



Filing ID #10059953

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Laurie Buckhout
Status: Congressional Candidate
State/District: NC01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/14/2024
Period Covered: 01/01/2023– 04/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BUCKHOUT CHARTIBLE REMAINDER TRUST ⇒ BUCKHOUT CHARTIBLE TRUST [OT]		\$5,000,001 - \$25,000,000	Capital Gains, Dividends, Interest	\$1,000,001 - \$5,000,000	\$1,000,001 - \$5,000,000
DESCRIPTION: SPLIT INTEREST CHARTIBLE REMAINDER TRUST					
CHECKING [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Adobe Inc. - Common Stock (ADBE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	None
INVESTMENT PORTOFOLIO ⇒ Advanced Micro Devices, Inc. (AMD) [ST]		\$1,001 - \$15,000	Dividends	None	None
INVESTMENT PORTOFOLIO ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$1,001 - \$15,000	Dividends	None	None
INVESTMENT PORTOFOLIO ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒		\$1,001 - \$15,000	Dividends	\$201 -	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Amgen Inc. - Common Stock (AMGN) [ST]				\$1,000	
INVESTMENT PORTOFOLIO ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Becton, Dickinson and Company Common Stock (BDX) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$1,001 - \$15,000	None		
INVESTMENT PORTOFOLIO ⇒ BlackRock, Inc. Common Stock (BLK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Castellum, Inc. Common Stock (CTM) [ST]		\$1,001 - \$15,000	None		
INVESTMENT PORTOFOLIO ⇒ Cboe Global Markets, Inc. (CBOE) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Deere & Company Common Stock (DE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: DC-1					
INVESTMENT PORTOFOLIO ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFOLIO ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
INVESTMENT PORTOFOLIO ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: DC-1					
INVESTMENT PORTOFOLIO ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: DC-1					
INVESTMENT PORTOFOLIO ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: DC-1					
INVESTMENT PORTOFOLIO ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Linde plc - Ordinary Shares (LIN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Mastercard Incorporated Common Stock (MA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Monster Beverage Corporation - Common Stock (MNST)		\$1,001 - \$15,000	Dividends	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[ST]					
INVESTMENT PORTOFOLIO ⇒ MSCI Inc. Common Stock (MSCI) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Northrop Grumman Corporation Common Stock (NOC) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Palo Alto Networks, Inc. (PANW) [ST]		\$1 - \$1,000	None		
INVESTMENT PORTOFOLIO ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Prologis, Inc. Common Stock (PLD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ QUALCOMM Incorporated - Common Stock (QCOM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Rockwell Automation, Inc. Common Stock (ROK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ ServiceNow, Inc. Common Stock (NOW) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFOLIO ⇒ SPDR S&P 500 EFT TRUST [OT]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: EXCHANGE -TRADED & CLOSE-ENDED FUNDS					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
INVESTMENT PORTOFOLIO ⇒ SPRDR BLOOMBERG 1-3 MONTH T-B [OT]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: EXCHANGE-TRADED & CLOSED-END FUNDS					
INVESTMENT PORTOFOLIO ⇒ The Cigna Group Common Stock (CI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ T-Mobile US, Inc. (TMUS) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Transdigm Group Incorporated Common Stock (TDG) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFOLIO ⇒ Uber Technologies, Inc. Common Stock (UBER) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ VANGUARD LARGE CAP ETF [OT]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: EXCANGE TRADED & CLOSE END FUNDS					
INVESTMENT PORTOFOLIO ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ Walt Disney Company (DIS) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ AbbVie Inc. Common Stock (ABBV) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AGCO Corporation Common Stock (AGCO) [ST]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$1 - \$1,000	None		
Air Products and Chemicals, Inc. Common Stock (APD) [ST]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$1,001 - \$15,000	None		
Alphabet Inc. - Class A Common Stock (GOOGL) [ST]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
American Electric Power Company, Inc. (AEP) [ST]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$15,001 - \$50,000	None		
Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
BlackRock, Inc. Common Stock (BLK) [ST]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$1,000,001 - \$5,000,000	None		
BREIT CL S [HE]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Broadcom Inc. - Common Stock (AVGO) [ST]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Corporation (SCHW) [ST]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Chevron Corporation Common Stock (CVX) [ST]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Chubb Limited Common Stock (CB) [ST]					
INVESTMENT PORTOFOLIO ⇒ INVESTMENT	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PORTOFILO ⇒ Citigroup, Inc. Common Stock (C) [ST]					
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Colgate-Palmolive Company Common Stock (CL) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Constellation Brands, Inc. Common Stock (STZ) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Corning Incorporated Common Stock (GLW) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ CVS Health Corporation Common Stock (CVS) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Dell Technologies Inc. Class C Common Stock (DELL) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Electronic Arts Inc. - Common Stock (EA) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Elevance Health, Inc. Common Stock (ELV) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Emerson Electric Company Common Stock (EMR) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Freeport-McMoRan, Inc. Common Stock (FCX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Honeywell International Inc. (HON) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ International Business Machines Corporation Common Stock (IBM) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Johnson & Johnson Common Stock (JNJ) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Knight-Swift Transportation Holdings Inc. (KNX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Lowe's Companies, Inc. Common Stock (LOW) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ McDonald's Corporation Common Stock (MCD) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ MORAN STANLEY PRIVATE BANK [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ MORGAN STANLEY PRIVATE BANK [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ MORGAN STANLEY PRIVATE BANK [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ MSBNA PREFERRED SAVINGS [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ PayPal Holdings, Inc. - Common Stock (PYPL) [ST]	JT	\$1 - \$1,000	None		
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Procter & Gamble Company (PG) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Prologis, Inc. Common Stock (PLD) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Salesforce, Inc. Common Stock (CRM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ Sensata Technologies Holding plc Ordinary Shares (ST) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO ⇒ INVESTMENT PORTOFILO ⇒ SPDR Bloomberg 1-3 Month T-Bill ETF (BIL) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Valero Energy Corporation Common Stock (VLO) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Walmart Inc. Common Stock (WMT) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO ⇒ Walt Disney Company (DIS) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO DC-2 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFLIO DC-2 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFLIO DC-2 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO DC-2 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO DC-2 ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
INVESTMENT PORTOFLIO DC-2 ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO DC-2 ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO DC-2 ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFLIO DC-2 ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
INVESTMENT PORTOFOLIO DC-2 ⇒ MORGAN STANLEY PRIVATE BANK [OT] DESCRIPTION: ash	DC	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
INVESTMENT PORTOFOLIO DC-2 ⇒ MORGAN STANLEY PRIVATE BANK [OT] DESCRIPTION: dc-2	DC	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
MOEGAN STANLEY PRIVATE BANK [BA] DESCRIPTION: DC 1	DC	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
MORGAN STANLY PRIVATE BANK [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
REAL ESTATE ⇒ RESIDENCE [RP] LOCATION: EDTON, NC, US	JT	\$1,000,001 - \$5,000,000	None		
RESIDENCE [RP] LOCATION: EDTON ,NC, NC, US	JT	\$1,000,001 - \$5,000,000	None		
ROTH IRA ⇒ Adobe Inc. - Common Stock (ADBE) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	\$1,001 - \$15,000	None		
ROTH IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	\$1,001 - \$15,000	None		
ROTH IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ROTH IRA ⇒ Cboe Global Markets, Inc. (CBOE) [ST]	SP	\$1,001 - \$15,000	None		
ROTH IRA ⇒ Deere & Company Common Stock (DE) [ST]	SP	\$1,001 - \$15,000	None		
ROTH IRA ⇒ Eli Lilly and Company Common Stock (LLY) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Emerging Markets Equity Select ETF (RNEM) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Home Depot, Inc. (HD) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Invesco Exchange-Traded Self-Indexed Fund Trust Invesco Russell 1000 Dynamic Multifactor ETF (OMFL) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Invesco S&P 500 Pure Growth ETF (RPG) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Invesco S&P 500 Pure Growth ETF (RPG) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Invesco S&P 500 Pure Value ETF (RPV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ROTH IRA ⇒ iShares MSCI Japan Index Fund (EWJ) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ iShares MSCI Pacific Ex-Japan Index Fund (EPP) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ iShares Russell 1000 ETF (IWB) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ iShares Russell 1000 Value ETF (IWD) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ iShares Russell 2000 Value ETF (IWN) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ROTH IRA ⇒ Linde plc - Ordinary Shares (LIN) [ST]	SP	\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Monster Beverage Corporation - Common Stock (MNST) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA ⇒ MORGAN STANLEY PRIVATE BANK [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ MORGAN STANLEY PRIVATE BANK [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ MSCI Inc. Common Stock (MSCI) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Northrop Grumman Corporation Common Stock (NOC) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ PDL BioPharma, Inc. (PDLI) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Procter & Gamble Company (PG) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ROTH IRA ⇒ QUALCOMM Incorporated - Common Stock (QCOM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Salesforce, Inc. Common Stock (CRM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Schwab Fundamental Emerging Markets Large Company Index ETF (FNDE) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA ⇒ Schwab Fundamental International Large Company Index ETF (FNDF) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA ⇒ SPDR Bloomberg 1-3 Month T-Bill ETF (BIL) [EF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ SPDR S&P Dividend ETF (SDY) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ The Cigna Group Common Stock (CI) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ T-Mobile US, Inc. (TMUS) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Transdigm Group Incorporated Common Stock (TDG) [ST]	SP	\$1,001 - \$15,000	None		
ROTH IRA ⇒ Uber Technologies, Inc. Common Stock (UBER) [ST]	SP	\$1,001 - \$15,000	None		
ROTH IRA ⇒ United States Diesel Heating Oil Fund LP (UHN) [ST]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ROTH IRA ⇒ Vanguard FTSE European ETF (VGK) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
ROTH IRA ⇒ Visa Inc. (V) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Walt Disney Company (DIS) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ WisdomTree Japan Hedged Equity Fund (DXJ) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Xtrackers MSCI Europe Hedged Equity ETF (DBEU) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ BlackRock, Inc. Common Stock (BLK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ Invesco Exchange-Traded Self-Indexed Fund Trust Invesco Russell 1000 Dynamic Multifactor ETF (OMFL) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ Invesco S&P 500 Pure Growth ETF (RPG) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SEP IRA ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF (EEMV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares MSCI Japan Index Fund (EWJ) [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares MSCI Pacific Ex-Japan Index Fund (EPP) [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares Russell 1000 Value ETF (IWD) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares Russell 2000 Value ETF (IWN) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ MORGAN STANLEY PRIVATE BANK [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ Schwab Fundamental Emerging Markets Large Company		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Index ETF (FNDE) [EF]					
SEP IRA ⇒ Schwab Fundamental International Large Company Index ETF (FNDF) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ SPDR S&P Dividend ETF (SDY) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ Vanguard FTSE European ETF (VGK) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ WisdomTree Japan Hedged Equity Fund (DXJ) [EF]		\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
SEP IRA ⇒ Xtrackers MSCI Europe Hedged Equity ETF (DBEU) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TRADITIONAL IRA ⇒ BlackRock 2022 Global Income Opportunity Trust Common Shares of Beneficial Interest (BGIO) [ET]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ Direxion Work From Home ETF (WFH) [EF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ Invesco Exchange-Traded Self-Indexed Fund Trust Invesco Russell 1000 Dynamic Multifactor ETF (OMFL) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ Invesco S&P 500 Pure Growth ETF (RPG) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TRADITIONAL IRA ⇒ Invesco S&P 500 Pure Value ETF (RPV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
TRADITIONAL IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
TRADITIONAL IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TRADITIONAL IRA ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
TRADITIONAL IRA ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF (EEMV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ iShares MSCI Japan Index Fund (EWJ) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ iShares MSCI Pacific Ex-Japan Index Fund (EPP) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ iShares Russell 1000 ETF (IWB) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
TRADITIONAL IRA ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
TRADITIONAL IRA ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
TRADITIONAL IRA ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TRADITIONAL IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ MORGAN STANLEY FIN LLC T LKD 3o [OT]		\$1,000,001 - \$5,000,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
DESCRIPTION: IRA					
TRADITIONAL IRA ⇒ MORGAN STANLEY PRIVATE BANK [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
TRADITIONAL IRA ⇒ MORGAN STANLEY PRIVATE BANK [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
TRADITIONAL IRA ⇒ MORGAN STANLEY PRIVATE BANK [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
TRADITIONAL IRA ⇒ MORGAN STANLEY PRIVATE BANK [BA]	SP	\$1,001 - \$15,000	Rent	\$1 - \$200	\$1 - \$200
TRADITIONAL IRA ⇒ Schwab Fundamental Emerging Markets Large Company Index ETF (FNDE) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
TRADITIONAL IRA ⇒ Schwab Fundamental International Large Company Index ETF (FNDF) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
TRADITIONAL IRA ⇒ SPDR S&P Dividend ETF (SDY) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ Vanguard FTSEEuropean ETF (VGK) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
TRADITIONAL IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
TRADITIONAL IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
TRADITIONAL IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TRADITIONAL IRA ⇒ WisdomTree Japan Hedged Equity Fund (DXJ) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
TRADITIONAL IRA ⇒ Xtrackers MSCI Europe Hedged Equity ETF (DBEU) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TRADITIONAL IRA ⇒ TRADIONAL IRA ⇒ MORGAN STANLEY PRIVATE BANK [BA] DESCRIPTION: 529 plan	SP	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
TRADITIONAL IRA ⇒ TRADIONAL IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
TRADITIONAL IRA ⇒ TRADIONAL IRA ⇒ VCP.COLLEGE FUND [5P] LOCATION: VA	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
VCP/COLLEGE FUND ⇒ VCP/COLLEGE AMERICA [5P] LOCATION: VA DESCRIPTION: 529 plan	SP	\$100,001 - \$250,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000

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

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	MDB GROUP	2021	MORTGAGE ON PERSONAL RESIDENCE	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
EMPLOYEE	CORVUS CONXULTING GROUP LLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- BUCKHOUT CHARTIBLE REMAINDER TRUST
- INVESTMENT PORTOFLIO (Owner: JT)
DESCRIPTION: LAURIE M BUCKHOUT & PAUL BUCKHOUT JT TEN MORGAN STANLEY
- INVESTMENT PORTOFLIO
- INVESTMENT PORTOFLIO (Owner: DC)
- INVESTMENT PORTOFLIO ⇒ INVESTMENT PORTOFILO (Owner: JT)
DESCRIPTION: E
- INVESTMENT PORTOFLIO DC-2 (Owner: DC)
DESCRIPTION: LAURIE M BUCKHOUT & PAUL BUCKHOUT JT MORGAN STANLEY
- REAL ESTATE (100% Interest) (Owner: JT)
LOCATION: EDENTON, NC, US
- ROTH IRA
DESCRIPTION: ROTH IRA MAPS GLOBAL CORE EQUITY ETFS
- ROTH IRA (Owner: SP)
DESCRIPTION: MAPS US MODEL
- SEP IRA
DESCRIPTION: MAPS GLOBAL CORE EQUITY ETFS
- TRADITIONAL IRA (Owner: SP)
- TRADITIONAL IRA (Owner: SP)
DESCRIPTION: MAPS GLOBAL EQUITY ETFS
- TRADITIONAL IRA
- TRADITIONAL IRA ⇒ TRADIONAL IRA (Owner: SP)
- VCP/COLLEGE FUND (Owner: SP)
LOCATION: VA
DESCRIPTION: VCSP/COLLEGE FUND FBO THOMAS A BUCKHOOUT

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: Laurie Buckhout , 05/14/2024