



Filing ID #10055262

FINANCIAL DISCLOSURE REPORT

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

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] | JT | \$1,000,001 - \$5,000,000 | Rent | \$50,001 - \$100,000 | \$50,001 - \$100,000 |
| LOCATION: Clackamas, OR, US DESCRIPTION: Rental income on main house | | | | | |
| Peterson trust ⇒ Theia Technologies, 38% Interest [OL] | JT | \$100,001 - \$250,000 | None | | |
| LOCATION: Wilsonville/Clackamas, OR, US DESCRIPTION: Capital account value at Theia Tech | | | | | |
| Retirement accounts ⇒ Fidelity-Lynn ⇒ FASMX [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| DESCRIPTION: Fidelity Asset Manager mutual fund | | | | | |
| 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 Depository 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 Depository 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 Depository 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 Depository Shares (HLN) [ST] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Heico Corporation (HEI.A) [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 Depository 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 | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|--------------------|----------------|-------------------------------|-----------------------|
| Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Sanofi - American Depository 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 Depository Shares, each representing one Class A Ordinary Share (SE) [ST] | | \$1 - \$1,000 | Tax-Deferred | | |
| Retirement accounts ⇒ Fidelity-Mark managed IRA ⇒ Siemens AG American Depository 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 | | |

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|--|-------|--------------------|----------------|-------------------------------|-----------------------|
| 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 | | |

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|--|-------|----------------------|----------------|-------------------------------|-----------------------|
| 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] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| DESCRIPTION: Fidelity Medical Technology mutual fund | | | | | |
| 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 Depository 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 | | |

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|---|-------|--------------------|----------------|-------------------------------|-----------------------|
| 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 Depository 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 Depository 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 Depository 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 | | |

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|---|-------|-----------------------|----------------|-------------------------------|-----------------------|
| 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 ⇒ Handcock-Lynn ⇒ SGA IRA [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: SGA retirement-John Handcock | | | | | |
| Retirement accounts ⇒ Mission Sq-Lynn ⇒ Metro-Mission Square [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| DESCRIPTION: Metro retirement-Mission Square | | | | | |
| Retirement accounts ⇒ PERS-Lynn active ⇒ PERS IAP [PE] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| DESCRIPTION: PERS Oregon | | | | | |
| Retirement accounts ⇒ PERS-Lynn LOM ⇒ PERS LOM [PE] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| DESCRIPTION: PERS Oregon loss of membership account | | | | | |
| Retirement accounts ⇒ Voya-Lynn ⇒ IRA-Clackamas [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: Clackamas retirement-Voya | | | | | |
| Wallowa County Property [RP] | JT | \$100,001 - \$250,000 | Rent | \$1 - \$200 | \$1 - \$200 |
| LOCATION: Wallowa, OR, US | | | | | |

* 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

- Peterson trust (Owner: JT)
DESCRIPTION: Peterson family trust
- Retirement accounts
DESCRIPTION: Retirement investment accounts
- 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