$1,000,00 (Spouse/DC As | | |

SCHEDULE C -- EARNED INCOME

Name: GARY JAMES PALMER Page 16 of 21

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000. See examples below. **EXCLUDE**: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

| INCOME LIMITS and PROHIBITED INCOME: The 2014 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$26,955. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) were totally prohibited. | sated at or above the "senior staff" rate totally prohibited. | e was \$26,955. In addition, certain |
|--|---|--------------------------------------|
| Source (include date of receipt for honoraria) | Туре | Amount |
| Keene State | Approved Teaching Fee | \$6,000 |
| Examples: State of Maryland Civil War Roundtable (Oct. 2) | Legislative Pension Spouse Speech | \$18,000 \$1,000 |
| Onlario County Board of Education | Spouse Salary | N/A |
| ALABAMA POLICY INSTITUTE | SALARY - NOT A MEMBER. | 926,081# |
| Œ | Spouse | NA |
| | : | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

SCHEDULE D - LIABILITIES

Name: GARY JAMES PALMER Page_17

of 27

you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you rent tout or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to *Column K is for liabilities held solely by your spouse or dependent child

| | | | | | | | l | | | | | | | | ١ |
|---------------|-----------|-------------------------------|--------------------------------|--|-----------------------|-----------------------|------------------------|-------------------------|-------------------------|---------------------------|-----------------------------|------------------------------|-------------------------------|-------------------|----------------------|
| | | | | | | | | > | Amount of Liability | t of Lia | ability | | | 1 | |
| <u>-</u> | , <u></u> | | Date | | * | D | ი | D | m | יי | | I | _ | <i>د</i> | ~ |
| SP, DC, JT | | Creditor | Liability Incurred MO/YR | Type of Liability | \$10,001- \$15,000 | \$15,001- \$50,000 | \$50,001- \$100,000 | \$100,001- \$250,000 | \$250,001- \$500,000 | \$500,001- \$1,000,000 | \$1,000,001- \$5,000,000 | \$5,000,001- \$25,000,000 | \$25,000,001- \$50,000,000 | Over \$50,000,000 | C V C (\$00,000,000 |
| | Example | First Bank of Wilmington, DE | 5/98 | Mortgage on Rental Property, Dover, DE | | | | × | | | | | | | |
| | AEGIOUS. | REGIOUS BANK OF BIRMAKHAM, AL | 9/10 | Home Mariange | | | | < | | | | | | | |
| | | | | | | | | | | | | | | | 1 |
| | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | 1 |

SCHEDULE E – POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude**: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

| Position | Name of Organization |
|---------------------------|--------------------------|
| CHIEF DEVELOPMENT OFFICER | ALABAMA POLICY INSTITUTE |
| | |
| | |
| | |
| | |
| | |

SCHEDULE F - AGREEMENTS

| Name: GARY JA | _ |
|---------------|---|
| TAMES PALMER | • |
| Page 18 of 21 | |
| of 21 | • |

Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment, a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

| Date | Parties to Agreement | Terms of Agreement |
|------|----------------------|--------------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

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

Report sources of compensation received by you or your business affiliation for services provided directly by you during the current year and two prior years. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise if you directly provided the services generating a fee or payment of more than \$5,000. Exclude: Payments by the U.S. government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information listed on Schedule C.

| Satoring of the | a serif merentianen serieseen oa een aren aren aren aren aren aren aren | gerenment and any mentioned accordend as a result of a privileged relativishing to the repeat internation instead of decisions of |
|-----------------|---|---|
| | Source (Name and City/State) | Brief Description of Duties |
| Example: | Doe Jones & Smith, Hometown, Homestate | Accounting Services |
| ALABAN | ALABAMA BLICY INSTITUTE | FUNDRAISING, GRANT WRITING |
| | • | |
| | | |
| | | |
| | | |
| | | |
| | | |

SCHEDULE H – TRAVEL PAYMENTS and REIMBURSEMENTS

Name: GARY JAMES PALMER

Page 19 of 20

Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$375 received by you, your spouse, or your dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense. Disclosure is required regardless of whether the expenses were paid directly by the sponsor or were paid by you and reimbursed by the sponsor.

EXCLUDE: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to

| | | | | | | | | Examples: | | |
|---|--|--|--|--|---|--|-----|---|-----------------------------|---|
| | | | | | | | N/A | Habitat for Humanty (charty fundraiser) | Government of China (MECEA) | Source |
| | | | | | | | | Mar. 3-4 | Aug. 6-11 | Date(s) |
| | | | | | | | | DC-Boston-DC | DC-Beijing, China - DC | City of Departure – Destination — City of Return |
| • | | | | | | | | ٧ | ۲ | Lodging? (Y/N) |
| | | | | | | | | Y | ٧ | Food? (Y/N) |
| | | | | | , | | | ٧ | Z | Family Member Included? (Y/N) |

| Name: GARY JAMES PALMER |
|-----------------------------|
| Page <u>20</u> of <u>21</u> |

List the source, activity (i.e., speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of paying an honorarium to you. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Ethics. SCHEDULE I – PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA Examples: Association of American Associations, Washington, DC XYZ Magazine Source Activity Speech Article Feb, 2, 2014 Aug. 13, 2014 Date Amount \$2,000 \$500

FILER NOTES (Optional)

Name: GARY JAMES PALMER Page 21 of 21

| | | | | | | | | | NOTE NUMBER |
|--|--|---|--|--|--|---------------------------------------|---|-----|----------------|
| | | | | | | • • • • • • • • • • • • • • • • • • • | • | N/A | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | NOTES |
| | | | | | | | | | |
| | | ! | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |