



Filing ID #10060996

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Rebecca 'Becca' Balint
Status: Member
State/District: VT00

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2022
Filing Date: 05/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Balint & Wohl- Joint WROS ⇒ Adobe Inc. - Common Stock (ADBE) [ST]	JT	None	Capital Gains	Not Applicable	\$15,001 - \$50,000
Balint & Wohl- Joint WROS ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	JT	None	Capital Gains	Not Applicable	\$5,001 - \$15,000
Balint & Wohl- Joint WROS ⇒ Boston Trust Midcap Fund (BTMFX) [MF]	JT	\$1,001 - \$15,000	None		
Balint & Wohl- Joint WROS ⇒ Calvert Conservative Allocation Fund Class I (CFAIX) [MF]	JT	\$1,001 - \$15,000	None		
Balint & Wohl- Joint WROS ⇒ Calvert Emerging Markets Equity Fund Class I (CVMIX) [MF]	JT	\$1,001 - \$15,000	None		
Balint & Wohl- Joint WROS ⇒ Calvert Flexible Bond Fund Class I (CUBIX) [MF]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Balint & Wohl- Joint WROS ⇒ Calvert Short Duration Income Fund Class I (CDSIX)	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[MF]					
Balint & Wohl- Joint WROS ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	JT	\$1,001 - \$15,000	None		
Balint & Wohl- Joint WROS ⇒ Cintas Corporation - Common Stock (CTAS) [ST]	JT	None	Capital Gains	Not Applicable	\$5,001 - \$15,000
Balint & Wohl- Joint WROS ⇒ Ecofin Global Renewables Infrastructure Fund Institutional Class (ECOIX) [MF]	JT	\$1,001 - \$15,000	None		
Balint & Wohl- Joint WROS ⇒ Fidelity Money Market Fund: Premium Class (FZDXX) [MF]	JT	\$15,001 - \$50,000	None		
Balint & Wohl- Joint WROS ⇒ Impax Global Environmental Markets Fund Investor Class (PGRNX) [MF]	JT	None	Capital Gains	Not Applicable	\$1,001 - \$2,500
Balint & Wohl- Joint WROS ⇒ Impax Sustainable Allocation Fund Investor Class (PAXWX) [MF]	JT	None	Capital Gains	Not Applicable	\$1,001 - \$2,500
Balint & Wohl- Joint WROS ⇒ Intuit Inc. - Common Stock (INTU) [ST]	JT	None	Capital Gains	Not Applicable	\$15,001 - \$50,000
Balint & Wohl- Joint WROS ⇒ Invesco Floating Rate ESG Fund Class Y (AFRYX) [MF]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Balint & Wohl- Joint WROS ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	\$1,001 - \$15,000	None		
Balint & Wohl- Joint WROS ⇒ iShares USD Green Bond ETF (BGRN) [EF]	JT	\$1,001 - \$15,000	None		
Balint & Wohl- Joint WROS ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]	JT	None	Capital Gains	Not Applicable	\$5,001 - \$15,000
Balint & Wohl- Joint WROS ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Balint & Wohl- Joint WROS ⇒ PayPal Holdings, Inc. - Common Stock (PYPL) [ST]	JT	None	Capital Gains	Not Applicable	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Balint & Wohl- Joint WROS ⇒ Praxis Value Index Fund, Class A Shares (MVIAX) [MF]	JT	\$1,001 - \$15,000	None		
Balint & Wohl- Joint WROS ⇒ TCW New America Premier Equities Fund - N Class (TGUNX) [MF]	JT	\$1,001 - \$15,000	None		
Balint & Wohl- Joint WROS ⇒ Trillium ESG Global Equity Fund Investor (PORTX) [MF]	JT	\$1,001 - \$15,000	None		
Brattleboro Savings & Loan [BA]	JT	\$1,001 - \$15,000	None		
DC 1 Education Trust ⇒ American Beach Small Cap Val R5 (AVFIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ Baron Emerging Markets Fund Instl (BEXIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ Eaton Vance Income Fund of Boston Cl I (EIBIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ Fidelity Advisor Total Bond Cl Z (FBKWX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ John Hancock Disciplined Value I (JVLIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ JPMorgan Core Bond Class I (WOBDX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ MFS Growth Fund Class I (MFEIX) [MF]	DC	\$1,001 - \$15,000	None		
DC 1 Education Trust ⇒ MFS Mid Cap Value Fund - Class I (MCVIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ T Rowe Price Overseas Stock I CL (TROIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ Touchstone Mid Cap Growth CL Y (TEGYX) [MF]	DC	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DC 1 Education Trust ⇒ Victory Trivalent Intl Small Cap I (MISIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ Wasatch Small Cap Growth Fund Instl CL (WIAEX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ American Beach Small Cap Val R5 (AVFIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ Baron Emerging Markets Fund Instl (BEXIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ Eaton Vance Income Fund of Boston Cl I (EIBIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ Fidelity Advisor Total Bond Cl Z (FBKWX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ John Hancock Disciplined Value I (JVLIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ JPMorgan Core Bond Class I (WOBDX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ MFS Growth Fund Class I (MFEIX) [MF]	DC	\$1,001 - \$15,000	None		
DC 2 Education Trust ⇒ MFS Mid Cap Value Fund CL I (MCVIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ T Rowe Price Overseas Stock I CL (TROIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ Touchstone Mid Cap Growth CL Y (TEGYX) [MF]	DC	\$1,001 - \$15,000	None		
DC 2 Education Trust ⇒ Victory Trivalent Intl Small Cap I (MISIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ Wasatch Small Cap Growth Fund Instl CL (WIAEX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Elizabeth Wohl IRA ⇒ Boston Trust Midcap Fund (BTMFXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Calvert Conservative Allocation Class I (CFAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Calvert Emerging Markets Equity CL I (CVMIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Calvert Flexible Bond CL i (CUBIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Calvert Short Duration Inc FD I (CDSIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Calvert Small Cap CL I (CSVIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Ecofin Global Renewables Infra Ins (ECOIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Fidelity MMKT Premium Class [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Invesco Floating Rate Esg CL Y (AFRYX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Ishares TR ESG AW MSCI EAFE (ESGD) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ IShares TR USD GRN Bond ETF (BGRN) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Parnassus Core Equity Investor (PRBLX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Praxis Value Index Class A (MVIAX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ TCW New Americas Premium Equities N (TGUNX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Elizabeth Wohl IRA ⇒ Trillium Esg Global Equity Fund Retail (PORTX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Boston Trust Walden Small Cap Fund (BOSOX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Brown Advisory Sustain Growth Inst (BAFWX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Calvert Green Bond Class I (CGBIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Calvert US Lrg Cap Val Respons Index I (CFJIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Hartford Schroder Emerg Mkts Eq Cl Y (HHHYX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Impax High Yield Bond Institl Cl (PXHIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ IShares TR Esg Aw MSCI EAFE (ESGD) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Parnassus Core Equity Instl (PRILX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Parnassus Mid Cap FD Institutional (PFPMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ PIMCO Low Duration Esg Fund Instl (PLDIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ TIAA-CREF Core Impact Bond Instl (TSBIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Inc. 401k ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity Global Ex US Index Fund (FSGGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rebecca Balint IRA ⇒ Fidelity Large Cap Growth Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity Large Cap Value Index Fund (FLCOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity Small Cap Index Fund (FSSNX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity US Bond Index Fund (FXNAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Boston Trust Walden Small Cap Fund (BOSOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Brown Advisory Sustain Growth Inst (BAFWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Calvert Green Bond Class I (CGBIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Calvert US Lrg Cap Val Respons Index I (CFJIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Hartford Schroder Emerg Mkts Eq Cl Y (HHHYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Impax High Yield Bond Institl Cl (PXHIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ iShares TR ESG Aw Msci EAFE (ESGD) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Parnassus Core Equality Instl (PRILX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Parnassus Mid Cap Fd Institutional (PFPMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Pimco Low Duration Esg Fund Instl (PLDIX) [MF]					
Rebecca Balint Roth IRA ⇒ TIAA-CREF Core Impact Bond Instl (TSBIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
The Girl in the Yellow Pantsuit: Essays on Politics, History, and Culture [IP]		Undetermined	None		
Vermont State Teachers Pension [PE]		\$15,001 - \$50,000	Tax-Deferred		
VHEIP 529 Plan ⇒ Age 12-13 [5F] LOCATION: VT	SP	\$15,001 - \$50,000	Tax-Deferred		
VHEIP 529 Plan ⇒ Age 16 [5F] LOCATION: VT	SP	\$15,001 - \$50,000	Tax-Deferred		

* 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
Downs Rachlin Martin PLLC	Spouse Salary	N/A	N/A
State of Vermont	Salary	N/A	\$45,480.46

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2019	Vermont State Teachers' Retirement System	Defined benefit plan that provides service retirement benefits.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Balint & Wohl- Joint WROS (Owner: JT)
LOCATION: US
- DC 1 Education Trust (Owner: DC)
- DC 2 Education Trust (Owner: DC)
- Elizabeth Wohl IRA (Owner: SP)
- Elizabeth Wohl Roth IRA (Owner: SP)
- Fidelity Inc. 401k (Owner: SP)
- Rebecca Balint IRA
- Rebecca Balint Roth IRA
- VHEIP 529 Plan (Owner: SP)
LOCATION: VT
DESCRIPTION: DC1
- VHEIP 529 Plan (Owner: SP)
LOCATION: VT
DESCRIPTION: DC2

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

COMMENTS

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. Rebecca 'Becca' Balint , 05/15/2024