



Filing ID #10052987

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Rebecca 'Becca' Balint  
**Status:** Member  
**State/District:** VToo

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2022  
**Filing Date:** 05/15/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brattleboro Savings & Loan [BA]	JT	\$1,001 - \$15,000	None		
DC 1 Education Trust ⇒ American Beach Small Cap Val R5 (AVFIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ Baron Emerging Markets Fund Instl (BEXIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ Eaton Vance Income Fund of Boston Cl I (EIBIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ Fidelity Advisor Total Bond Cl Z (FBKWX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ John Hancock Disciplined Value I (JVLIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ JPMorgan Core Bond Class I (WOBDX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒	DC	\$1,001 - \$15,000	None		

<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>
MFS Growth Fund Class I [MF]					
DC 1 Education Trust ⇒ MFS Mid Cap Value Fund CL I [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ T Rowe Price Overseas Stock I CL (TROIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ Touchstone Mid Cap Growth CL Y (TEGYX) [MF]	DC	\$1,001 - \$15,000	None		
DC 1 Education Trust ⇒ Victory Trivalent Intl Small Cap I (MISIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 1 Education Trust ⇒ Wasatch Small Cap Growth Fund Instl CL (WIAEX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ American Beach Small Cap Val R5 (AVFIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ Baron Emerging Markets Fund Instl (BEXIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ Eaton Vance Income Fund of Boston Cl I (EIBIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ Fidelity Advisor Total Bond Cl Z (FBKWX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ John Hancock Disciplined Value I (JVLIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ JPMorgan Core Bond Class I (WOBDX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ MFS Growth Fund Class I [MF]	DC	\$1,001 - \$15,000	None		
DC 2 Education Trust ⇒ MFS Mid Cap Value Fund CL I (MCVIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200

<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>
DC 2 Education Trust ⇒ T Rowe Price Overseas Stock I CL (TROIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ Touchstone Mid Cap Growth CL Y (TEGYX) [MF]	DC	\$1,001 - \$15,000	None		
DC 2 Education Trust ⇒ Victory Trivalent Intl Small Cap I (MISIX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
DC 2 Education Trust ⇒ Wasatch Small Cap Growth Fund Instl CL (WIAEX) [MF]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Elizabeth Wohl IRA ⇒ Boston Trust Midcap Fund (BTMFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Calvert Conservative Allocation Class I (CFAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Calvert Emerging Markets Equity CL I (CVMIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Calvert Flexible Bond CL i (CUBIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Calvert Short Duration Inc FD I (CDSIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Calvert Small Cap CL I (CSVIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Ecofin Global Renewables Infra Ins (ECOIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Fidelity MMKT Premium Class [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Invesco Floating Rate Esg CL Y (AFRYX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ishares TR ESG AW MSCI EAFE (ESGD) [MF]					
Elizabeth Wohl IRA ⇒ IShares TR USD GRN Bond ETF (BGRN) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Parnassus Core Equity Investor (PRBLX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Praxis Value Index Class A (MVIAX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ TCW New Americas Premium Equities N (TGUNX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl IRA ⇒ Trillium Esg Global Equity Fund Retail (PORTX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Boston Trust Walden Small Cap Fund (BOSOX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Brown Advisory Sustain Growth Inst (BAFWX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Calvert Green Bond Class I (CGBIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Calvert US Lrg Cap Val Respons Index I (CFJIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Hartford Schroder Emerg Mkts Eq Cl Y (HHHYX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ Impax High Yield Bond Instl Cl (PXHIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ IShares TR Esg Aw MSCI EAFE (ESGD) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒	SP	\$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>
Parnassus Core Equity Instl (PRILX) [MF]					
Elizabeth Wohl Roth IRA ⇒ Parnassus Mid Cap FD Institutional (PFPMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ PIMCO Low Duration Esg Fund Instl (PLDIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Elizabeth Wohl Roth IRA ⇒ TIAA-CREF Core Impact Bond Instl (TSBIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Inc. 401k ⇒ FID Freedom 2040 [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity Global Ex US Index Fund (FSGGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity Large Cap Growth Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity Large Cap Value Index Fund (FLCOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity Small Cap Index Fund (FSSNX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint IRA ⇒ Fidelity US Bond Index Fund (FXNAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Boston Trust Walden Small Cap Fund (BOSOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Brown Advisory Sustain Growth Inst (BAFWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Calvert Green Bond Class I (CGBIX) [MF]					
Rebecca Balint Roth IRA ⇒ Calvert US Lrg Cap Val Respons Index I (CFJIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Hartford Schroder Emerg Mkts Eq Cl Y (HHHYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Impax High Yield Bond Instl Cl (PXHIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ IShares TR ESG Aw Msci EAFE (ESGD) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Parnassus Core Equality Instl (PRILX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Parnassus Mid Cap Fd Institutional (PFPMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ Pimco Low Duration Esg Fund Instl (PLDIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rebecca Balint Roth IRA ⇒ TIAA-CREF Core Impact Bond Instl (TSBIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vermont State Teachers Pension [PE]		\$15,001 - \$50,000	Tax-Deferred		
VHEIP 529 Plan ⇒ Vermont's 529 College Savings Plan [5P] LOCATION: VT	SP	\$15,001 - \$50,000	Tax-Deferred		
VHEIP 529 Plan ⇒ Vermont's 529 College Savings Plan [5P] LOCATION: VT	SP	\$15,001 - \$50,000	Tax-Deferred		

\* 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
Downs Rachlin Martin PLLC	Spouse Salary	N/A	N/A
State of Vermont	Salary	N/A	\$45,480.46

## SCHEDULE D: LIABILITIES

None disclosed.

## 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

- DC 1 Education Trust (Owner: DC)
- DC 2 Education Trust (Owner: DC)
- Elizabeth Wohl IRA (Owner: SP)
- Elizabeth Wohl Roth IRA (Owner: SP)
- Fidelity Inc. 401k (Owner: SP)
- Rebecca Balint IRA
- Rebecca Balint Roth IRA
- VHEIP 529 Plan (Owner: SP)  
LOCATION: VT  
DESCRIPTION: DC1
- VHEIP 529 Plan (Owner: SP)  
LOCATION: VT  
DESCRIPTION: DC2

## 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:** Hon. Rebecca 'Becca' Balint , 05/15/2023