



Filing ID #10055262

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Lynn Peterson  
**Status:** Congressional Candidate  
**State/District:** OR05

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2023  
**Filing Date:** 07/16/2023  
**Period Covered:** 01/01/2021– 12/31/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Peterson trust ⇒ Main House [RP]  LOCATION: Clackamas, OR, US DESCRIPTION: Rental income on main house	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$50,001 - \$100,000
Peterson trust ⇒ Theia Technologies, 38% Interest [OL]  LOCATION: Wilsonville/Clackamas, OR, US DESCRIPTION: Capital account value at Theia Tech	JT	\$100,001 - \$250,000	None		
Retirement accounts ⇒ Fidelity-Lynn ⇒ FASMX [MF]  DESCRIPTION: Fidelity Asset Manager mutual fund		\$50,001 - \$100,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Activision Blizzard, Inc (ATVI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒		\$1 - \$1,000	Tax-Deferred		

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Acuity Brands, Inc. (AYI) [ST]					
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Adobe Inc. (ADBE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Affiliated Managers Group, Inc. (AMG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Airbnb, Inc. - Class A (ABNB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Airbus Group Unsponsored ADR (EADSY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Alnylam Pharmaceuticals, Inc. (ALNY) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Altria Group, Inc. (MO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Amdocs Limited - Ordinary Shares (DOX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ American Express Company (AXP) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

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AMETEK, Inc. (AME) [ST]					
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Amphenol Corporation (APH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Analog Devices, Inc. (ADI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Ares Management Corporation Class A (ARES) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Arthur J. Gallagher & Co. (AJG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ AstraZeneca PLC - American Depositary Shares (AZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Automatic Data Processing, Inc. (ADP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ AutoZone, Inc. (AZO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Bank of America Corporation (BAC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ BlackRock, Inc. (BLK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Boeing Company (BA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Booking Holdings Inc. (BKNG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Boston Scientific Corporation (BSX) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Bristol-Myers Squibb Company (BMY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Broadcom Inc. (AVGO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Caesars Entertainment, Inc. (CZR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Cardinal Health, Inc. (CAH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ CBRE Group Inc Common Stock Class A (CBRE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ CDW Corporation (CDW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Celsius Holdings, Inc. (CELH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Cenovus Energy Inc (CVE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Centene Corporation (CNC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Chubb Limited (CB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Cintas Corporation (CTAS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Clorox Company (CLX) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Coca-Cola Europacific Partners plc - Ordinary Shares (CCEP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Cognizant Technology Solutions Corporation - Class A (CTSH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Comcast Corporation - Class A (CMCSA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ ConocoPhillips (COP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Constellation Energy Corporation (CEG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Copart, Inc. (CPRT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Costco Wholesale Corporation (COST) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Cullen/Frost Bankers, Inc. (CFR) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ CVS Health Corporation (CVS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Danaher Corporation (DHR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ DexCom, Inc. (DXCM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Diageo plc (DEO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Dollar General Corporation (DG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Dollar Tree, Inc. (DLTR) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Dominion Energy, Inc. (D) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ DuPont de Nemours, Inc. (DD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Edison International (EIX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Elevance Health, Inc. (ELV) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Eli Lilly and Company (LLY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ EOG Resources, Inc. (EOG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Equifax, Inc. (EFX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Equinor ASA (EQNR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Evergy, Inc. (EVRG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Exxon Mobil Corporation (XOM) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ FedEx Corporation (FDX) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ First Quantum Minerals Ltd. Ordinary Shares (FQVLF) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ First Solar, Inc. (FSLR) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Fiserv, Inc. (FI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Five Below, Inc. (FIVE) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Freeport-McMoRan, Inc. (FCX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Gartner, Inc. (IT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ GE HealthCare Technologies Inc. (GEHC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Gen Digital Inc. (GEN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ General Electric Company (GE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ GlobalFoundries Inc. - Ordinary Share (GFS) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ GSK plc American Depositary Shares (GSK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ H&R Block, Inc. (HRB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Haleon plc American Depositary Shares (HLN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Heico Corporation (HEIA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Hess Corporation (HES) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Hilton Worldwide Holdings Inc. (HLT) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ HubSpot, Inc. (HUBS) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Humana Inc. (HUM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Imperial Oil Limited (IMO) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Ingersoll Rand Inc. (IR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Interpublic Group of Companies, Inc. (IPG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Intuit Inc. (INTU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Invesco Ltd (IVZ) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Johnson & Johnson (JNJ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Keurig Dr Pepper Inc. (KDP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ KKR & Co. Inc. (KKR) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ KLA Corporation (KLAC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Knight-Swift Transportation Holdings Inc. (KNX) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Kosmos Energy Ltd. Common Shares (KOS) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		



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L3Harris Technologies, Inc. (LHX) [ST]					
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Lam Research Corporation (LRCX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Linde plc Ordinary Shares (LIN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Lowe's Companies, Inc. (LOW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ M&T Bank Corporation (MTB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Marriott International - Class A (MAR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Marsh & McLennan Companies, Inc. (MMC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Marvell Technology, Inc. (MRVL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Maximus, Inc. (MMS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ McKesson Corporation (MCK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Meta Platforms, Inc. - Class A (META) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Mettler-Toledo International, Inc. (MTD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Micron Technology, Inc. (MU) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Mondelez International, Inc. - Class A (MDLZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Moody's Corporation (MCO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Motorola Solutions, Inc. (MSI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ National Grid Transco, PLC National Grid PLC (NGG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Netflix, Inc. (NFLX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Newmont Corporation (NEM) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Nike, Inc. (NKE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Northern Trust Corporation (NTRS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Northrop Grumman Corporation (NOC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Novo Nordisk A/S (NVO) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ NVIDIA Corporation (NVDA) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ NXP Semiconductors N.V. (NXPI) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Occidental Petroleum Corporation (OXY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ ON Semiconductor Corporation (ON) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Open Text Corporation - Common Shares (OTEX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ O'Reilly Automotive, Inc. (ORLY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Oshkosh Corporation (OSK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Ovintiv Inc. (OVV) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Pacific Gas & Electric Co. (PCG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Paychex, Inc. (PAYX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ PENN Entertainment, Inc. (PENN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Pentair plc. Ordinary Share (PNR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Portland General Electric Co (POR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Progressive Corporation (PGR) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Quanta Services, Inc. (PWR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Radian Group Inc. (RDN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Raymond James Financial, Inc. (RJF) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Reckitt Benckiser Plc Sponsored ADR (RBGLY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Regal Rexnord Corporation (RRX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Regeneron Pharmaceuticals, Inc. (REGN) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ RH (RH) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Rivian Automotive, Inc. - Class A (RIVN) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Roche Holdings AG Basel American Depositary Shares (RHHBY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Rockwell Automation, Inc. (ROK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Ross Stores, Inc. (ROST) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ S&P Global Inc. (SPGI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Salesforce, Inc. (CRM) [ST]		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Sanofi - American Depositary Shares (SNY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ SAP SE ADS (SAP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Sea Limited American Depositary Shares, each representing one Class A Ordinary Share (SE) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Siemens AG American Depositary Shares (SIEGY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Snap Inc. Class A (SNAP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Southern Company (SO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Synopsys, Inc. (SNPS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Sysco Corporation (SYY) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ TE Connectivity Ltd. New Switzerland Registered Shares (TEL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Tesla, Inc. (TSLA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ The AES Corporation (AES) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ The Cigna Group (CI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ The Travelers Companies, Inc. (TRV) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Thermo Fisher Scientific Inc (TMO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ TJX Companies, Inc. (TJX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Transdigm Group Incorporated (TDG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ TransUnion (TRU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Truist Financial Corporation (TFC) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Tyson Foods, Inc. (TSN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ U.S. Bancorp (USB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Uber Technologies, Inc. (UBER) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Unilever PLC (UL) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ United Rentals, Inc. (URI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ US Foods Holding Corp. (USFD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Verisk Analytics, Inc. (VRSK) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Vertex Pharmaceuticals Incorporated (VRTX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Vertiv Holdings, LLC Class A (VRT) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Vulcan Materials Company (VMC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Walt Disney Company (DIS) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Warner Music Group Corp. - Class A (WMG) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Waste Connections, Inc. Common Shares (WCN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Wells Fargo & Company (WFC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Willis Towers Watson Public Limited Company - Ordinary Shares (WTW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ WillScot Mobile Mini Holdings Corp. - Class A (WSC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Yum! Brands, Inc. (YUM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Abbott Laboratories (ABT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Appian Corporation - Class A (APPN) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Asana, Inc. Class A (ASAN) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Atea Pharmaceuticals, Inc. - common stock (AVIR) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Atlassian Corporation - Class A (TEAM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Autodesk, Inc. (ADSK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Best Buy Co., Inc. (BBY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ BigCommerce Holdings, Inc. - Series 1 (BIGC) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Boston Beer Company, Inc. (SAM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Box, Inc. Class A (BOX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Celsius Holdings, Inc. (CELH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Cloudflare, Inc. Class A (NET) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Cognex Corporation (CGNX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ CrowdStrike Holdings, Inc. - Class A (CRWD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ DigitalOcean Holdings, Inc. (DOCN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ DocuSign, Inc. (DOCU) [ST]		\$1,001 - \$15,000	Tax-Deferred		



Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Dutch Bros Inc. Class A (BROS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Fathom Holdings Inc. (FTHM) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Fiverr International Ltd. Ordinary Shares, no par value (FVRR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ FSMEX [MF] DESCRIPTION: Fidelity Medical Technology mutual fund		\$50,001 - \$100,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Fulgent Genetics, Inc. (FLGT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Garmin Ltd. Common Stock (GRMN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Globus Medical, Inc. Class A (GMED) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ GoodRx Holdings, Inc. - Class A (GDRX) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ HubSpot, Inc. (HUBS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ InMode Ltd. - Ordinary Shares (INMD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Intuit Inc. (INTU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ JD.com, Inc. - American Depositary Shares (JD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ JFrog Ltd. - Ordinary shares (FROG) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Kinsale Capital Group, Inc. (KNSL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Kodiak Sciences Inc (KOD) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Lam Research Corporation (LRCX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Lemonade, Inc. (LMND) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ lululemon athletica inc. (LULU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Marvell Technology, Inc. (MRVL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Meta Platforms, Inc. - Class A (META) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ NVIDIA Corporation (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Okta, Inc. - Class A (OKTA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Paycom Software, Inc. (PAYC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Poshmark, Inc. - Class A (POSH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Progyny, Inc. (PGNY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ PubMatic, Inc. - Class A (PUBM) [ST]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Reata Pharmaceuticals, Inc. - Class A (RETA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Rivian Automotive, Inc. - Class A (RIVN) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Roku, Inc. - Class A (ROKU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Salesforce, Inc. (CRM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Semler Scientific, Inc. (SMLR) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Skillz Inc. Class A (SKLZ) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Snowflake Inc. Class A (SNOW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Sprout Social, Inc - Class A (SPT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Take-Two Interactive Software, Inc. (TTWO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Tattooed Chef, Inc. - Class A (TTCF) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ The Trade Desk, Inc. - Class A (TTD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Twilio Inc. Class A (TWLO) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Umpqua Holdings Corporation (UMPQ) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Unity Software Inc. (U) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Vertex Pharmaceuticals Incorporated (VRTX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Vinci Partners Investments Ltd. - Class A Common Shares (VINP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Workday, Inc. - Class A (WDAY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Zebra Technologies Corporation - Class A (ZBRA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark rollover IRA ⇒ Zoom Video Communications, Inc. - Class A (ZM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Airbnb, Inc. - Class A (ABNB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Block, Inc. Class A Common Stock, (SQ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Boston Omaha Corporation Class A (BOC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Calliditas Therapeutics AB - American Depositary Shares (CALT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Castle Biosciences, Inc. - Common stock (CSTL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Coinbase Global, Inc. - Class A (COIN) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ COMPASS Pathways Plc - American Depositary Shares (CMPS) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ CrowdStrike Holdings, Inc. - Class A (CRWD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Docebo Inc. - Common Shares (DCBO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Endava plc American Depositary Shares (DAVA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Goosehead Insurance, Inc. - Class A (GSHD) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ IDEXX Laboratories, Inc. (IDXX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Infineon Technologies AG (IFNNY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Johnson & Johnson (JNJ) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Live Oak Bancshares, Inc. (LOB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Netflix, Inc. (NFLX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Novavax, Inc. (NVAX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ NVIDIA Corporation (NVDA) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Outset Medical, Inc. (OM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ PayPal Holdings, Inc. (PYPL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Stitch Fix, Inc. - Class A (SFIX) [ST]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ UiPath, Inc. Class A (PATH) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Upstart Holdings, Inc. - Common stock (UPST) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Vertex Pharmaceuticals Incorporated (VRTX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Walker & Dunlop, Inc (WD) [ST]		\$1 - \$1,000	Tax-Deferred		
Retirement accounts ⇒ Fidelity-Mark SEP ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Hancock-Lynn ⇒ SGA IRA [MF] DESCRIPTION: SGA retirement-John Hancock		\$1,001 - \$15,000	Tax-Deferred		
Retirement accounts ⇒ Mission Sq-Lynn ⇒ Metro-Mission Square [MF] DESCRIPTION: Metro retirement-Mission Square		\$15,001 - \$50,000	Tax-Deferred		
Retirement accounts ⇒ PERS-Lynn active ⇒ PERS IAP [PE] DESCRIPTION: PERS Oregon		\$100,001 - \$250,000	Tax-Deferred		
Retirement accounts ⇒ PERS-Lynn LOM ⇒ PERS LOM [PE] DESCRIPTION: PERS Oregon loss of membership account		\$15,001 - \$50,000	Tax-Deferred		
Retirement accounts ⇒ Voya-Lynn ⇒ IRA-Clackamas [MF] DESCRIPTION: Clackamas retirement-Voya		\$1,001 - \$15,000	Tax-Deferred		
Wallowa County Property [RP] LOCATION: Wallowa, OR, US	JT	\$100,001 - \$250,000	Rent	\$1 - \$200	\$1 - \$200

\* 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 Current Year to Filing	Amount Preceding Year
Oregon Metro	Salary	\$155,600.00	\$148,800.00
Theia Technologies	Spouse guaranteed payments	\$196,699.00	\$63,948.00
Rental of primary residence	Rental of primary residence	\$53,755.00	\$54,453.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Chase Bank	January 2022	Credit Card	\$10,000 - \$15,000
JT	Driveway finance	Aug. 2022	Auto loan	\$15,001 - \$50,000
JT	Shellpoint Mortgage	2019	Primary residence mortgage	\$1,000,001 - \$5,000,000
JT	US Bank	May 2019	Primary residence HELOC	\$15,001 - \$50,000
JT	US Bank	Jan 2015	Airstream loan	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- o Peterson trust (Owner: JT)  
DESCRIPTION: Peterson family trust
- o Retirement accounts  
DESCRIPTION: Retirement investment accounts
- o Retirement accounts ⇒ Fidelity-Lynn

DESCRIPTION: Lynn Fidelity retirement

- Retirement accounts ⇒ Fidelity-Mark managed IRA  
DESCRIPTION: Fidelity managed account -906
- Retirement accounts ⇒ Fidelity-Mark rollover IRA  
DESCRIPTION: Rollover IRA -186
- Retirement accounts ⇒ Fidelity-Mark SEP  
DESCRIPTION: Fidelity SEP account -274
- Retirement accounts ⇒ Handcock-Lynn  
DESCRIPTION: SGA retirement account
- Retirement accounts ⇒ Mission Sq-Lynn  
DESCRIPTION: Metro retirement account
- Retirement accounts ⇒ PERS-Lynn active  
DESCRIPTION: Active PERS-Oregon IAP account
- Retirement accounts ⇒ PERS-Lynn LOM  
DESCRIPTION: Loss of membership PERS-Oregon account
- Retirement accounts ⇒ Voya-Lynn  
DESCRIPTION: Clackamas retirement

## 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:** Lynn Peterson , 07/16/2023