



Filing ID #10052322

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 06/8/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Capital One Savings Account [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
D3 Irrevocable Trust ⇒ John Hancock 529 Enrollment Portfolio A (JEHAX) [MF]	DC	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
D3 Irrevocable Trust ⇒ John Hancock 529 Fixed Income Portfolio A (JHFAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
D3 Irrevocable Trust ⇒ John Hancock 529 Short Term Bond Portfolio A (JHSAX) [MF]	DC	None	Tax-Deferred		<input checked="" type="checkbox"/>
D3 Irrevocable Trust ⇒ John Hancock 529 Stable Value Portfolio A (JAJWX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
D3 Irrevocable Trust ⇒ Sequoia Fund (SEQUX) [MF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
DC Co-op [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Washington, DC, US					
Eastern Bank Account [BA]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
Family Home (non-primary) [RP]					
	JT	\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Truro, MA, US					
Fidelity Brokerage Account ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Brokerage Account ⇒ United States Treasury Notes [GS]	JT	\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Rollover IRA ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Rollover IRA ⇒ SPDR S&P 500 ETF Trust (SPY) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity Rollover IRA ⇒ United States Treasury Notes [GS]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Apple Inc. (AAPL) [ST]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Ford Motor Company (F) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ FS Energy and Power Fund [HE]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Judith S. Clark Irrevocable Trust ⇒ GDB Debt Recovery Auth of Commonwealth of Puerto Rico [GS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: 7.50%; 08/20/40					
Judith S. Clark Irrevocable Trust ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ JP Morgan Chase & Co. SR NT [CS]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: 3.25%; 9/23/22; Fully Matured					
Judith S. Clark Irrevocable Trust ⇒ KB HOME SR NT 7.500% [CS]		None	Capital Gains, Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: 7.500%; 9/15/22					
Judith S. Clark Irrevocable Trust ⇒ Microsoft Corporation (MSFT) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Natwest Group PLC Note [CS]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: 6.000%; 12/19/23					
Judith S. Clark Irrevocable Trust ⇒ NETAPP INC SR NT [CS]		None	Capital Gains, Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: 3.250%; 12/15/22					
Judith S. Clark Irrevocable Trust ⇒ New York Community Bancorp, Inc. (NYCB) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ SPDR S&P 500 ETF Trust (SPY) [EF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ STATE STR CORP SR SUB NT [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: 3.100%; 05/15/23					
Judith S. Clark Irrevocable Trust ⇒ Verizon Communications Inc. (VZ) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒ Walt Disney Company (DIS) [ST]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Judith S. Clark Irrevocable Trust ⇒		\$1 - \$1,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Warner Bros. Discovery, Inc. - Series A (WBD) [ST]					
DESCRIPTION: Received shares of Warner Bros. Discovery, Inc. (WBD) in exchange for AT&T Inc. (T) as a result of spinoff.					
Judith S. Clark Irrevocable Trust ⇒ WELLS FARGO & CO NEW MEDIUM TERM SR NTS FXD RT SER M [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: 4.125%; 08/15/23					
Katherine Clark Traditional IRA ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Katherine Clark Traditional IRA ⇒ SPDR S&P 500 ETF Trust (SPY) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Katherine M. Clark Exempt Trust ⇒ Acacia Partners LP [HE]		\$1,001 - \$15,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Asset inherited in January 2020					
Katherine M. Clark Exempt Trust ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Katherine M. Clark Exempt Trust ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Exempt Trust ⇒ SPDR S&P 500 ETF Trust (SPY) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Acacia Partners LP [HE]		\$1,001 - \$15,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Asset inherited in January 2020					
Katherine M. Clark Separate Share Trust ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Annaly Capital Management Inc (NLY) [RE]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Apple Inc. (AAPL) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America Corporation (BAC) [ST]					
Katherine M. Clark Separate Share Trust ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Coca-Cola Company (KO) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ FCASH [BA]		\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Financial Select Sector SPDR ETF (XLF) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ International Business Machines Corporation (IBM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ New York Community Bancorp, Inc. (NYCB) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Oakmark Investor (OAKMX) [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Pfizer, Inc. (PFE) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Ruane, Cunniff, & Goldfarb Inc. [PS]		\$250,001 - \$500,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
DESCRIPTION: investment adviser					
COMMENTS: This inherited asset is subject to mandatory buyback outside the control and/or consent of Katherine Clark or her agents.					
Katherine M. Clark Separate Share Trust ⇒ Schwab International Equity ETF (SCHF) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Katherine M. Clark Separate Share Trust ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ SPDR S&P 500 ETF Trust (SPY) [EF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Sprint Nextel Corp SR DEB [CS]		None	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: 9.25%; 4/15/22; Fully Matured					
Katherine M. Clark Separate Share Trust ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Katherine M. Clark Separate Share Trust ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Received shares of Warner Bros. Discovery, Inc. (WBD) in exchange for AT&T Inc. (T) as a result of spinoff.					
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Blue Chip Growth Fund Class K (FBGKX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Environment and Alternative Energy Fund (FSLEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Massachusetts state pension [PE]		Undetermined	None		<input type="checkbox"/>
PERAPlus 401(K) Plan ⇒ PERAdvantage 2030 Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Provider changed from COPERA to PERAPlus					
PERAPlus 401(K) Plan ⇒ PERAdvantage US Large Cap Stock [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Provider changed from COPERA to PERAPlus					
Sequoia Fund (SEQUX) [MF]	JT	\$250,001 -	Capital Gains,	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$500,000		Dividends	

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
D3 Irrevocable Trust ⇒ John Hancock 529 Enrollment Portfolio A (JEHAX) [MF]	DC	08/15/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
D3 Irrevocable Trust ⇒ John Hancock 529 Enrollment Portfolio A (JEHAX) [MF]	DC	12/20/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
D3 Irrevocable Trust ⇒ John Hancock 529 Short Term Bond Portfolio A (JHSAX) [MF]	DC	12/2/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
D3 Irrevocable Trust ⇒ John Hancock 529 Stable Value Portfolio A (JAJWX) [MF]	DC	12/2/2022	P	\$15,001 - \$50,000	
Fidelity Brokerage Account ⇒ United States Treasury Notes [GS]	JT	03/23/2022	P	\$250,001 - \$500,000	
Fidelity Brokerage Account ⇒ United States Treasury Notes [GS]	JT	04/5/2022	P	\$100,001 - \$250,000	
Fidelity Rollover IRA ⇒ SPDR S&P 500 ETF Trust (SPY) [EF]	SP	01/11/2022	P	\$15,001 - \$50,000	
Fidelity Rollover IRA ⇒ United States Treasury Notes [GS]	SP	03/31/2022	P	\$100,001 - \$250,000	
Judith S. Clark Irrevocable Trust ⇒ AT&T Inc. (T) [ST]		04/8/2022	E	\$1,001 - \$15,000	
DESCRIPTION: AT&T (T) exchanged for Warner Bros. Discovery, Inc. - Series A (WBD) following spin-off.					
Judith S. Clark Irrevocable Trust ⇒ KB HOME SR NT 7.500% [CS]		07/7/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: 7.500%; 9/15/22					
Judith S. Clark Irrevocable Trust ⇒ NETAPP INC SR NT [CS]		09/15/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: 3.250%; 12/15/22					
Katherine M. Clark Separate Share Trust ⇒ AT&T Inc. (T) [ST]		04/8/2022	E	\$1,001 - \$15,000	
DESCRIPTION: AT&T (T) exchanged for Warner Bros. Discovery, Inc. - Series A (WBD) following spin-off.					
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	04/6/2022	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	09/9/2022	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Dividend Growth Fund Class K (FDGKX) [MF]	SP	10/4/2022	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Environment and Alternative Energy Fund (FSLEX) [MF]	SP	04/6/2022	P	\$1,001 - \$15,000	
Massachusetts BBO Elective Deferral Plan ⇒ Fidelity Environment and Alternative Energy Fund (FSLEX) [MF]	SP	10/4/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	01/4/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	02/3/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	03/2/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	04/6/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	05/3/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	05/6/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	06/2/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	06/29/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	07/5/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	07/21/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	08/3/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	09/7/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	10/4/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	11/3/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	12/6/2022	P	\$1,001 - \$15,000	
Massachusetts BBO IRA ⇒ Fidelity Freedom 2030 K (FFFEX) [MF]	SP	12/29/2022	P	\$1,001 - \$15,000	
Sequoia Fund (SEQUX) [MF]	JT	06/13/2022	P	\$1,001 - \$15,000	

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Massachusetts Board of Bar Overseers	Spouse Salary	N/A
Eversource Smartsolar	MA Solar Energy Credit	\$1,791.54
National Financial Services LLC	Inherited IRA Distribution	\$30,576.53

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Nationstar Mortgage LLC d/b/a Mr. Cooper	April 2020	Mortgage	\$250,001 - \$500,000
	COMMENTS: Mortgage purchased by Nationstar Mortgage LLC from CENLAR; mortgage paid in full 2/28/2022.			
JT	Caliber Home Loans, Inc.	July 2021	Mortgage	\$250,001 - \$500,000
JT	Capitol Hill Tower Housing Cooperative, Inc.	September 2021	Co-op building loan	\$100,001 - \$250,000
JT	Nationstar Mortgage LLC d/b/a Mr. Cooper	September 2021	Mortgage (primary residence)	\$500,001 - \$1,000,000
	COMMENTS: Amount reported in CY 2021 also should have been reported as \$500,001-\$1,000,000.			
JT	Quorum Federal Credit Union	September 2021	Mortgage (primary residence)	\$100,001 - \$250,000
	COMMENTS: Mortgage paid in full 08/09/2022.			

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

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

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- D3 Irrevocable Trust (Owner: DC)
- Fidelity Brokerage Account (Owner: JT)
LOCATION: US
- Fidelity Rollover IRA (Owner: SP)
DESCRIPTION: Transferred from Ameriprise in September 2021.
- Judith S. Clark Irrevocable Trust
- Katherine Clark Traditional IRA
- Katherine M. Clark Exempt Trust
DESCRIPTION: Inherited April 5, 2019
- Katherine M. Clark Separate Share Trust
DESCRIPTION: inherited April 5, 2019
- Massachusetts BBO Elective Deferral Plan (Owner: SP)
- Massachusetts BBO IRA (Owner: SP)
- PERAPlus 401(K) Plan

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

CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Katherine M. Clark , 06/8/2023