



Filing ID #10047147

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Jake Auchincloss
Status: Member
State/District: MA04

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 05/15/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
377 Commonwealth Ave LLC [OL]		\$15,001 - \$50,000	Capital Gains, Partnership Income	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
LOCATION: Boston/Suffolk, MA, US					
DESCRIPTION: Ownership share in LLC holding building of condominiums					
529 DC1 ⇒ American balanced fund-529F1 (CLBAX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC1 ⇒ Capital world growth and income-529F1 (FCWGX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC1 ⇒ Fundamental investors-529F1 (FFXFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC1 ⇒ The New Economy Fund-529F1 (FNEEX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC1 ⇒ Washington Mutual Investors Fund-529F1 (FWMMX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC2 ⇒	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American balanced fund-529F2 (CLBAX) [MF]					
529 DC2 ⇒ EuroPacific Growth Fund-529F2 (FUEPX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC2 ⇒ Fundamental investors-529F2 (FFXFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC2 ⇒ New World Fund-529F2 (NEWFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC2 ⇒ The New Economy Fund-529F2 (FNEEX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC2 ⇒ Washington Mutual Investors Fund-529F2 (FWMMX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bank of America Checking - MG [BA]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
Bank of America Savings - MG [BA]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Flipside Crypto Investor Holdings, LLC ⇒ Flipside Crypto, Inc. [OT]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Investment in software-as-a-service company					
Geraldine Glimcher Excepted Trust [EQ]		Undetermined	None		<input type="checkbox"/>
Newton house [RP]	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Newton, MA, US					
Savings USAA TA [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Ariel Fund (ARAIX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ BlackRock Strategic Municipal Opportunity Fund (MKMTX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Calvert Flexible Bond (CUBIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Calvert Responsible Muni Income (CTTIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SFP/MMLIS Individual Acct - JA ⇒ Calvert Small Cap (CSVIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ First Trust Water (FIW) [EF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Hartford Municipal Opportunities (HHMIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Hartford Schroders International Stock (SCIEX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EAFE (ESGD) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI USA Small Cap (ESGU) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ JPMorgan High Yield Municipal Fund (JTISX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ JPMorgan Short-Intermediate Muni Bond (JIMIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ SPDR MSCI Emerging Markets Fossil Fuel Free ETC (EEMX) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SFP/MMLIS Individual Acct - JA ⇒ SPDR S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Ariel Fund (ARAIX) [MF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ BlackRock Strategic Municipal Opportunity Fund (MKMTX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Calvert Flexible Bond (CUBIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Calvert Responsible Muni Income (CTTIX) [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Calvert Small Cap (CSVIX) [MF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ First Trust Water (FIW) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Hartford Municipal Opportunities (HHMIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Hartford Schroders International Stock (SCIEX) [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ JPMorgan High Yield Municipal Fund (JTISX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JPMorgan Short-Intermediate Muni Bond (JIMIX) [MF]					<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ SPDR MSCI Emerging Markets Fossil Fuel Free ETC (EEMX) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI USA Small Cap ETF (ESML) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESC MSCI USA ETF (ESGU) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESG MSCI EAFE (ESGD) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Ariel Fund (ARAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Calvert Small Cap (CSVIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
First Trust Water (FIW) [EF]					<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Hartford Schroders International Stock (SCIEX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG MSCI USA Small Cap (ESGU) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
USAA Checking - Joint [BA]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
USAA checking & savings [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
USAA Savings - Joint [BA]	JT	\$15,001 - \$50,000	None		<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?
377 Commonwealth Ave LLC [OL] LOCATION: Boston/Suffolk, MA, US DESCRIPTION: Ownership share in LLC holding building of condominiums		04/1/2021	S (partial)	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
529 DC1 ⇒ American balanced fund-529F1 [MF]	DC	12/14/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
529 DC1 ⇒ Capital world growth and income-529F1 (FCWGX) [MF]	DC	12/14/2021	P	\$1,001 - \$15,000	
529 DC1 ⇒ Fundamental investors-529F1 (FFXFX) [MF]	DC	06/16/2021	P	\$1,001 - \$15,000	
529 DC1 ⇒ Fundamental investors-529F1 (FFXFX) [MF]	DC	12/17/2021	P	\$1,001 - \$15,000	
529 DC1 ⇒ The New Economy Fund-529F1 (FNEEX) [MF]	DC	12/15/2021	P	\$1,001 - \$15,000	
529 DC1 ⇒ Washington Mutual Investors Fund-529F1 (FWMMX) [MF]	DC	06/16/2021	P	\$1,001 - \$15,000	
529 DC2 ⇒ American balanced fund-529F2 [MF]	DC	09/7/2021	P	\$15,001 - \$50,000	
529 DC2 ⇒ American balanced fund-529F2 [MF]	DC	09/3/2021	P	\$15,001 - \$50,000	
529 DC2 ⇒ FFXFX - Fundamental investors-529F2 [MF]	DC	09/7/2021	P	\$1,001 - \$15,000	
529 DC2 ⇒ FFXFX - Fundamental investors-529F2 [MF]	DC	09/3/2021	P	\$1,001 - \$15,000	
529 DC2 ⇒ FNEEX - The New Economy Fund-529F2 [MF]	DC	09/7/2021	P	\$1,001 - \$15,000	
529 DC2 ⇒ FNEEX - The New Economy Fund-529F2 [MF]	DC	09/3/2021	P	\$1,001 - \$15,000	
529 DC2 ⇒ FUEPX - EuroPacific Growth Fund-529F2 [MF]	DC	09/7/2021	P	\$1,001 - \$15,000	
529 DC2 ⇒ FUEPX - EuroPacific Growth Fund-529F2 [MF]	DC	09/3/2021	P	\$1,001 - \$15,000	
529 DC2 ⇒ FWMMX - Washington Mutual Investors Fund-529F2 [MF]	DC	09/7/2021	P	\$1,001 - \$15,000	
529 DC2 ⇒	DC	09/3/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
FWMMX - Washington Mutual Investors Fund-529F2 [MF]					
529 DC2 ⇒ NEWFX - New World Fund-529F2 [MF]	DC	09/7/2021	P	\$1,001 - \$15,000	
529 DC2 ⇒ NEWFX - New World Fund-529F2 [MF]	DC	09/3/2021	P	\$1,001 - \$15,000	
Bain 401k ⇒ Vanguard Target Retirement 2050 [MF]	SP	03/31/2021	P	\$1,001 - \$15,000	
Bain 401k ⇒ Vanguard Target Retirement 2050 [MF]	SP	06/30/2021	P	\$1,001 - \$15,000	
Bain 401k ⇒ Vanguard Target Retirement 2050 [MF]	SP	09/30/2021	S	\$100,001 - \$250,000	<input type="checkbox"/>
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [MF]	SP	09/30/2021	P	\$100,001 - \$250,000	
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [MF]	SP	12/31/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	06/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	DC	06/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	DC	06/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]	DC	06/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI USA Small Cap (ESGU) [EF]	DC	06/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]	DC	06/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI KLD400 SOC (DSI) [MF]	DC	06/21/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]	DC	06/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	10/1/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG MSCI USA Small Cap ETF (ESML) [EF]	DC	10/1/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares TR ESC MSCI USA ETF (ESGU) [EF]	DC	10/1/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares TR ESG MSCI EAFE (ESGD) [EF]	DC	10/1/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]	DC	10/1/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ Ariel Fund (ARAIX) [MF]		04/21/2021	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ Ariel Fund (ARAIX) [MF]		12/17/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ Calvert Flexible Bond (CUBIX) [MF]		04/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ Calvert Flexible Bond (CUBIX) [MF]		12/17/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Calvert Responsible Muni Income (CTTIX) [MF]		04/21/2021	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ Calvert Responsible Muni Income (CTTIX) [MF]		12/17/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Calvert Small Cap (CSVIX) [MF]		04/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ Calvert Small Cap (CSVIX) [MF]		12/17/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Individual Acct - JA ⇒ First Trust Water (FIW) [EF]		04/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ Hartford Municipal Opportunities (HHMIX) [MF]		06/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ Hartford Municipal Opportunities (HHMIX) [MF]		12/17/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Hartford Schroders International Stock (SCIEX) [MF]		12/17/2021	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EAFE (ESGD) [EF]		04/21/2021	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]		04/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ iShares Global Clean Energy ETF (ICLN) [EF]		04/27/2021	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ iShares Global Clean Energy ETF (ICLN) [EF]		09/23/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]		04/21/2021	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ iShares TR ESC MSCI USA ETF (ESGU) [EF]		04/27/2021	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		09/23/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ JPMorgan Short-Intermediate Muni Bond (JIMIX) [MF]		04/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ JPMorgan Short-Intermediate Muni Bond (JIMIX) [MF]		12/17/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ SPDR S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]		04/21/2021	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - MG ⇒	SP	12/17/2021	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ariel Fund (ARAIX) [MF]					
SFP/MMLIS Individual Acct - MG ⇒ BlackRock Strategic Municipal Opportunity Fund(MKMTX) [MF]	SP	12/17/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Calvert Flexible Bond (CUBIX) [MF]	SP	12/17/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Calvert Responsible Muni Income (CTTIX) [MF]	SP	12/17/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Calvert Small Cap (CSVIX) [MF]	SP	12/17/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - MG ⇒ Hartford Municipal Opportunities (HHMIX) [MF]	SP	12/17/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ JPMorgan High Yield Municipal Fund (JTISX) [MF]	SP	12/17/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ JPMorgan Short-Intermediate Muni Bond (JIMIX) [MF]	SP	12/17/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]	SP	09/3/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI EAFE (ESGD) [EF]		01/15/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI EAFE (ESGD) [EF]		05/26/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI EAFE (ESGD) [EF]		07/23/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]		01/15/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]		07/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒		05/26/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares ESG MSCI USA Small Cap (ESGU) [EF]					
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]		01/15/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]		03/23/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]		05/26/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		01/15/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		03/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		05/26/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		07/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		10/21/2021	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - MG ⇒ Ariel Fund (ARAIX) [MF]	SP	09/3/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]	SP	09/3/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Bain & Company	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Metro Credit Union	2018	Mortgage primary residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2020	Filer and City of Newton	Defined benefit plan that provides service retirement benefits.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Aspen Institute, Inc. (Congressional Program)	09/9/2021	09/12/2021	Boston, MA - San Diego, CA - N/A	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none"> 529 DC1 (Owner: DC) LOCATION: MA 529 DC2 (Owner: DC) LOCATION: VA Bain 401k (Owner: SP) Flipside Crypto Investor Holdings, LLC LOCATION: US
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DESCRIPTION: Investment in software-as-a-service company

- SFP/MMLIS Individual Acct - DC1 (Owner: DC)
LOCATION: US
- SFP/MMLIS Individual Acct - DC2 (Owner: DC)
LOCATION: US
- SFP/MMLIS Individual Acct - JA
LOCATION: US
- SFP/MMLIS Individual Acct - MG (Owner: SP)
LOCATION: US
- SFP/MMLIS Roth IRA - JA
- SFP/MMLIS Roth IRA - MG (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. Jake Auchincloss , 05/15/2022