



Filing ID #10056220

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: April McClain Delaney
Status: Congressional Candidate
State/District: MD06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 02/22/2024
Period Covered: 01/01/2023– 01/23/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
2015 Insurance Trust ⇒ Mass Mutual, whole life [WU]		\$500,001 - \$1,000,000	None		
2015 Insurance Trust ⇒ Wells Fargo - Checking [BA]		\$1,001 - \$15,000	None		
Acacia Partners, LP [HE]	JT	\$5,000,001 - \$25,000,000	Partnership Income	None	\$100,001 - \$1,000,000
Alliance Partners Holdings, LLC [OL]	SP	\$100,001 - \$250,000	Ordinary Income	None	\$50,001 - \$100,000
LOCATION: Chevy Chase, MD, US					
DESCRIPTION: Banking					
Allstate, variable annuity ⇒ Fixed 1 Year 11/5/22 at 3% [FN]	JT	\$500,001 - \$1,000,000	None		
Allstate, variable annuity ⇒ Invesco VI S&P 500 Index Port - Series I [MF]	JT	\$250,001 - \$500,000	None		
Allstate, variable annuity ⇒	JT	\$250,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley - VIS Multicap Growth Port - Class X [MF]		\$500,000			
AMD o9 LLC ⇒ Federated Treasury Obligations Fund - (TOIXX) [GS]		\$1,000,001 - \$5,000,000	Dividends	None	\$15,001 - \$50,000
AMD o9 LLC ⇒ Forbright, Inc. [PS]		\$1,000,001 - \$5,000,000	None		
DESCRIPTION: Bank stock					
AMD o9 LLC ⇒ Wells Fargo, N.A. [BA]		\$250,001 - \$500,000	Interest	None	\$2,501 - \$5,000
American Steadfast, LP (hedge fund) [HE]	JT	\$5,000,001 - \$25,000,000	Partnership Income	None	\$100,001 - \$1,000,000
Cloister Cottage Venture, LLC ⇒ Investment in Residential Property [RP]	SP	\$1,000,001 - \$5,000,000	Rent	None	\$50,001 - \$100,000
LOCATION: Sea Island, GA, US					
Cloister Cottage Venture, LLC ⇒ Investment in Residential Property [RP]		\$1,000,001 - \$5,000,000	Rent	None	\$50,001 - \$100,000
LOCATION: Sea Island, GA, US					
Cloister Cottage Venture, LLC ⇒ Wells Fargo - Checking [BA]	SP	\$15,001 - \$50,000	None		
Cloister Cottage Venture, LLC ⇒ Wells Fargo - Checking [BA]		\$15,001 - \$50,000	None		
DC Insurance Trust ⇒ Wells Fargo - Checking [BA]	DC	\$1,001 - \$15,000	None		
DC Insurance Trust ⇒ Pacific Life ⇒ BlackRock Global Allocation VI Fund III (GAIII) [OT]	DC	\$50,001 - \$100,000	None		
DESCRIPTION: Mutual Fund					
DC Insurance Trust ⇒ Pacific Life ⇒ Fidelity VIP Contrafund 2 (IFVCX) [MF]	DC	\$250,001 - \$500,000	None		
DC Insurance Trust ⇒ Pacific Life ⇒ Fidelity VIP Mid Cap Class 2 [MF]	DC	\$100,001 - \$250,000	None		
DC Insurance Trust ⇒ Pacific Life ⇒	DC	\$100,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MFS International Large Cap [MF]		\$250,000			
DC Insurance Trust ⇒ Pacific Life ⇒ Morgan Stanley PSF Real Estate Portfolio [MF]	DC	\$50,001 - \$100,000	None		
DC Insurance Trust ⇒ Pacific Life ⇒ PIMCO VIT Global Multi-Asset Managed - Allocation Advisor Class [MF]	DC	\$50,001 - \$100,000	None		
DC Insurance Trust ⇒ Pacific Life ⇒ Van Eck VIP Global Hard Assets [MF]	DC	\$15,001 - \$50,000	None		
East Capitol Venture, LLC ⇒ Allspring C&B Large Cap Value Fund-R6 (CBEJX) [MF]		\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000
East Capitol Venture, LLC ⇒ Eaton Vance Global Macro Absolute Return Advantage - Class R6 (EGRSX) [MF]		\$50,001 - \$100,000	Dividends	None	\$1,001 - \$2,500
East Capitol Venture, LLC ⇒ Federated Treasury Cash Reserves #125 [BA]		\$50,001 - \$100,000	Dividends	None	\$1,001 - \$2,500
DESCRIPTION: money market fund					
East Capitol Venture, LLC ⇒ Invesco Developing Markets Fund Class R6 (ODVIX) [MF]		\$100,001 - \$250,000	Dividends	None	\$201 - \$1,000
East Capitol Venture, LLC ⇒ Investment in Residential Property [RP]		\$1,000,001 - \$5,000,000	Rent	None	\$15,001 - \$50,000
LOCATION: Washington, DC, US					
East Capitol Venture, LLC ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
East Capitol Venture, LLC ⇒ Lazard Global Listed Infrastructure Ptf Insti Shs (GLIFX) [MF]		\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
East Capitol Venture, LLC ⇒ MFS Value Fund Class R6 (MEIKX) [MF]		\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000
East Capitol Venture, LLC ⇒ Pimco CommodityRealReturn Strategy Fund Institutional Class (PCRIX) [MF]		\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
East Capitol Venture, LLC ⇒ Principal Funds, Inc. - MidCap Fund, Class R6 (PMAQX) [MF]		\$100,001 - \$250,000	None		
East Capitol Venture, LLC ⇒ T. Rowe Price Institutional Floating Rate Fund (RPIFX) [MF]		\$100,001 - \$250,000	Dividends	None	\$5,001 - \$15,000
East Capitol Venture, LLC ⇒ Touchstone Sands Capital Emerging Markets Growth Fund Class R6 (TSRMX) [MF]		\$100,001 - \$250,000	None		
East Capitol Venture, LLC ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]		\$250,001 - \$500,000	Dividends	None	\$5,001 - \$15,000
East Capitol Venture, LLC ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$500,001 - \$1,000,000	Dividends	None	\$5,001 - \$15,000
East Capitol Venture, LLC ⇒ Virtus AlphaSimplex Global Alternatives Fund Class R6 (GAFNX) [MF]		\$50,001 - \$100,000	Dividends	None	\$1,001 - \$2,500
East Capitol Venture, LLC ⇒ Wells Fargo - Checking [BA]		\$15,001 - \$50,000	None		
Enlightenment Capital Solutions Fund II, LP [HE]		\$250,001 - \$500,000	Partnership Income	None	\$100,001 - \$1,000,000
DESCRIPTION: private equity in buyout growth					
EVR Investment, LLC ⇒ Eloy Investors LLC [RP]	SP	\$500,001 - \$1,000,000	None		
LOCATION: Scottsdale, AZ, US					
DESCRIPTION: raw land for future development					
Farallon Capital Partners, LP (hedge fund) [HE]	JT	\$5,000,001 - \$25,000,000	Partnership Income	None	\$100,001 - \$1,000,000
FFL Executive Partners IV, LP [OT]	SP	\$250,001 - \$500,000	Partnership Income	None	\$50,001 - \$100,000
DESCRIPTION: Private Equity. Fund manager letter on file with the Committee on Ethics.					
Forbright, Inc. [PS]	JT	\$25,000,001 - \$50,000,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Bank stock					
Forbright, Inc., call option [OP]	SP	Spouse/DC Over \$1,000,000	None		
DESCRIPTION: Options					
Healthpoint Capital Partners II, LP [HE]	JT	\$15,001 - \$50,000	None		
DESCRIPTION: private equity in healthcare					
J.P. Morgan - Brokerage ⇒ Federated US Treasury Cash Reserves #125 - money market [BA]	SP	None	Interest	None	\$5,001 - \$15,000
J.P. Morgan - Brokerage ⇒ JPM 100% US Treasury Fund [GS]	SP	\$100,001 - \$250,000	Interest	None	\$2,501 - \$5,000
J.P. Morgan - Brokerage ⇒ PacWest Bancorp (PACW) [ST]	SP	\$100,001 - \$250,000	Dividends	None	\$15,001 - \$50,000
J.P. Morgan - Brokerage ⇒ US DOLLAR JPM DEPOSIT SWEEP [BA]	SP	\$100,001 - \$250,000	Interest	None	\$201 - \$1,000
JKD o9 LLC ⇒ Federated Treasury Obligations Fund - (TOIXX) [GS]	SP	Spouse/DC Over \$1,000,000	Dividends	None	\$15,001 - \$50,000
JKD o9 LLC ⇒ Forbright, Inc. [PS]	SP	Spouse/DC Over \$1,000,000	None		
DESCRIPTION: Bank stock					
JKD o9 LLC ⇒ Wells Fargo, N.A. [BA]	SP	\$500,001 - \$1,000,000	Interest	None	\$2,501 - \$5,000
JPM US Treasury [GS]	JT	\$5,000,001 - \$25,000,000	Interest	None	\$100,001 - \$1,000,000
Mass Mutual - Whole Life [WU]	SP	\$50,001 - \$100,000	None		
Mazara, LLC ⇒ Investment in Real Property [RP]	SP	\$250,001 - \$500,000	Rent	None	\$50,001 - \$100,000
LOCATION: Cabo, San Lucas, MX					
Notes receivables - Key Bridge Partners LLC, Bethesda, MD [DO]	JT	None	Interest	None	\$15,001 - \$50,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Pacific West - Checking [BA]	SP	\$50,001 - \$100,000	None		
Parkglen, LLC ⇒ Demand loan to family member [DO] DESCRIPTION: Dependent Child #1	DC	\$250,001 - \$500,000	Interest	None	\$2,501 - \$5,000
Parkglen, LLC ⇒ Demand loan to family member [DO] DESCRIPTION: Dependent Child #2	DC	\$250,001 - \$500,000	Interest	None	\$2,501 - \$5,000
Parkglen, LLC ⇒ Wells Fargo - Checking [BA] DESCRIPTION: Dependent Child #1	DC	\$1,001 - \$15,000	None		
Parkglen, LLC ⇒ Wells Fargo - Checking [BA] DESCRIPTION: Dependent Child #2	DC	\$1,001 - \$15,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Acacia Partners, LP [HE]	DC	Spouse/DC Over \$1,000,000	Partnership Income	None	\$100,001 - \$1,000,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Alliance Partners Holdings, LLC [OL] LOCATION: Chevy Chase, MD, US DESCRIPTION: Banking	DC	\$250,001 - \$500,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ American Steadfast, LP [HE]	DC	Spouse/DC Over \$1,000,000	Partnership Income	None	\$100,001 - \$1,000,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab Bank [BA]	DC	\$250,001 - \$500,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Demand loan to family member [DO]	DC	\$250,001 - \$500,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒	DC	\$15,001 - \$50,000	Partnership Income	None	\$100,001 - \$1,000,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Enlightenment Capital Solutions Fund II, LP [HE] DESCRIPTION: private equity in buyout growth					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Enlightenment Capital Solutions Fund III, LP [HE]	DC	\$100,001 - \$250,000	Partnership Income	None	\$50,001 - \$100,000
DESCRIPTION: private equity in buyout growth					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Enlightenment Capital Solutions Fund IV, LP [HE]	DC	\$15,001 - \$50,000	None		
DESCRIPTION: pooled investment fund					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Forbright, Inc. [PS]	DC	\$100,001 - \$250,000	None		
DESCRIPTION: Bank stock					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Galvanize Innovation & Expansion Fund I, LP (HCP SPV) [OT]	DC	\$100,001 - \$250,000	None		
DESCRIPTION: private equity					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ GPC Partners Co-Investment (Chico), LP [OT]	DC	\$15,001 - \$50,000	None		
DESCRIPTION: pooled investment fund					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ HCP Private Equity Fund IX, LP [OT]	DC	\$250,001 - \$500,000	None		
DESCRIPTION: private equity					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ HCP Private Equity Fund VII, LP [OT]	DC	\$250,001 - \$500,000	None		
DESCRIPTION: private equity					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ HCP Private Equity Fund VIII, LP [OT]		Spouse/DC Over \$1,000,000	None		
DESCRIPTION: private equity					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family	DC	\$1,001 - \$15,000	None		

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Trust FBO Dependent Child #1 ⇒ Healthpoint Capital Partners II, LP [HE]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Hellman & Friedman Capital Partners IX, LP [OT] DESCRIPTION: private equity	DC	\$1,000,001 - \$5,000,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Mulberry Street [OT] DESCRIPTION: Mutual Fund	DC	Spouse/DC Over \$1,000,000	Dividends	None	\$100,001 - \$1,000,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Oakmark International Fund Investor Class (OAKIX) [MF] DESCRIPTION: private equity	DC	\$500,001 - \$1,000,000	Dividends	None	\$50,001 - \$100,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Ponderosa Ventures Fund I [OT] DESCRIPTION: private equity	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Revolution Growth GP IV, LP [OT] DESCRIPTION: venture capital fund	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Money Market [BA] DESCRIPTION: high-growth healthcare technology company	DC	\$100,001 - \$250,000	Interest	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Zephyr AI [PS] DESCRIPTION: high-growth healthcare technology company	DC	\$100,001 - \$250,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Bio-Techne Corp (TECH) [ST] DESCRIPTION: high-growth healthcare technology company	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Brown & Brown, Inc. (BRO) [ST] DESCRIPTION: high-growth healthcare technology company	DC	\$50,001 - \$100,000	Dividends	None	\$1,001 - \$2,500

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SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Ceridian HCM Holding Inc. (CDAY) [ST]	DC	\$50,001 - \$100,000	Capital Gains	None	\$5,001 - \$15,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Clean Harbors, Inc. (CLH) [ST]	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Core & Main, Inc. Class A Common Stock (CNM) [ST]	DC	\$15,001 - \$50,000	Capital Gains	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	\$15,001 - \$50,000	Capital Gains	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ ITT Inc. Common Stock (ITT) [ST]	DC	\$1,001 - \$15,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Live Nation Entertainment, Inc. Common Stock (LYV) [ST]	DC	\$15,001 - \$50,000	Capital Gains	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Martin Marietta Materials, Inc. Common Stock (MLM) [ST]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Morningstar, Inc. - Common Stock (MORN) [ST]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ MSA Safety Incorporated Common Stock (MSA) [ST]	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family	DC	\$15,001 - \$50,000	Dividends	None	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Paychex, Inc. - Common Stock (PAYX) [ST]					\$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Pool Corporation - Common Stock (POOL) [ST]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ PTC Inc. - Common Stock (PTC) [ST]	DC	\$1,001 - \$15,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Revvity, Inc. Common Stock (RVTY) [ST] DESCRIPTION: F/K/A PerkinElmer, Inc.	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Rollins, Inc. Common Stock (ROL) [ST]	DC	\$15,001 - \$50,000	Capital Gains	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Service Corporation International Common Stock (SCI) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Signet Jewelers Limited Common Shares (SIG) [ST]	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ STERIS plc (STE) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Tempur Sealy International, Inc. Common Stock (TPX) [ST]	DC	\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family	DC	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ The Duckhorn Portfolio, Inc. Common Stock (NAPA) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ The Middleby Corporation - Common Stock (MIDD) [ST]	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Toro Company (TTC) [ST]	DC	\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Tractor Supply Company - Common Stock (TSCO) [ST]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$2,501 - \$5,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Trimble Inc. - Common Stock (TRMB) [ST]	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond [GS]	DC	\$1,000,001 - \$5,000,000	Interest	None	\$15,001 - \$50,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 1/03/2023) [GS]	DC	None	Interest	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 1/12/2023) [GS]	DC	None	Interest	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 2/16/2023) [GS]	DC	None	Interest	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab -	DC	None	Interest	None	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brokerage #1 ⇒ U.S. Treasury bond (Due 2/2/2023) [GS]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 3/23/2023) [GS]	DC	None	Interest	None	\$2,501 - \$5,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 3/9/2023) [GS]	DC	None	Interest	None	\$2,501 - \$5,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Vail Resorts, Inc. Common Stock (MTN) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Westinghouse Air Brake Technologies Corporation Common Stock (WAB) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Anne Arundel Cnty MD; 5%; Due 10/1/2028 [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore Cnty MD Consol Public Impt 5%; Due 3/1/2027 [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore, MD Revenue Wastewater Series B [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Brunswick, MD, bond [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family	DC	\$15,001 - \$50,000	Interest	None	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Connecticut St Health & Educational Ser-L [GS]					\$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Illinois State, bond [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Indianapolis, IN Local Public, bond [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Department of Transportation - 5%; Due 12/1/2028 [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Health & Higher Educational [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State, bond [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Montgomery County, MD, bond [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Pennsylvania St Turnpike Ser A; 4%; Due 12/1/2028 [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family	DC	\$15,001 - \$50,000	Interest	None	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond; 4%; Due 7/1/2032 [GS]					\$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Providence, RI, bond [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ University Systems of Maryland Auxiliary [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Washington, MD Suburban Sanitary District [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Worcester County, MD, bond [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Acacia Partners, LP [HE]	DC	Spouse/DC Over \$1,000,000	Partnership Income	None	\$100,001 - \$1,000,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Alliance Partners Holdings, LLC [OL]	DC	\$250,001 - \$500,000	None		
LOCATION: Chevy Chase, MD, US DESCRIPTION: Banking					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ American Steadfast, LP [HE]	DC	Spouse/DC Over \$1,000,000	Partnership Income	None	\$100,001 - \$1,000,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab Bank [BA]	DC	\$250,001 - \$500,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Demand loan to family member [DO]	DC	\$250,001 - \$500,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Enlightenment Capital Solutions Fund II, LP [HE] DESCRIPTION: private equity in buyout growth	DC	\$15,001 - \$50,000	Partnership Income	None	\$100,001 - \$1,000,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Enlightenment Capital Solutions Fund III, LP [HE] DESCRIPTION: private equity in buyout growth	DC	\$100,001 - \$250,000	Partnership Income	None	\$50,001 - \$100,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Enlightenment Capital Solutions Fund IV, LP [HE] DESCRIPTION: pooled investment fund	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Forbright, Inc. [PS] DESCRIPTION: Bank stock	DC	\$100,001 - \$250,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Galvanize Innovation & Expansion Fund I, LP (HCP SPV) [OT] DESCRIPTION: private equity	DC	\$100,001 - \$250,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ GPC Partners Co-Investment (Chico), LP [OT] DESCRIPTION: pooled investment fund	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ HCP Private Equity Fund IX, LP [OT] DESCRIPTION: private equity	DC	\$250,001 - \$500,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ HCP Private Equity Fund VII, LP [OT] DESCRIPTION: private equity	DC	\$250,001 - \$500,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ HCP Private Equity Fund VIII, LP [OT] DESCRIPTION: private equity	Spouse/DC Over \$1,000,000		None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Healthpoint Capital Partners II, LP [HE]	DC	\$1,001 - \$15,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Hellman & Friedman Capital Partners IX, LP [OT] DESCRIPTION: private equity	DC	\$1,000,001 - \$5,000,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Mulberry Street [OT] DESCRIPTION: Mutual Fund	DC	Spouse/DC Over \$1,000,000	Dividends	None	\$100,001 - \$1,000,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Oakmark International Fund Investor Class (OAKIX) [MF]	DC	\$500,001 - \$1,000,000	Dividends	None	\$50,001 - \$100,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Ponderosa Ventures Fund I [OT] DESCRIPTION: private equity	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Revolution Growth GP IV, LP [OT] DESCRIPTION: venture capital fund	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Money Market [BA]	DC	\$100,001 - \$250,000	Interest	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Zephyr AI [PS] DESCRIPTION: high-growth healthcare technology company	DC	\$100,001 - \$250,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Bio-Techne Corp - Common Stock (TECH) [ST]	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒	DC	\$50,001 - \$100,000	Dividends	None	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brown & Brown, Inc. Common Stock (BRO) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒	DC	\$50,001 - \$100,000	Capital Gains	None	\$5,001 - \$15,000
Ceridian HCM Holding Inc. (CDAY) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒	DC	\$15,001 - \$50,000	None		
Clean Harbors, Inc. Common Stock (CLH) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒	DC	\$15,001 - \$50,000	Capital Gains	None	\$201 - \$1,000
Core & Main, Inc. Class A Common Stock (CNM) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒	DC	\$15,001 - \$50,000	Capital Gains	None	\$201 - \$1,000
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒	DC	\$1,001 - \$15,000	None		
ITT Inc. Common Stock (ITT) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒	DC	\$15,001 - \$50,000	Capital Gains	None	\$1,001 - \$2,500
Live Nation Entertainment, Inc. Common Stock (LYV) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒	DC	\$50,001 - \$100,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
Martin Marietta Materials, Inc. Common Stock (MLM) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒	DC	\$50,001 - \$100,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Morningstar, Inc. - Common Stock (MORN) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒	DC	\$15,001 - \$50,000	None		
MSA Safety Incorporated Common Stock (MSA) [ST]					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Paychex, Inc. - Common Stock (PAYX) [ST]	DC	\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Pool Corporation - Common Stock (POOL) [ST]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ PTC Inc. - Common Stock (PTC) [ST]	DC	\$1,001 - \$15,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Revvity, Inc. Common Stock (RVTY) [ST] DESCRIPTION: F/K/A PerkinElmer, Inc.	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Rollins, Inc. Common Stock (ROL) [ST]	DC	\$15,001 - \$50,000	Capital Gains	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Service Corporation International Common Stock (SCI) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Signet Jewelers Limited Common Shares (SIG) [ST]	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ STERIS plc (STE) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Tempur Sealy International, Inc. Common Stock (TPX) [ST]	DC	\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ The Duckhorn Portfolio, Inc. Common Stock (NAPA) [ST]	DC	\$1,001 - \$15,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ The Middleby Corporation - Common Stock (MIDD) [ST]	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Toro Company (TTC) [ST]	DC	\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Tractor Supply Company - Common Stock (TSCO) [ST]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$2,501 - \$5,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Trimble Inc. - Common Stock (TRMB) [ST]	DC	\$15,001 - \$50,000	None		
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond [GS]	DC	\$1,000,001 - \$5,000,000	Interest	None	\$15,001 - \$50,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 1/03/2023) [GS]	DC	None	Interest	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 1/12/2023) [GS]	DC	None	Interest	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 2/16/2023) [GS]	DC	None	Interest	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family	DC	None	Interest	None	\$1,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 2/2/2023) [GS]					\$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 3/23/2023) [GS]	DC	None	Interest	None	\$2,501 - \$5,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 3/9/2023) [GS]	DC	None	Interest	None	\$2,501 - \$5,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Vail Resorts, Inc. Common Stock (MTN) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Westinghouse Air Brake Technologies Corporation Common Stock (WAB) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Anne Arundel Cnty MD; 5%; Due 10/1/2028 [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore Cnty MD Consol Public Impt 5%; Due 3/1/2027 [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore, MD Revenue Wastewater Series B [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Brunswick, MD, bond [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Connecticut St Health & Educational Ser-L [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Illinois State, bond [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Indianapolis, IN Local Public, bond [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Department of Transportation 5%; Due 12/1/2028 [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Health & Higher Educational [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State, bond [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Montgomery County, MD, bond [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Pennsylvania St Turnpike Ser A; 4%; Due 12/1/2028 [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond; 4%; Due 7/1/2032 [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Providence, RI, bond [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ University Systems of Maryland Auxiliary [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Washington, MD Suburban Sanitary District [GS]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Worcester County, MD, bond [GS]	DC	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
TLM Trust ⇒ Wells Fargo - Checking [BA]		\$15,001 - \$50,000	None		
WB Trust ⇒ Wells Fargo - Checking [BA]	DC	\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
Wells Fargo - Brokerage #1 ⇒ Allspring 100% Treasury Money Market [BA]	JT	\$5,000,001 - \$25,000,000	Interest	None	\$100,001 - \$1,000,000
Wells Fargo - Brokerage #1 ⇒ Anne Arundel County, MD Special Obligation - Refunding National Business Park [GS]	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
DESCRIPTION: DTD 06/07/18 5.00% 07/01/2025					
Wells Fargo - Brokerage #1 ⇒ BALTIMORE MD PROJ REVENUE SUB-WST WTR PROJ-SER A [GS]	JT	\$100,001 - \$250,000	Interest	None	\$2,501 - \$5,000
DESCRIPTION: DTD 02/09/17 5.00% 07/01/2025					
Wells Fargo - Brokerage #1 ⇒	JT	\$100,001 -	Interest	None	\$2,501 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Black Belt Energy Gas Dist AL Ser D1 [GS] DESCRIPTION: DTD 7/1/22; Due 7/1/2052		\$250,000			\$5,000
Wells Fargo - Brokerage #1 ⇒ Cecil County, MD, bond [GS] DESCRIPTION: DTD 12/14/17 5.00% 08/01/2028	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
Wells Fargo - Brokerage #1 ⇒ Charles County, MD, bond [GS] DESCRIPTION: DTD 09/30/14 5.00% 10/01/2024	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
Wells Fargo - Brokerage #1 ⇒ Howard County, MD, bond [GS] DESCRIPTION: DTD 03/30/16 5.00% 02/15/2024	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
Wells Fargo - Brokerage #1 ⇒ JEA FL WTR & SWR REVENUE VAR-SER A-2 [GS] DESCRIPTION: DTD 12/28/10; Due 10/01/2042	JT	None	Interest	None	\$201 - \$1,000
Wells Fargo - Brokerage #1 ⇒ Johnson & Miami County, bond [GS] DESCRIPTION: DTD 03/01/21 1.28% 09/01/2028	JT	\$100,001 - \$250,000	Interest	None	\$1,001 - \$2,500
Wells Fargo - Brokerage #1 ⇒ Kaufman County, TX, bond [GS] DESCRIPTION: DTD 09/01/16 4.00% 02/15/2026	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
Wells Fargo - Brokerage #1 ⇒ Kentucky Cnty TX Road, bond [GS] DESCRIPTION: DTD 02/08/17 5.00% 04/01/2031	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
Wells Fargo - Brokerage #1 ⇒ Manhattan KS Ref- Ser-A [GS] DESCRIPTION: DTD 06/05/23 5.00% 11/01/2026	JT	\$50,001 - \$100,000	Interest	None	\$2,501 - \$5,000
Wells Fargo - Brokerage #1 ⇒ Maryland St First Series [GS] DESCRIPTION: DTD 06/22/16 4.00% 06/01/2030	JT	\$50,001 - \$100,000	Interest	None	\$1,001 - \$2,500
Wells Fargo - Brokerage #1 ⇒ Maryland St Stadium Auth Revenue Ser A [GS] DESCRIPTION: DTD 07/06/23 5.00% 03/01/2032	JT	\$100,001 - \$250,000	Interest	None	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo - Brokerage #1 ⇒ Maryland State Department of Transportation [GS]	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
DESCRIPTION: DTD 10/22/20 5.00% 10/01/2025					
Wells Fargo - Brokerage #1 ⇒ Maryland State Health & Higher Educational - Ref-Peninsula Regional Health [GS]	JT	\$100,001 - \$250,000	Interest	None	\$2,501 - \$5,000
DESCRIPTION: DTD 05/13/20 5.00% 07/01/2029					
Wells Fargo - Brokerage #1 ⇒ Montgomery County, MD Ref-Ser B [GS]	JT	\$100,001 - \$250,000	Interest	None	\$2,501 - \$5,000
DESCRIPTION: DTD 08/05/20 4.00% 11/01/2024					
Wells Fargo - Brokerage #1 ⇒ New Jersey Educational Fac Aut Rev Ser A [GS]	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
DESCRIPTION: DTD 04/05/22 5.00% 07/01/2029					
Wells Fargo - Brokerage #1 ⇒ Prince George's County, MD Cops Hampton Park [GS]	JT	\$100,001 - \$250,000	Interest	None	\$2,501 - \$5,000
DESCRIPTION: DTD 06/06/19 5.00% 10/01/2028					
Wells Fargo - Brokerage #1 ⇒ University System of Maryland Auxiliary Facility and Tuition Rev bond [GS]	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
DESCRIPTION: DTD 02/24/21 5.00% 04/01/2030					
Wells Fargo - Brokerage #1 ⇒ Vanguard Limited-Term Tax-Exempt Fund (VMLUX) [MF]	JT	\$15,001 - \$50,000	None		
Wells Fargo - Brokerage #1 ⇒ Washington MD Suburban San Dis Cons Public Impt [GS]	JT	\$100,001 - \$250,000	Interest	None	\$2,501 - \$5,000
DESCRIPTION: DTD 04/29/14 4.00% 06/01/2039					
Wells Fargo - Brokerage #1 ⇒ Washington State Health Care Facilities, bond [GS]	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
DESCRIPTION: DTD 08/21/19 5.00% 08/01/2026					
Wells Fargo - Brokerage #1 ⇒ Washington Suburban Sanitary District, MD, [GS]	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
DESCRIPTION: DTD 12/02/14 4.00% 06/01/2025					
Wells Fargo - Brokerage #1 ⇒ Wicomico County, MD, bond [GS]	JT	\$100,001 - \$250,000	Interest	None	\$2,501 - \$5,000
DESCRIPTION: DTD 11/03/15 5.00% 11/01/2024					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo - Brokerage #1 ⇒ Worcester Cnty MD Consol Public Impt [GS]	JT	\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
DESCRIPTION: DTD 04/16/19 5.00% 08/01/2029					
Wells Fargo - Brokerage #2 ⇒ Indiabulls Real Estate Ltd Sponsored GDR Reg S (real estate) [OT]	JT	\$15,001 - \$50,000	None		
DESCRIPTION: ADR stock					
Wells Fargo - Checking [BA]	JT	\$500,001 - \$1,000,000	Interest	None	\$201 - \$1,000
Wells Fargo - Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Virtus Tactical AllocationFund Class A (NAINX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Wells Fargo - Cash [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Wells Fargo Money Market Fund Class A Shares (STGXX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Money Market					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Forbright, Inc.	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Family Investments LLC - Family Trust	2011	Investment Loan	\$1,000,001 - \$5,000,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	St. Simons Bank & Trust	2021	Mortgage (investment/rental property)	\$1,000,001 - \$5,000,000
	Wells Fargo	December 2023	Portfolio Loan	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Washington Director & Board Member	Common Sense Media
COMMENTS: Resigned January 2022	
Member	Delaney Charitable Foundation
Investment Manager	AMD 09 LLC
Managing Member	The Ideas Network, LLC
Member	Northwestern University Board of Trustees
Managing Member	East Capitol Venture, LLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- 2015 Insurance Trust
- Allstate, variable annuity (Owner: JT)
- AMD 09 LLC
LOCATION: US
- Cloister Cottage Venture, LLC (50% Interest) (Owner: SP)
LOCATION: US
- Cloister Cottage Venture, LLC (50% Interest)
LOCATION: US
- DC Insurance Trust (Owner: DC)
- DC Insurance Trust ⇒ Pacific Life (Owner: DC)
- East Capitol Venture, LLC
LOCATION: US

- EVR Investment, LLC (Owner: SP)
LOCATION: US
- J.P. Morgan - Brokerage (Owner: SP)
- JKD o9 LLC (Owner: SP)
LOCATION: US
- Mazara, LLC (Owner: SP)
LOCATION: US
- Parkglen, LLC (Owner: DC)
LOCATION: US
- Parkglen, LLC (Owner: DC)
LOCATION: US
- SBLG Family Investments, LLC (Owner: DC)
LOCATION: US
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 (25% Interest) (Owner: DC)
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 (Owner: DC)
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 (Owner: DC)
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 (25% Interest) (Owner: DC)
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 (Owner: DC)
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 (Owner: DC)
- TLM Trust
- WB Trust (Owner: DC)
- Wells Fargo - Brokerage #1 (Owner: JT)
- Wells Fargo - Brokerage #2 (Owner: JT)
- Wells Fargo - Roth IRA
- Wells Fargo - Roth IRA (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: April McClain Delaney , 02/22/2024