



Filing ID #10015590

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Peter Welch
Status: Member
State/District: VT00

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2016
Filing Date: 05/15/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Welch Account ⇒ Abbott Laboratories (ABT)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Welch Account ⇒ American Airlines Group DESCRIPTION: Call 1.17.17 \$48		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ American Airlines Group, Inc. (AAL)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ American Century High Yield		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ American Century International Growth		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ American Century Real Estate		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ AutoDesk DESCRIPTION: 12.15.17 1.95%		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Welch Account ⇒ AutoDesk		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: 9.15.22 3.6%					
Welch Account ⇒ Banco Santander, S.A. Sponsored ADR (SAN)		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Welch Account ⇒ Bank of America		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: 11.9.20 2.151%					
Welch Account ⇒ Celgene Corporation		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: 8.15.18 2.3 %					
Welch Account ⇒ Cerner Corporation (CERN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Welch Account ⇒ Charles Schwab Government Money Fund		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ Charles Schwab Value Advantage Money Market		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ Cisco Systems, Inc. (CSCO)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ Civitas Solutions, Inc. (CIVI)		None	Capital Gains	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Consumer Discretionary Select Sector SPDR		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Consumer Discretionary Select Sector SPDR		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒ Consumer Staples Select Sector SPDR		\$1,001 - \$15,000	None		<input type="checkbox"/>
Welch Account ⇒ Consumer Staples Select Sector SPDR		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
CREF Equity Index R3					
Welch Account ⇒ CREF Global Equity R3		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ CREF Growth R3		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ CREF Money Market		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ CREF Social Choice		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ Dell Technologies Inc. Class V (DVMT)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
COMMENTS: Transferred as a result of EMC Sale					
Welch Account ⇒ EMC Corporation (EMC)		None	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Welch Account ⇒ EMC Corporation		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: 6.1.18 1.875%					
Welch Account ⇒ FedEx Corporation (FDX)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ Fidelity Capital & Income Fund		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Fidelity Cash Reserves		\$500,001 - \$1,000,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ Fidelity Contrafund		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ Fidelity Convertible Securities Fund		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Welch Account ⇒ Fidelity Floating Rate High Income Fund		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Fidelity Government Money Market		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Welch Account ⇒ Fidelity Growth		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Welch Account ⇒ Fidelity MSCI Consumer Discretionary ETF		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Fidelity Municipal Money Market		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Welch Account ⇒ Fidelity New Markets Income Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Fidelity Select IT		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Fidelity Telecom & Utilities		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Welch Account ⇒ First Solar, Inc. (FSLR)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Welch Account ⇒ First Trust Nasdaq ABA CBIF		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ General Electric Company (GE)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ General Electric Company (GE)		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒ General Electric Company (GE)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ Health Care Select Sector SPDR (XLV)		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Welch Account ⇒ Health Care Select Sector SPDR (XLV)		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒ Industrial Select Sector SPDR		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Inherited					
Welch Account ⇒ Industrial Select SPDR		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Intuit		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: 3.15.17 5.75%					
Welch Account ⇒ IQ Hedge Multi-Strategy Tracker ETF		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ iShares Brazil		None	Capital Gains	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Dow Jones Consumer Services		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒ iShares Dow Jones Transportation Average		\$100,001 - \$250,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ iShares Dow Jones US Consumer Services		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Dow Jones US Pharmaceuticals		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒ iShares Global Telecom		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ iShares MSCI Asia ex Japan		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Asia ex Japan Index		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒ iShares MSCI Emerging Markets Index		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI India		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Welch Account ⇒ iShares MSCI Japan ETF		None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Japan Index Fund (EWJ) DESCRIPTION: Call 9.23.16 \$12		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Taiwan Capped ETF DESCRIPTION: Call 9.16.16 \$15		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Taiwan Capped ETF DESCRIPTION: call 12.16.2016 \$31		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Taiwan Capped ETF DESCRIPTION: Call 9.16.16 \$15		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ iShares MSCI Taiwan Capped ETF DESCRIPTION: Call 9/16/2016 \$16		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Taiwan Index		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares S&P 500		None	Capital Gains	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares S&P US Preferred Stock Index Fund		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Taiwan		None	Capital Gains	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares U.S. Pharmaceuticals		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ iShares Utilities		None	Capital Gains	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Welch Account ⇒ JP Morgan Chase & Co. (JPM)		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Welch Account ⇒ LabCorp		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: 11.1.18 2.5%					
Welch Account ⇒ Magna International, Inc. (MGA)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Market Vectors Vietnam ETF		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Welch Account ⇒ Materials Select Sector SPDR Fund		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ Materials Select Sector SPDR Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Welch Account ⇒ Materials Select Sector SPDR Fund		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ Northern U.S. Government Select Portfolio		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ Novartis AG (NVS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ Orbotech Ltd. - Ordinary Shares (ORBK)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ PIMCO All Asset Fund Institutional Class		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ Power Shares S&P Small Cap Industrial		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Procter & Gamble Company (PG)		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Qualcomm		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: 5.20.22 3%					
Welch Account ⇒ Qualcomm		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: 5.20.25 3.45%					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Welch Account ⇒ Sirius XM Holdings Inc. (SIRI)		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Welch Account ⇒ SPDR Blackstone GSO Senior Loan ETF		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ SPDR Health Care Services (XLV)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ SPDR Select Sector Fund - Energy Select Sector		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ SPDR Select Sector Fund - Energy Select Sector DESCRIPTION: Call 5.13.16 \$64		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ SPDR Select Sector Fund - Energy Select Sector DESCRIPTION: Inherited		\$1,001 - \$15,000	None		<input type="checkbox"/>
Welch Account ⇒ SPDR Select Sector Fund - Energy Select Sector		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ SPDR Select Sector Fund - Financial		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Welch Account ⇒ SPDR Select Sector Fund - Financial DESCRIPTION: Inherited		\$1,001 - \$15,000	None		<input type="checkbox"/>
Welch Account ⇒ SPDR Select Sector Fund - Financial		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ SPDR Select Sector Fund - Utilities DESCRIPTION: Call 8.26.16 \$50.50		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Welch Account ⇒ SPDR Short Term Corporate Bond ETF		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ SPDR-Select Sector Fund-Real Estate		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
COMMENTS: Acquired as a result of a split from SPDR Select Sector Fund - Financial					
Welch Account ⇒ SPDR-Select Sector Fund-Real Estate		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒ SPDR-Select Sector Fund-Real Estate		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒ SPDR-Select Sector Fund-Real Estate		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ Stryker Corporation		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 3.8.19 2%					
Welch Account ⇒ TD Ameritrade Money Market		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ Technology Select Sector SPDR Fund		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ Technology Select Sector SPDR Fund		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Technology Select Sector SPDR Fund		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒ TIAA High Yield RTMT		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ TIAA Real Estate		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ TIAA Traditional		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Welch Account ⇒ TIAA-CREF Large Capital Value		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ TIAA-CREF Real Estate		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Welch Account ⇒ TIAA-CREF Small Cap Equity		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Welch Account ⇒ Town Farm Hill Road		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Hartland, VT, US					
Welch Account ⇒ U.S. Bancorp (USB)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ U.S. Treasury Note		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: 6.30.17 .75%					
Welch Account ⇒ U.S. Treasury Note		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: 8.15.23 2.5%					
Welch Account ⇒ Under Armour, Inc. Class C (UA)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Welch Account ⇒ Unilever NV (UN)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ United Parcel Service, Inc. (UPS)		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ University of Vermont		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: 10.1.31 3.5%					
Welch Account ⇒ Utilities Select Sector SPDR Fund		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Vanguard Dividend Appreciation		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Welch Account ⇒ Vanguard FTSE Developed Market ETF		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Welch Account ⇒ Vanguard FTSE Developed Markets ETF		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒		\$100,001 -	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard FTSE Europe		\$250,000			
Welch Account ⇒ Vanguard Long Term Corporate Bond ETF		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ Vanguard Mortgage-Business Securities ETF		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Vanguard Precious Metals Fund		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Welch Account ⇒ Vanguard Telecommunication Services ETF		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Inherited					
Welch Account ⇒ Vanguard Telecommunications Services ETF		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Welch Account ⇒ Vanguard Total Stock Market Index Fund		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ Vermont Municipal Bond Bank		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: 12.1.31 5%					
Welch Account ⇒ Wells Fargo & Company (WFC)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Welch Account ⇒ Whole Foods Market, Inc. (WFM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ Abbott Laboratories (ABT)		05/19/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ American Airlines Group, Inc. (AAL)		12/27/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Call 1.20.17 \$48					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ American Airlines Group, Inc. (AAL) DESCRIPTION: Call 8.26.16 \$34		08/26/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ American Airlines Group, Inc. (AAL) DESCRIPTION: Call 8/26/2016 \$34		08/15/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ American Airlines Group, Inc. (AAL) DESCRIPTION: Call 1.17.17 \$48		12/23/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ American Airlines Group, Inc. (AAL) DESCRIPTION: Call 8/26/16 \$34		08/16/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ AutoDesk DESCRIPTION: 12.15.22 3.6%		05/18/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ AutoDesk DESCRIPTION: 12.15.17 1.95%		05/20/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Autoliv, Inc. (ALV)		06/24/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Autoliv, Inc. (ALV)		12/19/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Banco Santander, S.A. Sponsored ADR (SAN)		12/30/2016	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Bank of America DESCRIPTION: 2.151%, due 11/9/20		11/28/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Celgene Corporation DESCRIPTION: 2.3%, due 8/15/18		12/6/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Cerner Corporation (CERN)		02/23/2016	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ Civitas Solutions, Inc. (CIVI)		03/16/2016	P	\$50,001 - \$100,000	
Welch Account ⇒ Civitas Solutions, Inc. (CIVI)		05/9/2016	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Civitas Solutions, Inc. (CIVI)		06/29/2016	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Consumer Discretionary Select Sector SPDR		10/12/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Consumer Discretionary Select Sector SPDR		12/5/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Consumer Discretionary Select Sector SPDR		12/14/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Consumer Staples Select Sector SPDR		01/19/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Consumer Staples Select Sector SPDR		04/25/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ CVS Health Corporation (CVS)		09/19/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ CVS Health Corporation (CVS)		09/26/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ DoubleLine Total Return Bond Fund Class I		02/9/2016	S	\$15,001 - \$50,000	<input type="checkbox"/>
Welch Account ⇒ EMC Corporation (EMC)		09/7/2016	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Fidelity Capital & Income Fund		12/30/2016	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Fidelity Floating Rate High Income Fund		12/23/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ Fidelity Government Money Market		12/30/2016	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ Fidelity MSCI Consumer Discretionary ETF		01/13/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Fidelity MSCI Consumer Discretionary ETF		03/30/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Fidelity MSCI Consumer Discretionary ETF		04/20/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Fidelity Municipal Money Market		12/30/2016	P	\$15,001 - \$50,000	
Welch Account ⇒ Fidelity New Markets Income Fund		12/30/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ Fidelity New Markets Income Fund		09/13/2016	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Fidelity Select IT Services		09/13/2016	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Welch Account ⇒ First Solar, Inc. (FSLR)		05/4/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ First Trust Nasdaq ABA CBIF		04/20/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ First Trust North American Energy Infrastructure ETF		04/20/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Honda Motor Company, Ltd. (HMC)		08/26/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Industrial Select Sector SPDR		11/30/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Industrial Select Sector SPDR		04/25/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Industrial Select Sector SPDR		12/14/2016	P	\$1,001 - \$15,000	
Welch Account ⇒		10/31/2016	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Intuit					
DESCRIPTION: 3.15.17 5.75%					
Welch Account ⇒ iShares 0-5 Year High Yield Corporate Bond		11/14/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares Brazil		10/17/2016	P	\$50,001 - \$100,000	
Welch Account ⇒ iShares Brazil		11/2/2016	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Currency Hedged MSCI Germany		01/8/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares Dow Jones US Consumer Services		12/9/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Asia ex Japan		01/13/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares MSCI Asia ex Japan Index		08/18/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares MSCI Emerging Index Fund		12/30/2016	P	\$15,001 - \$50,000	
Welch Account ⇒ iShares MSCI Emerging Markets		01/8/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares MSCI EMU Index Fund		08/15/2016	S	\$15,001 - \$50,000	<input type="checkbox"/>
Welch Account ⇒ iShares MSCI EMU Index Fund		01/13/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares MSCI Europe		08/15/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares MSCI Japan ETF		12/23/2016	S	\$50,001 - \$100,000	<input type="checkbox"/>
Welch Account ⇒ iShares MSCI Japan ETF		12/20/2016	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ iShares MSCI Japan Index		07/7/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares MSCI Japan Index Fund (EWJ) DESCRIPTION: Call 9.23.16 \$12		09/23/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares MSCI Japan Index Fund (EWJ) DESCRIPTION: Call 9.23.16 \$12		09/26/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Japan Index Fund		08/15/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Japan Index Fund (EWJ) DESCRIPTION: Call 1/6/17 \$49		11/28/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Japan Index Fund (EWJ) DESCRIPTION: Call 9/23/16 \$12		09/22/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Taiwan Capped ETF (EWT) DESCRIPTION: Call 9.16.16 \$15		09/19/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares MSCI Taiwan Capped ETF (EWT) DESCRIPTION: Call 9.16.16 \$15		09/16/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares MSCI Taiwan Capped ETF (EWT) DESCRIPTION: Call 10.21.2016 \$15		09/20/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares MSCI Taiwan Capped ETF (EWT) DESCRIPTION: Call 12.16.2016 \$31		11/28/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares MSCI Taiwan Capped ETF (EWT) DESCRIPTION: Call 9/16/2016 \$16		08/10/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒		11/28/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares MSCI Taiwan Capped ETF (EWT)					
DESCRIPTION: Call 12/16/16 \$431					
Welch Account ⇒ iShares MSCI Taiwan Capped ETF (EWT)		09/21/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Call 10.21.16 \$15					
Welch Account ⇒ iShares MSCI Taiwan Capped ETF (EWT)		09/20/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Call 10.21.16 \$15					
Welch Account ⇒ iShares MSCI Taiwan Capped ETF (EWT)		09/16/2016	P	\$1,001 - \$15,000	
DESCRIPTION: Call 9.16.16 \$15					
Welch Account ⇒ iShares MSCI Taiwan Capped ETF (EWT)		08/11/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Call 9.16.16 \$15					
Welch Account ⇒ iShares Nasdaq BioTech		04/20/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares S&P 500		04/25/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares S&P 500		04/28/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares S&P 500		04/28/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares S&P 500		05/3/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares S&P 500		05/11/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares S&P 500		05/16/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares S&P 500		05/17/2016	P	\$100,001 - \$250,000	
Welch Account ⇒		05/20/2016	S	\$100,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares S&P 500				\$250,000	
Welch Account ⇒ iShares S&P 500		05/31/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares S&P 500		06/3/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares S&P 500		08/17/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares S&P 500		08/22/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares S&P 500		08/25/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares S&P 500		08/30/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares S&P 500		09/9/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares S&P 500		09/14/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Taiwan		10/25/2016	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Taiwan		11/9/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares Transportation		12/23/2016	S	\$100,001 - \$250,000	<input type="checkbox"/>
Welch Account ⇒ iShares Transportation		11/15/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares Transportation		11/24/2016	S	\$100,001 - \$250,000	<input type="checkbox"/>
Welch Account ⇒ iShares Transportation		12/19/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ iShares Transportation		08/2/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares Transportation		08/11/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Transportation		11/7/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares Transportation		11/11/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Transportation		11/23/2106	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares Transportation AverageETF (IYT) DESCRIPTION: Call 12.16.2016 \$145		11/1/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares Transportation AverageETF (IYT) DESCRIPTION: Call 5/20/16 \$143		04/19/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Transportation AverageETF (IYT) DESCRIPTION: call 5/20/16 \$143		05/20/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Transportation AverageETF (IYT) DESCRIPTION: Call 11/18/16 \$146		11/1/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Transportation AverageETF (IYT) DESCRIPTION: Call 10.7.16 \$48		09/7/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Transportation AverageETF (IYT) DESCRIPTION: Call 8/19/16 \$145		07/14/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares U.S. Energy ETF (IYE) DESCRIPTION: Call 5/13/16 \$64		04/19/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒		05/17/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares U.S. Energy ETF (IYE) DESCRIPTION: call \$65.50 6/11/16					
Welch Account ⇒ iShares U.S. Energy ETF (IYE) DESCRIPTION: call 5/13/16 \$64		05/9/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares U.S. Energy ETF (IYE) DESCRIPTION: Call 8/26/16 \$68		08/26/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares U.S. Energy ETF (IYE) DESCRIPTION: Call 8/26/16 \$68		08/15/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares U.S. Energy ETF (IYE) DESCRIPTION: Call 6.30.16 \$70		06/30/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares U.S. Preferred Stock		12/22/2016	P	\$50,001 - \$100,000	
Welch Account ⇒ iShares Utilities		09/20/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares Utilities		09/23/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Utilities		09/21/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ iShares Utilities		09/27/2016	S	\$100,001 - \$250,000	<input type="checkbox"/>
Welch Account ⇒ iShares Utilities		11/8/2016	P	\$50,001 - \$100,000	
Welch Account ⇒ iShares Utilities		11/12/2016	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: call 5/20/16 \$48		04/27/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: call 5/20/2016 \$48		05/17/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: call 11/18/16 \$48		11/7/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: call 1/6/17 \$48		11/28/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: call 10/21/16 \$48		10/13/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: Call 11/4/16 \$48		10/24/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: Call 10/7/16 \$48		09/19/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: Call 8.26.16 \$50.50		08/23/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: Call 8/26/16 \$50.50		07/25/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: Call 7/22/16 \$51.50		07/22/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ iShares Utilities Bond ETF (AMPS) DESCRIPTION: Call 7/22/16 \$51.50		07/8/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ JP Morgan Chase & Co. (JPM)		11/10/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Kubota Corporation (KUBTY)		11/7/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ LabCorp		03/22/2016	P	\$1,001 - \$15,000	
DESCRIPTION: 8.23.17 2.2%					
Welch Account ⇒ Magna International, Inc. (MGA)		06/27/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Materials Select Sector SPDR Fund		01/13/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Materials Select Sector SPDR Fund		01/13/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Materials Select Sector SPDR Fund		10/12/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Materials Select Sector SPDR Fund		12/14/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ PNC Financial Services Group, Inc. (PNC)		11/9/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Power Shares S&P Small Cap Industrial		04/20/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Power Shares S&P Small Cap Information Technology		02/1/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Procter & Gamble Company (PG)		02/8/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Procter & Gamble Company (PG)		07/11/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Rite Aid Corporation (RAD)		05/17/2016	S	\$50,001 - \$100,000	<input type="checkbox"/>
Welch Account ⇒ Sanofi Ordinary Shares (SNYNF)		06/24/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Sanofi Ordinary Shares (SNYNF)		12/8/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ SPDR Blackstone GSO Senior Loan ETF		11/17/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ SPDR Health Care Services		12/22/2016	P	\$15,001 - \$50,000	
Welch Account ⇒ SPDR Health Care Services (XLV)		12/28/2016	P	\$15,001 - \$50,000	
Welch Account ⇒ SPDR Health Care Services (XLV)		04/20/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ SPDR Health Care Services (XLV)		04/4/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ SPDR Health Care Services (XLV)		04/25/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ SPDR Health Care Services (XLV)		07/12/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ SPDR S&P Capital Markets ETF		01/13/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) DESCRIPTION: 5.13.16 \$64		05/9/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) DESCRIPTION: Call 5.13.16 \$64		05/10/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ SPDR Select Sector Fund - Energy Select Sector		01/19/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ SPDR Select Sector Fund - Financial		01/19/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ SPDR Select Sector Fund - Financial		04/25/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ SPDR Select Sector Fund - Utilities (XLU) DESCRIPTION: Call 8.26.16 \$50.50		08/24/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ SPDR-Select Sector Fund-Real Estate		10/6/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Stryker Corporation DESCRIPTION: 3.8.19 2%		03/7/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Technology Select Sector SPDR Fund		02/1/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Technology Select Sector SPDR Fund		11/30/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Technology Select Sector SPDR Fund		02/4/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Technology Select Sector SPDR Fund		02/11/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Under Armour, Inc. Class C (UA)		11/29/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Unilever NV (UN)		11/10/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ United Parcel Service, Inc. (UPS)		03/17/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Utilities Select Sector SPDR		05/18/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ Utilities Select Sector SPDR		05/23/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Utilities Select Sector SPDR		05/25/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ Utilities Select Sector SPDR		05/31/2016	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Utilities Select Sector SPDR		06/16/2016	P	\$100,001 - \$250,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ Utilities Select Sector SPDR		06/21/2016	S	\$100,001 - \$250,000	<input type="checkbox"/>
Welch Account ⇒ Vanguard Dividend Appreciation		12/28/2016	P	\$50,001 - \$100,000	
Welch Account ⇒ Vanguard Dividend Appreciation		12/22/2016	P	\$50,001 - \$100,000	
Welch Account ⇒ Vanguard FTSE Developed Markets ETF		08/18/2016	P	\$15,001 - \$50,000	
Welch Account ⇒ Vanguard FTSE Europe ETF		12/28/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ Vanguard FTSE Europe ETF		12/22/2016	P	\$100,001 - \$250,000	
Welch Account ⇒ Vanguard FTSEEuropean ETF (VGK)		12/30/2016	P	\$15,001 - \$50,000	
Welch Account ⇒ Vanguard Mortgage-Business Securities ETF		11/17/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Vanguard Telecommunication Services ETF		01/19/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Vanguard Telecommunications Services ETF		11/30/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Vanguard Telecommunications Services ETF		07/12/2016	P	\$1,001 - \$15,000	
Welch Account ⇒ Vermont Municipal Bond Bank		12/15/2016	P	\$1,001 - \$15,000	
DESCRIPTION: 12.1.31 5%					
Welch Account ⇒ Wells Fargo & Company (WFC)		11/10/2016	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Welch Account ⇒ Whole Foods Market, Inc. (WFM)		09/30/2016	P	\$1,001 - \$15,000	
Welch Account ⇒		06/21/2016	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Williams-Sonoma, Inc. Common Stock (WSM)					
Welch Account ⇒ Williams-Sonoma, Inc. Common Stock (WSM)		11/9/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Wolverine World Wide, Inc. (WWW)		02/4/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Welch Account ⇒ Xerox Corporation (XRX)		06/20/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Public Service Board	Spouse	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Mascoma Savings Bank	2011	Mortgage (Property: Norwich, Vermont)	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Ripon Society/Franklin Center	11/9/2016	11/14/2016	Burlington, VT - London, UK - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aspen Institute	04/30/2016	05/5/2016	Washington, DC - Berlin, Germany - Boston, MA	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Welch Account
LOCATION: US

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

1) All bonds not listed this year were either called or redeemed

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. Peter Welch , 05/15/2017