



Filing ID #10052071

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 08/13/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
401 (a) Virginia Cash Match Plan ⇒ Target Date 2025 Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
401 (a) Virginia Cash Match Plan ⇒ US Stock Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
457 Virginia Deferred Compensation Plan ⇒ Target Date 2025 Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
457 Virginia Deferred Compensation Plan ⇒ US Stock Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
AB Global Bond Fund (ANAYX) [MF]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Abbott Laboratories (ABT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
AbbVie Inc. (ABBV) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Accenture plc Class A Ordinary Shares (ACN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
American Express Company (AXP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<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"/>
Baxter International Inc. (BAX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Blue Ridge Bank Money Market Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
BrightHouse Whole Life [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
BrightHouse Whole Life [WU]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Broadcom Inc. (AVGO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
C&F Bank Accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab Corporation (SCHW) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Chevron Corporation (CVX) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<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"/>
Comcast Corporation - Class A (CMCSA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Costco Wholesale Corporation (COST) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Crown Castle Inc. (CCI) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dollar General Corporation (DG) [ST]		\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Dominion Energy, Inc. (D) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Elevance Health, Inc. (ELV) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity National Information Services, Inc. (FIS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
First Eagle Overseas Fund (SGOIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Hartford Financial Services Group, Inc. (HIG) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Honeywell International Inc. (HON) [ST]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
International Flavors & Fragrances, Inc. (IFF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
iShares Biotechnology ETF (IBB) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares MSCI USA Min Vol Factor ETF (USMV) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares Russell 1000 ETF (IWB) [EF]		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
ITT Inc. (ITT) [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"/>
Kimberly-Clark Corporation (KMB) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Linde plc Ordinary Share (LIN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Lockheed Martin Corporation (LMT) [ST]		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Lowe's Companies, Inc. (LOW) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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"/>
Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
McDonald's Corporation (MCD) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Metropolitan West Total Return Bond Fund Class I (MWTIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mondelez International, Inc. - Class A (MDLZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Bank (Brokerage sweep) [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ AbbVie Inc. (ABBV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Apple Inc. (AAPL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ BlackRock Strategic Income Opportunities Portfolio (BSIIX) [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 ⇒ Caterpillar, Inc. (CAT) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Energy Select Sector SPDR Fund (XLE) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ EOG Resources, Inc. (EOG) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Rising Dividend Achievers ETF (RDVY) [EF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Value Line Dividend Index Fund (FVD) [EF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Franklin FTSE Japan ETF (FLJP) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Global X MSCI Norway ETF (NORW) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Goldman Sachs ActiveBeta U.S. Large Cap Equity ETF (GSLC) [MF]		\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Guggenheim Macro Opportunities Fund Institutional Class (GIOIX) [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Harding Loevner International Equity Portfolio (HLMIX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Hartford Financial Services Group, Inc. (HIG) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco KBW Bank ETF (KBWB) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco QQQ Trust (QQQ) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares 0-5 Year High Yield Corporate Bond ETF (SHYG) [EF]		\$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 10+ Year Investment Grade Corporate Bond ETF (IGLB) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares Latin America 40 ETF (ILF) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares U.S. Financial Services ETF (IYG) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares U.S. Technology ETF (IYW) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ JPMorgan BetaBuilders Canada ETF (BBCA) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]		\$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 ⇒ JPMorgan Nasdaq Equity Premium Income ETF (JEPQ) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Kinder Morgan, Inc. (KMI) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Lowe's Companies, Inc. (LOW) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Meta Platforms, Inc. - Class A (FB) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Nationwide Geneva Small Cap Growth Fund (NWKDX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Neuberger Berman Intrinsic Value Fund (NINLX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ PGIM Jennison Global Opportunities Fund (PRJZX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ PIMCO Income Fund (PONPX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Principal MidCap Fund (PCBIX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ ProLogis, Inc. (PLD) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Bloomberg Short Term High Yield Bond ETF (SJNK) [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ T. Rowe Price Blue Chip Growth Fund (TRBCX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
UnitedHealth Group Incorporated Common Stock (UNH) [ST]					<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Walmart Inc. (WMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ WisdomTree International Hedged Quality Dividend Growth Fund (IHDG) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley IRA ⇒ Equitable Financial Retirement Cornerstone 17 Seri [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Motorola Solutions, Inc. (MSI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
National Western Life Annuity [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: This is a 403b TSA					
Nationwide Geneva Small Cap Growth Fund (NWKDX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Neuberger Berman Intrinsic Value Fund (NINLX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Packaging Corporation of America (PKG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Pepsico, Inc. (PEP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Philip Morris International Inc (PM) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input 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]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Principal MidCap Fund (PCBIX) [MF]		\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Principal Spectrum Preferred and Capital Securities Income Fund (PPSIX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ProLogis, Inc. (PLD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Rental House - Nags Head, NC [RP]	JT	\$1,000,001 - \$5,000,000	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					
Royal Gold, Inc. (RGLD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SPDR S&P 500 ETF Trust (SPY) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Texas Instruments Incorporated (TXN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TJX Companies, Inc. (TJX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Trane Technologies plc (TT) [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 Total Bond Market Index Fund (BND) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Vanguard Total International Bond Index Fund (BNDX) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Virginia Retirement System [PE]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Virginia Retirement System [PE]	SP	\$100,001 - \$250,000	Distribution	\$15,001 - \$50,000	<input type="checkbox"/>
Virtus Vontobel Foreign Opportunities Fund I (JVXIX)		\$15,001 - \$50,000	Capital Gains,	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
[MF]			Dividends		
Visa Inc. (V) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Walmart Inc. (WMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
WEC Energy Group, Inc. (WEC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<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?
Abbott Laboratories (ABT) [ST]		04/19/2022	P	\$1,001 - \$15,000	
Accenture plc Class A Ordinary Shares (ACN) [ST]		10/8/2022	P	\$1,001 - \$15,000	
Duke Realty Corporation (DRE) [ST]	JT	05/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ishares Russell 1000 ETF [AB]		04/19/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: ETF					
Mastercard Incorporated (MA) [ST]		12/7/2022	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ AB Global Bond Adv [CS]		12/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: (JT) Mutual fund					
Morgan Stanley ⇒ Abbott Laboratories (ABT) [ST]		03/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Abbott Laboratories (ABT) [ST]		06/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Abbott Laboratories (ABT) [ST]		07/15/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley ⇒ Amazon.com, Inc. (AMZN) [ST]		11/18/2022	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Baxter International Inc. (BAX) [ST]		06/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Baxter International Inc. (BAX) [ST]		07/15/2022	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Comcast Corporation - Class A (CMCSA) [ST]		12/7/2022	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Comcast Corporation - Class A (CMCSA) [ST]		09/15/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Dollar General Corporation (DG) [ST]		12/21/2022	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Honeywell International Inc. (HON) [ST]		01/14/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ International Flavors & Fragrances, Inc. (IFF) [ST]		09/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ iShares 0-5 Year High Yield Corporate Bond ETF (SHYG) [ST]		03/8/2022	P	\$1,001 - \$15,000	
DESCRIPTION: ETF					
Morgan Stanley ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [ST]		03/29/2022	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ iShares Russell 1000 ETF (IWB) [ST]		03/15/2022	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ iShares Russell 1000 ETF (IWB) [ST]		06/16/2022	P	\$1,001 - \$15,000	
DESCRIPTION: ETF					
Morgan Stanley ⇒ Lockheed Martin Corporation (LMT) [ST]		01/14/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒		02/28/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Mastercard Incorporated (MA) [ST]					
Morgan Stanley ⇒ Mastercard Incorporated (MA) [ST]		09/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ McDonald's Corporation (MCD) [ST]		12/21/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		02/28/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Metropolitan West Tot Ret Bd I [OT]		12/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: Mutual fund					
Morgan Stanley ⇒ MSIF Growth I [OT]		11/18/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: Mutual Fund					
Morgan Stanley ⇒ SPDR S&P 500 (SPY) [ST]		01/05/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ SPDR S&P 500 (SPY) [ST]		01/14/2022	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ SPDR S&P 500 (SPY) [ST]		03/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ SPDR S&P 500 (SPY) [ST]		06/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ SPDR S&P 500 ETF Trust [OT]		09/15/2022	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: ETF					
Morgan Stanley ⇒ TJX Companies, Inc. (TJX) [ST]		03/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ TJX Companies, Inc. (TJX) [ST]		06/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley ⇒ Vanguard Total Bond Index Fund [CS]		03/8/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Corporarte bond index fund					
Morgan Stanley ⇒ Vanguard Total Bond Market ETF [OT]		12/14/2022	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley ⇒ Vanguard Total Bond Market ETF [OT]		12/21/2022	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley ⇒ Vanguard Total Inl Bond ETF [OT]		12/21/2022	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley ⇒ Vanguard Total Intl Bond ETF [OT]		12/14/2022	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: Mutual fund					
Morgan Stanley ⇒ Virtus Vontobel Foreign Opp [OT]		08/30/2022	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: Mutual Fund					
Morgan Stanley ⇒ Walmart Inc. (WMT) [ST]		06/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Walmart Inc. (WMT) [ST]		07/15/2022	P	\$1,001 - \$15,000	
Morgan Stanley (JT) ⇒ iShares o-5 HY Corp [MF]		12/12/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley (JT) ⇒ Mastercard Incorporated (MA) [ST]		02/28/2022	P	\$1,001 - \$15,000	
Morgan Stanley (JT) ⇒ Piedmont Office Realty Trust, Inc. Class A (PDM) [ST]		02/27/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley (JT) ⇒ Principal Spectrum Preferred and Capital Securities Income Fund I [MF]		01/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ AbbVie Inc. (ABBV) [ST]		06/16/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		08/10/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		06/16/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		08/10/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Apple Inc. (AAPL) [ST]		01/28/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Apple Inc. (AAPL) [ST]		11/17/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Caterpillar, Inc. (CAT) [ST]		03/29/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Energy Sel Sect SPDR FD [OT]		09/27/2022	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: Mutual Fund					
Morgan Stanley INH IRA ⇒ First Trust TCW Opportunistic Fixed Income ETF (FIXD) [ST]		06/16/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Franklin FTSE Japan ETF [OT]		11/17/2022	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ Franklin FTSE UK ETF [OT]		09/27/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: ETF					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ Franklin FTSE United Kingdom ETF (FLGB) [ST]		01/28/2022	P	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ General Electric Company (GE) [ST]		03/29/2022	P	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ General Electric Company (GE) [ST]		06/16/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [ST]		06/16/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Global X MSCI Norway ETF (NORW) [EF]		02/25/2022	P	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Global X U.S. Infrastructure Development ETF (PAVE) [EF]		09/27/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Goldman Activebeta US LC ETF [OT]		08/16/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ Goldman Sachs ActiveBeta U.S. Large Cap Equity ETF (GSLC) [EF]		06/16/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Hartford Financial Services Group, Inc. (HIG) [ST]		03/29/2022	P	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco KBW Bank ETF [OT]		11/17/2022	P	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ Invesco QQQ Trust Series 1 [OT]		11/17/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
LOCATION: US					
DESCRIPTION: Mutual Fund					
Morgan Stanley INH IRA ⇒ Invesco S&P 500 Equal Weight ETF [EF]		12/22/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ Invesco S&P 500 High Beta ETF (SPHB) [ST]		01/28/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ ISHA Curr Hedged MSCI EAFE [AB]		05/10/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Mutual Fund					
Morgan Stanley INH IRA ⇒ Ishares o-5 HY Corp [AB]		05/10/2022	P	\$1,001 - \$15,000	
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ iShares o-5 Year High Yield Corporate Bond ETF (SHYG) [ST]		06/16/2022	P	\$1,001 - \$15,000	
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ iShares o-5 Year High Yield Corporate Bond ETF (SHYG) [EF]		07/13/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Mutual Fund					
Morgan Stanley INH IRA ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [ST]		06/16/2022	P	\$1,001 - \$15,000	
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF]		07/13/2022	P	\$1,001 - \$15,000	
DESCRIPTION: EFT					
Morgan Stanley INH IRA ⇒ Ishares 20+yr Treasu Bond ETF [OT]		11/17/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: EFT					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ Ishares Core MSCI EAFE ETF [AB]		05/10/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ Ishares Core MSCI EAFE ETF [OT]		09/27/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		02/25/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Europe [AB]		05/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares Core MSCI Europe ETF (IEUR) [ST]		01/28/2022	P	\$1,001 - \$15,000	
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ iShares Core MSCI Europe ETF (IEUR) [EF]		02/25/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares Core S&P 500 ETF (IVV) [ST]		06/16/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ iShares Core S&P Small Cap E [OT]		11/17/2022	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: Mutual Fund					
Morgan Stanley INH IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		03/8/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		07/13/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares Latin Amer 40 ETF (ILF) [MF]		11/12/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ iShares Latin America 40 ETF (ILF) [EF]		02/25/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ iShares MSCI EAFE Growth ETF (EFG) [ST]		01/28/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ Ishares MSCI EAFE Grwth EF [AB]		05/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares MSCI EAFE Val ETF [OT]		11/17/2022	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]		07/13/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ iShares Russell 1000 ETF (IWB) [EF]		07/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares S&P 500 EAFE Val ETF [EF]		05/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares S&P 500 Value ETF (IVE) [EF]		07/13/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares U.S. Financial Services ETF (IYG) [EF]		02/25/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares US Technology ETF [OT]		08/10/2022	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: Mutual Fund					
Morgan Stanley INH IRA ⇒ iShares US Technology ETF [OT]		08/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ Ishares US Technology ETF [OT]		11/11/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒		09/27/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ishares US Technology ETF [OT]				(partial)	
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ JPM Nasdaq Equity Premium [OT]		09/27/2022	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: ETF					
Morgan Stanley INH IRA ⇒ JPMorgan Betabuilders Canada [AB]		05/10/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ JPMorgan BetaBuilders Canada ETF (BBCA) [EF]		02/25/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ JPMorgan Equity Premium Inco [AB]		05/10/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]		08/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Kinder Morgan, Inc. Warrants Expiring 2017 (KMI.W) [ST]		03/8/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Meta Platforms, Inc. - Class A (FB) [ST]		01/28/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Microsoft Corporation (MSFT) [ST]		08/10/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Rio Tinto Plc (RIO) [ST]		03/29/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Blackstone Senior Loan [AB]		05/10/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Blackstone Senior Loan [OT]		08/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US					
DESCRIPTION: Mutual Fund					
Morgan Stanley INH IRA ⇒ SPDR Bloomberg Short Term High Yield Bond ETF (SJNK) [EF]		03/8/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ SPDR S&P 500 ETF Trust (SPY) [EF]		07/15/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		01/28/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [MF]		11/4/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Starbucks Corporation (SBUX) [ST]		05/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ TJX Companies, Inc. (TJX) [ST]		07/15/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ VanEck Fallen Angel High Yield Bond ETF (ANGL) [EF]		07/13/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard Intermediate-Term Corporate Bond Index Fund (VCIT) [MF]		03/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard Total Bond Market [AB]		05/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Walmart Inc. (WMT) [ST]		06/16/2022	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Westrock Company (WRK) [ST]		09/27/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Putnam Ultra Sht Dur Inc A [AB]		04/26/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Putnam Ultra Sht Dur Inc A [MF]	JT	01/11/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SPDR S&P 500 ETF Trust [AB]		04/19/2022	P	\$1,001 - \$15,000	
TJX Companies, Inc. (TJX) [ST]		04/19/2022	P	\$1,001 - \$15,000	

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit

<https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Morgan Stanley	Retirement Distribution	\$8,804.87
Morgan Stanley	Spouse Retirement Distribution	N/A
Virginia Retirement System	Spouse Retirement Distribution	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Blue Ridge Bank	November 2018	Real property at Nags Head, NC	\$500,001 - \$1,000,000
JT	Wells Fargo	June 2019	Mortgage on rental - Montross, VA	\$100,001 - \$250,000
JT	Wells Fargo Mortgage	July 2020	Mortgage on residence	\$100,001 - \$250,000
	C&F Bank	December 2022	Credit card	\$10,000 - \$15,000

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

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- 401 (a) Virginia Cash Match Plan
- 457 Virginia Deferred Compensation Plan
- AXA Equitable Life Ins Co (Owner: SP)
- Morgan Stanley
- Morgan Stanley (JT)
LOCATION: US
- Morgan Stanley INH IRA
- Morgan Stanley INH IRA (Owner: SP)
- Morgan Stanley IRA (Owner: SP)

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 , 08/13/2023