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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Robert J. Wittman
Status: Member
State/District: VA01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
401 (a) Cash Match Plan [OT]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Commonwealth of Virginia 401 (a) Cash Match Plan					
457 Deferred Compensation Plan [OT]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Commonwealth of Virginia 457 Deferred Compensation Plan 25% Asset Allocation Funds 75% Stock Funds					
Accenture plc Class A Ordinary Shares (ACN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Allergan plc Ordinary Shares (AGN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Anthem, Inc. (ANTM) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
AXA Equitable Life Ins Co ⇒ AXA/Legg Mason Strat Alloc GB [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bay Banks Of Virginia Inc (BAYK) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Becton, Dickinson and Company (BDX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
BlackRock, Inc. (BLK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Chevron Corporation (CVX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Chevron Corporation (CVX) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Chubb Limited (CB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Cisco Systems, Inc. (CSCO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
CME Group Inc. - Class A (CME) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Colgate-Palmolive Company (CL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Comcast Corporation - Class A (CMCSA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
CVS Health Corporation (CVS) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
CyrusOne Inc (CONE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
D/B/A Chubb Limited New (CB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Dominion Energy Corporation [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Duke Energy Corporation (DUK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity National Information Services, Inc. (FIS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Hartford Financial Services Group, Inc. (HIG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Honeywell International Inc. (HON) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Ingersoll-Rand plc (IR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Interpublic Group of Companies, Inc. (IPG) [ST]		None	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Ishares Edge MSCI MIN VOL EAFE [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Ishares S&P US PFD Stk Idx Fd [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
ITT Corporation Common Stock New (ITT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Johnson & Johnson (JNJ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Linde plc Ordinary Share (LIN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Lowe's Companies, Inc. (LOW) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Marriott International - Class A (MAR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Marsh & McLennan Companies, Inc. (MMC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Medtronic plc. Ordinary Shares (MDT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Met Life (Universal Life Insurance) [WU]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Met Life (Universal Life Insurance) [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Met Life Inc. 6.5% Series B [WU]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Mondelez International, Inc. - Class A (MDLZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Monsanto Company (MON) [ST]		None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ AB Global Bond Adv [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ AB Global Bond Adv [MF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley ⇒ American Express Company (AXP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ American Express Company (AXP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ AMG Timessquare Intl Sm Cap [MF]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Anthem, Inc. (ANTM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Anthem, Inc. (ANTM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ Anthem, Inc. (ANTM) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Blackrock Straregic Inc Opp I [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Blackrock Strategic Inc Opp 1 [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Blackrock Strategic Inc Opp I [MF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley ⇒ CVS Health Corporation (CVS) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ CVS Health Corporation (CVS) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley ⇒ Federated Fund U.S. Government Securities [GS]		None	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ First Eagle Overseas [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ First Eagle Overseas I [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Internationa Flavors & Fragrances, Inc. (IFF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Internationa Flavors & Fragrances, Inc. (IFF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Ishares Edge MSCI Min Vol Eafe [MF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Ishares Edge MSCI Min Vol EAFE [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Ishares MSCI Eafe Cap ETF [MF]		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Ishares Russell 2000 Value ETF [MF]		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Metropolitan West Tot Ret BD I [MF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Metropolitan West Total Return [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Morgan Stanley Bank Money Market [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Neuberger Intrinsic Value Inst [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Philip Morris International Inc (PM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley ⇒ Principal Midcap Instl [MF]		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Principal Midcap Instl [MF]		\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Principal Preferred Sec Inst [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Principal Spc Pfr&Sec Inc i [MF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Principal Spc Prf&Sec Inc I [MF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Putnam Short Duration Income A [MF]		None	None		<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Schlumberger N.V. (SLB) [ST]		None	None		<input checked="" type="checkbox"/>
Morgan Stanley ⇒ SPDR S&P 500 ETF Trust [MF]		None	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Vanguard FTSE Emerging Markets [MF]		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Vanguard Short Term Bnd [MF]		None	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Virtus Vontobel Emrg Mks Opp i [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Virtus Vontobel Foreign Opp I [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley Bank N.A. [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Alliance Bernstein Income Adv [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Cons Discret Sel Sect SPDR [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley INH IRA ⇒ Dollar General Corporation (DG) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Dollar General Corporation (DG) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Eaton Vance Focused Growth Opp A [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Eaton Vance Glbl Macro Abs Ret Adv A [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Eaton Vance Multi Strategy All A [MF]	SP	None	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Eaton Vance Short Duration Govt Inc A [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ EV Short Dur Infl Protected Income A [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Rising Div Achiev [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Senior Loan Fund [MF]		None	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Utilts Alphadex EFT [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Utilts Alphadex ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ FT-Preferred Secur & Inc ETF [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Global X US Inf Dev ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Goldman Activebeta US LC ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Goldman ActiveBeta US LC ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley INH IRA ⇒ Guggenheim Macro Opport I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Health Care Sel Sect Spdr Fd [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco Aerospace & Defense EFT [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco FTSE RAFI Emerging [MF]		None	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco QQQ TR [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco S&P 500 Equal Weight ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco S&P Equal Weight E [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares 10-20 yr Treasu Bd ETF [MF]		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares 20+yr Treasu Bond ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Eafe EF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Eafe ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Emeging [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Emerging [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Emerging [MF]		None	None		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core S&P 500 ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley INH IRA ⇒ Ishares Edge MSCI Min Vol USA [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI Asia Ex Japan ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI Canada ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI Eafe ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI Eafe Grwth ETF (EFG) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares SP Smallcap 600 Index [MF]		None	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares US Consumer Goods ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares US Fin Services ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares US Medical Dev ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares US Technology ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ JP Morgan Betabuilders Japan ET [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ JP Morgan Income Builder I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ JPM Diversified Ret Intl Eq [MF]		None	None		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Pimco Inv Grade Corp Bd [MF]		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Principal GLB Dives Inc West [MF]					
Morgan Stanley INH IRA ⇒ ProLogis, Inc. (PLD) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ ProLogis, Inc. (PLD) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Proshares RSL 2000 DVD ETF [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ S&P 500 Index Fund [MF]		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Blackstone GSO Sen Loan [MF]		None	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Starbucks Corporation (SBUX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Starbucks Corporation (SBUX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ The Financial Sel Sect SPDR FD [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vaneck Vectors JP Morgan [MF]		None	None		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard Intermediate Term Gov [MF]		None	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard Short Term Corporate [MF]		None	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley INH IRA ⇒ Vanguard Total Bond Market [MF]		None	None		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard Total Bond Market [MF]		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Virtus Vontobel Foreign Opp [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Wisdomtree US Largecap Div Fnd [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Wisdontree Japan Sm Cap Div [MF]		None	None		<input checked="" type="checkbox"/>
National Western Life Annuity [OT]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: This is a 403b TSA					
Nationwide Geneva Smcp Gw F [MF]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Nielsen N.V. Ordinary Shares (NLSN) [ST]		None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Packaging Corporation of America (PKG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Peoples Bankshares, Inc [PS]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Peoples Community Bank Stock					
Peoples Community Bank Accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
People's United Financial, Inc. (PBCT) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
PEPCO Holdings, Inc (POM) [ST]		None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Pepsico, Inc. (PEP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Pfizer, Inc. (PFE) [ST]		None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Phillips 66 (PSX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Piedmont Office Realty Trust, Inc. Class A (PDM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Putnam Short Duration Income A [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Realty Income Corporation (O) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Rental House - Nags Head, NC [RP]	JT	\$500,001 - \$1,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Nags Head, NC, US					
Rental Property - Montross VA [RP]	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Montross, VA, US					
Schwab INH IRA ⇒ Invesco Russell 1000 R Dyn ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Schwab INH IRA ⇒ Morgan Stanley Bank N.A. [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SPDR BBG Bar Intl Treasury Bnd [MF]		None	None		<input checked="" type="checkbox"/>
Texas Instruments Incorporated (TXN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Union Pacific Corporation (UNP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard FTSE Developed Markets EFT [MF]		None	None		<input checked="" type="checkbox"/>
Vanguard Total Bond Market [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Verizon Communications Inc. (VZ) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Virginia Commonwealth Bank Money Market Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Virginia Retirement System [PE]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Virginia Retirement System [PE]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
WEC Energy Group, Inc. (WEC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Whirlpool Corporation (WHR) [ST]		None	None		<input type="checkbox"/>
Xylem Inc. Common Stock New (XYL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

* 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?
Apple Inc. (AAPL) [ST]		04/17/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
AssetMark Trust Co ⇒ Eaton Vance Multi Strategy [MF]	SP	04/18/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Federated Fund for US Govt Securities [MF]		11/22/2019	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Interpublic Group of Companies, Inc. (IPG) [ST]		07/25/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Monsanto Company (MON) [ST]		12/31/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ AB Global Bond Adv [MF]		01/22/2019	P	\$15,001 - \$50,000	
Morgan Stanley ⇒		12/31/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
AB Global Bond Adv [MF]					
Morgan Stanley ⇒ American Express Company (AXP) [ST]		08/14/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ AMG Timesquare Intl Sm Cap [MF]		01/22/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Anthem, Inc. (ANTM) [ST]		11/8/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Blackrock Strategic Inc Opp [MF]		12/31/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Blackrock Strategic Inc Opp I [MF]		01/22/2019	P	\$15,001 - \$50,000	
Morgan Stanley ⇒ BlackRock, Inc. (BLK) [ST]		08/15/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ CVS Health Corporation (CVS) [ST]		01/22/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ CVS Health Corporation (CVS) [ST]		11/5/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ CVS Health Corporation (CVS) [ST]		01/22/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Federated FD for US Govt Sec A [MF]		11/22/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley ⇒ First Eagle Overseas I [MF]		01/22/2019	P	\$15,001 - \$50,000	
Morgan Stanley ⇒ First Eagle Overseas I [MF]		12/31/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Internationa Flavors & Fragrances, Inc. (IFF) [ST]		11/29/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Ishares Edge MSCI Min Vol EAFE [MF]		09/4/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley ⇒ Ishares Edge MSCI Min Vol EAFE [MF]		12/31/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Ishares MSCI EAFE SM Cap ETF [MF]		01/22/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Ishares Russell 2000 Value ETF [MF]		01/22/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Metropolitan West Tot Ret BD I [MF]		12/31/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Metropolitan West Total Return [MF]		01/22/2019	P	\$15,001 - \$50,000	
Morgan Stanley ⇒ Neuberger Intrinsic Value Inst [MF]		01/22/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Pfizer, Inc. (PFE) [ST]		01/10/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Philip Morris International Inc (PM) [ST]		01/22/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Philip Morris International Inc (PM) [ST]		01/22/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		01/8/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Principal Midcap Instl [MF]		11/26/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Principal Preferred Sec Inst [MF]		01/22/2019	P	\$15,001 - \$50,000	
Morgan Stanley ⇒ Principal Spc Pfr&Cp Sec Inc I [MF]		12/31/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Putnam Short Duration Income A [MF]		04/8/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ S&P 500 Index Fund [MF]		05/22/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley ⇒ Schlumberger N.V. (SLB) [ST]		01/22/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Schlumberger N.V. (SLB) [ST]		06/10/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Schlumberger N.V. (SLB) [ST]		01/22/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Schlumberger N.V. (SLB) [ST]		06/10/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ SPDR BBG Bar Intl Treasury Bnd [MF]		01/22/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley ⇒ SPDR S&P 500 ETF Trust [MF]		01/22/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Vanguard FTSE Emerging Markets [MF]		01/22/2019	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Vanguard Short Term Bnd [MF]		01/22/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley ⇒ Vanguard Total Bond Market [MF]		01/22/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley ⇒ Virtus Vontobel Emrg Mks Opp i [MF]		01/22/2019	P	\$15,001 - \$50,000	
Morgan Stanley ⇒ Virtus Vontobel Foreign Opp I [MF]		01/22/2019	P	\$15,001 - \$50,000	
Morgan Stanley INH IRA ⇒ Alliance Bernstein Income Adv [MF]	SP	11/18/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Dollar General Corporation (DG) [ST]		09/4/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Eaton Vance Focused Growth Opp A [MF]	SP	11/15/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ Eaton Vance Global Macro Abs Ret Adv A [MF]	SP	11/15/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Eaton Vance Invest Grade Inc A [MF]	SP	07/22/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Eaton Vance Short Dur Infl Protec Inc A [MF]	SP	11/15/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Rising Div Achiev [MF]	SP	11/18/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ First Trust Senior Loan Fund [MF]		03/8/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Utlts Alphasdex ETF [MF]		09/4/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ FT-Preferred Secur & Inc ETF [MF]	SP	11/18/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Goldman Activebeta US LC ETFD [MF]		09/4/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Invesco FSE Rafi Emer Mrkts [MF]		05/31/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco Russell 1000 R Dyn ETF [MF]		07/24/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Invesco S&P 500 Equal Weight E [MF]		07/25/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Ishares 10-20 yr Treasu Bd ETF [MF]		08/16/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares 20+yr Treasu Bond ETF [MF]		03/20/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Eafe EF [MF]		05/31/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Emerging [MF]		01/10/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Emerging [MF]		08/16/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core S&P 500 ETF [MF]		01/24/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Ishares Edge MSCI Min Vol USA [MF]	SP	11/18/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Ishares FTSE MSCI Emerging [MF]		11/15/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Ishares MSCI Asia Ex-Japan ETF [MF]		05/31/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares SP Smallcap 600 Index [MF]		01/24/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Ishares SP Smallcap 600 Index [MF]		09/4/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares US Fin Services ETF [MF]		11/15/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ JP Morgan Income Builder I [MF]	SP	11/18/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ JPM Diversified Ret Intl Eq [MF]		03/8/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ JPM Diversified RET Intl EQ [MF]		05/31/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Pimco Inv Grade Corp BD [MF]		08/16/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Principal GLB Divers Inc Insrt [MF]	SP	11/18/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ ProLogis, Inc. (PLD) [ST]		09/4/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒	SP	11/18/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Proshares RSL 2000 DVD ETF [MF]					
Morgan Stanley INH IRA ⇒ SPDR Blackstone GSO Sen Loan [MF]		03/12/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Starbucks Corporation (SBUX) [ST]		09/4/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		09/4/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Vaneck Vecrors JP Morgan [MF]		01/10/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Vaneck Vectors JP Morgan [MF]		11/15/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard Intermediate Term Gov [MF]		01/10/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard Short Term Corporate [MF]		11/15/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard Short-Term Corporate [MF]		08/16/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Vanguard Total Bond Market [MF]		03/8/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Vanguard Total Bond Market [MF]		03/20/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Vanguard Total Bond Market [MF]		08/20/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Virtus Vontobel Foreign Opp (I [MF]	SP	11/18/2019	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Wisdomtree Japan SM Cap Div [MF]		03/8/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Nielsen N.V. Ordinary Shares (NLSN) [ST]		12/31/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
PEPCO Holdings, Inc (POM) [ST]		12/31/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard FTSE Developed Markets [MF]		01/16/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
Whirlpool Corporation (WHR) [ST]		12/31/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>

* 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
Westmoreland County Public Schools	Spouse salary	N/A
Morgan Stanley	IRA Distribution - spouse	N/A
Morgan Stanley	IRA Distribution	\$5,796.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of Lancaster, Virginia	Feb 2012	Mortgage on residence	\$100,001 - \$250,000
JT	Virginia Commonwealth Bank	November 2018	Real property at Nags Head, NC	\$500,001 - \$1,000,000
JT	Flagstar Bank	June 2019	Mortgage on rental - Montross,, VA	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
August 1981	Virginia Retirement System	Defined Benefit

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

Source	Activity	Date	Amount	Charity Name
Sportsfishing Magazine	Article	08/16/2019	\$400.00	Conservation & Protection of Marine Life

SCHEDULE A AND B ASSET CLASS DETAILS

- AssetMark Trust Co (Owner: SP)
- AXA Equitable Life Ins Co (Owner: SP)
- Morgan Stanley
- Morgan Stanley (Owner: SP)
LOCATION: US
- Morgan Stanley INH IRA
- Morgan Stanley INH IRA (Owner: SP)
- Schwab INH IRA

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. Robert J. Wittman , 08/13/2020