



Filing ID #10051941

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Gary Palmer
Status: Member
State/District: AL06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 05/8/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|----------------|--------|-------------------------------------|
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Capitol Series Tr Fund FTVSX [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Inst ETILX [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Healthcare & Life ETIHX [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Healthcare & Life ETIHX [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | SP | \$100,001 - \$250,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|---------------------|----------------|-------------------|-------------------------------------|
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ OneAscent Internatinal Equ OAIM [EF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ OneAscent Large Cap Core ETF OALC [EF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Timothy Plan High Dividend TPHD [EF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Timothy Plan High Yield Bd TPHIX [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Alphacentric Income Opp IOFIX [MF] | JT | None | Capital Gains | \$1,001 - \$2,500 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AT&T Inc. (T) [ST] | JT | \$1,001 - \$15,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert International COIIX [MF] | JT | None | None | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Capitol Series Tr Fund FTVSX [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Inst ETILX [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | \$1,001 - \$15,000 | None | | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|----------------|-------------------|-------------------------------------|
| Eventide Healthcare & Life ETIHX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ ishares 0-5 year tips bond (STIP) [EF] | JT | None | None | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Mutual Fund Series Trust EV ETIDX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Oneascent Core Plus Bond ET OACP [EF] | JT | \$100,001 - \$250,000 | Dividends | \$2,501 - \$5,000 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ OneAscent Internatonal Equ OAIM [EF] | JT | \$1,001 - \$15,000 | None | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ OneAscent Large Cap Core ETF OALC [EF] | JT | \$15,001 - \$50,000 | None | | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Timothy Plan High Dividend TPHD [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Timothy Plan High Yield Bd TPHIX [MF] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Short Term Treasury VGSH [EF] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Capitol Series Tr Fund FTVSX [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-----------------------|----------------|--------------|-------------------------------------|
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Gilead FD Inst ETILX [MF] | | \$1,001 - \$15,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Healthcare & Life ETIHX [MF] | | \$1,001 - \$15,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF] | | \$1,001 - \$15,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | | \$100,001 - \$250,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ OneAscent Internatonal Equ OAIM [EF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ OneAscent Large Cap Core ETF OALC [EF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Timothy Plan High Dividend TPHD [EF] | | \$1,001 - \$15,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Timothy Plan High Yield Bd TPHIX [MF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF] | | \$1,001 - \$15,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input checked="" type="checkbox"/> |
| Canaan LLC [RP] | | \$100,001 - \$250,000 | | None | <input type="checkbox"/> |
| LOCATION: Lamar County, AL, US DESCRIPTION: Timber Land | | | | | |
| Equitable (formerly AXA Equitable) [OT] | | \$15,001 - \$50,000 | Interest | \$1,001 - | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|--------------------|----------------|-----------------|--------------------------|
| | | | | \$2,500 | <input type="checkbox"/> |
| DESCRIPTION: Flexible Premium Variable Life Insurance | | | | | |
| United States Savings Bonds Series EE [GS] | | \$1,001 - \$15,000 | Interest | \$201 - \$1,000 | <input type="checkbox"/> |

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

SCHEDULE B: TRANSACTIONS

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------|---------------------|--------------------------|
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opp IOFIX [MF] | SP | 04/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opp IOFIX [MF] | SP | 04/5/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opp IOFIX [MF] | SP | 04/13/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opp IOFIX [MF] | SP | 04/19/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opp IOFIX [MF] | SP | 04/20/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opp IOFIX [MF] | SP | 06/9/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert EMG Mkts Eq Cl CVMIX [MF] | SP | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert International COIIX [MF] | SP | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Capitol Series Tr Fund FTVSX [MF] | SP | 09/16/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Inst ETILX [MF] | SP | 08/3/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|----------|---------------------|--------------------------|
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Inst ETILX [MF] | SP | 02/17/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Inst ETILX [MF] | SP | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Inst ETILX [MF] | SP | 10/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Healthcare & Life ETIHX [MF] | SP | 10/4/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ ishares o-5 year tips bond (STIP) [EF] | SP | 08/2/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ MFST Eventide Core Bond Fund ETIRX [EF] | SP | 03/21/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ MFST Eventide Core Bond Fund ETIRX [EF] | SP | 03/22/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ MFST Eventide Core Bond Fund ETIRX [EF] | SP | 03/23/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ MFST Eventide Core Bond Fund ETIRX [EF] | SP | 03/24/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ MFST Eventide Core Bond Fund ETIRX [EF] | SP | 03/25/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ MFST Eventide Core Bond Fund ETIRX [EF] | SP | 03/28/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ MFST Eventide Core Bond Fund ETIRX [EF] | SP | 04/4/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ MFST Eventide Core Bond Fund ETIRX [EF] | SP | 04/5/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF] | SP | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ | SP | 06/7/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------|----------------------|--------------------------|
| Mutual Fund Series Trust EV ETIDX [MF] | | | | | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Northern Lights Inspire Cor IBD [EF] | SP | 10/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | SP | 03/31/2022 | P | \$50,001 - \$100,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | SP | 04/1/2022 | P | \$15,001 - \$50,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | SP | 04/4/2022 | P | \$50,001 - \$100,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | SP | 04/5/2022 | P | \$50,001 - \$100,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | SP | 09/16/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | SP | 07/28/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ OneAscent Internatlonal Equ OAIM [EF] | SP | 09/16/2022 | P | \$15,001 - \$50,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ OneAscent Large Cap Core ETF OALC [EF] | SP | 06/27/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ OneAscent Large Cap Core ETF OALC [EF] | SP | 02/25/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ OneAscent Large Cap Core ETF OALC [EF] | SP | 10/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ SCM Trust Shelton International SISEX [MF] | SP | 09/15/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Timothy Plan High Dividend TPHD [EF] | SP | 10/4/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Timothy Plan High Dividend TPHD [EF] | SP | 08/2/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|--------------|-------------|-----------------|---------------------|-------------------------------|
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Timothy Plan High Dividend TPHD [EF] | SP | 12/6/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Timothy Plan High Yield Bd TPHIX [MF] | SP | 07/25/2022 | P | \$15,001 - \$50,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Timothy Plan International TPIF [EF] | SP | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Timothy Plan International TPIF [EF] | SP | 04/6/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF] | SP | 03/8/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF] | SP | 03/28/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF] | SP | 04/1/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF] | SP | 04/4/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF] | SP | 10/4/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF] | SP | 04/1/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF] | SP | 04/4/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | SP | 03/8/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | SP | 04/13/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | SP | 04/19/2022 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------|--------------------|-------------------------------------|
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | SP | 04/20/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | SP | 06/27/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | SP | 12/6/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | SP | 08/2/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Alphacentric Income Opp IOFIX [MF] | JT | 02/18/2022 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Alphacentric Income Opp IOFIX [MF] | JT | 04/5/2022 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Alphacentric Income Opp IOFIX [MF] | JT | 04/13/2022 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Alphacentric Income Opp IOFIX [MF] | JT | 04/19/2022 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Alphacentric Income Opp IOFIX [MF] | JT | 04/20/2022 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Alphacentric Income Opp IOFIX [MF] | JT | 06/9/2022 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Alphacentric Income Opp IOFIX [MF] | JT | 06/9/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert EMG Mkts Eq Cl CVMIX [MF] | JT | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|--------------|-------------|-----------------|--------------------|-------------------------------|
| JT Account ⇒ Calvert International COIIX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Capitol Series Tr Fund FTVSX [MF] | JT | 09/16/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Inst ETILX [MF] | JT | 08/3/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Inst ETILX [MF] | JT | 02/17/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Inst ETILX [MF] | JT | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Inst ETILX [MF] | JT | 10/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Healthcare & Life ETIHX [MF] | JT | 10/4/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ ishares o-5 year tips bond (STIP) [EF] | JT | 08/2/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ ishares o-5 year tips bond (STIP) [EF] | JT | 04/7/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ MFST Eventide Core Bond Fund ETIRX [MF] | JT | 02/18/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ MFST Eventide Core Bond Fund ETIRX [MF] | JT | 03/21/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 03/23/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------|---------------------|-------------------------------------|
| MFST Eventide Core Bond Fund ETIRX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 03/24/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| MFST Eventide Core Bond Fund ETIRX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 03/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| MFST Eventide Core Bond Fund ETIRX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 03/28/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| MFST Eventide Core Bond Fund ETIRX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 04/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| MFST Eventide Core Bond Fund ETIRX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 04/5/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| MFST Eventide Core Bond Fund ETIRX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 02/25/2022 | P | \$15,001 - \$50,000 | |
| MFST Eventide Core Bond Fund ETIRX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 02/18/2022 | P | \$1,001 - \$15,000 | |
| Mutual Fund Series Trust EV ETIDX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 02/25/2022 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Mutual Fund Series Trust EV ETIDX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 06/7/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Mutual Fund Series Trust EV ETIDX [MF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 10/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Northern Lights Inspire Cor IBD [EF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ | JT | 03/31/2022 | P | \$15,001 - \$50,000 | |
| Oneascent Core Plus Bond ET OACP [EF] | | | | | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|--------------|-------------|-----------------|---------------------|-------------------------------|
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Oneascent Core Plus Bond ET OACP [EF] | JT | 04/1/2022 | P | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Oneascent Core Plus Bond ET OACP [EF] | JT | 04/4/2022 | P | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Oneascent Core Plus Bond ET OACP [EF] | JT | 08/26/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Oneascent Core Plus Bond ET OACP [EF] | JT | 04/5/2022 | P | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Oneascent Core Plus Bond ET OACP [EF] | JT | 07/28/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ OneAscent Internatonal Equ OAIM [EF] | JT | 09/16/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ OneAscent Large Cap Core ETF OALC [EF] | JT | 02/18/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ OneAscent Large Cap Core ETF OALC [EF] | JT | 06/27/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ OneAscent Large Cap Core ETF OALC [EF] | JT | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton International SISEX [EF] | JT | 09/15/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Timothy Plan High Dividend TPHD [MF] | JT | 06/27/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|--------------|-------------|-----------------|---------------------|-------------------------------|
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Timothy Plan High Dividend TPHD [MF] | JT | 10/4/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Timothy Plan High Dividend TPHD [EF] | JT | 08/2/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Timothy Plan High Yield Bd TPHIX [MF] | JT | 07/25/2022 | P | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Timothy Plan International TPIF [EF] | JT | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Timothy Plan International TPIF [EF] | JT | 04/6/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Timothy Plan International TPIF [EF] | JT | 02/16/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate Term VGIT [EF] | JT | 02/18/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate Term VGIT [EF] | JT | 03/8/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate Term VGIT [EF] | JT | 04/1/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate Term VGIT [EF] | JT | 04/4/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate Term VGIT [EF] | JT | 04/4/2022 | P | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade | JT | 10/4/2022 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------|--------------------|--------------------------|
| JT Account ⇒ Vanguard Mortgage Business VMBS [EF] | | | | | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [EF] | JT | 04/1/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [EF] | JT | 04/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Short Term Treasury VGSH [EF] | JT | 03/8/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Short Term Treasury VGSH [EF] | JT | 04/13/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Short Term Treasury VGSH [EF] | JT | 04/19/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Short Term Treasury VGSH [EF] | JT | 04/20/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Short Term Treasury VGSH [EF] | JT | 12/6/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Short Term Treasury VGSH [EF] | JT | 08/2/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income Opp IOFIX [MF] | | 04/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income Opp IOFIX [MF] | | 04/5/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 04/13/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|----------|---------------------|--------------------------|
| Alphacentric Income Opp IOFIX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 04/19/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Alphacentric Income Opp IOFIX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 04/20/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Alphacentric Income Opp IOFIX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 06/9/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Alphacentric Income Opp IOFIX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Calvert EMG Mkts Eq Cl CVMIX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Calvert International COIIX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 09/16/2022 | P | \$1,001 - \$15,000 | |
| Capitol Series Tr Fund FTVSX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 08/3/2022 | P | \$1,001 - \$15,000 | |
| Eventide Gilead FD Inst ETILX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 02/17/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Eventide Gilead FD Inst ETILX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Eventide Gilead FD Inst ETILX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 10/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Eventide Gilead FD Inst ETILX [MF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 10/4/2022 | P | \$1,001 - \$15,000 | |
| Eventide Healthcare & Life ETIHX [MF] | | | | | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|--------------|-------------|-----------------|---------------------|-------------------------------|
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ ishares o-5 year tips bond (STIP) [EF] | | 08/2/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ MFST Eventide Core Bond Fund ETIRX [MF] | | 03/21/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ MFST Eventide Core Bond Fund ETIRX [MF] | | 03/22/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ MFST Eventide Core Bond Fund ETIRX [MF] | | 03/23/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ MFST Eventide Core Bond Fund ETIRX [MF] | | 03/24/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ MFST Eventide Core Bond Fund ETIRX [MF] | | 03/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ MFST Eventide Core Bond Fund ETIRX [MF] | | 03/28/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ MFST Eventide Core Bond Fund ETIRX [MF] | | 04/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ MFST Eventide Core Bond Fund ETIRX [MF] | | 04/5/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF] | | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF] | | 06/7/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|--------------|-------------|-----------------|---------------------|-------------------------------|
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Northern Lights Inspire Cor IBD [EF] | | 10/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | | 03/31/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | | 04/1/2022 | P | \$15,001 - \$50,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | | 04/4/2022 | P | \$15,001 - \$50,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | | 04/5/2022 | P | \$15,001 - \$50,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Oneascent Core Plus Bond ET OACP [EF] | | 07/28/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ OneAscent Internatonal Equ OAIM [EF] | | 09/16/2022 | P | \$15,001 - \$50,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ OneAscent Large Cap Core ETF OALC [EF] | | 06/27/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ OneAscent Large Cap Core ETF OALC [EF] | | 02/25/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ OneAscent Large Cap Core ETF OALC [EF] | | 10/4/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ SCM Trust Shelton International SISEX [MF] | | 09/15/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade | | 10/4/2022 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|--------------|-------------|-----------------|---------------------|-------------------------------|
| Gary IRA ⇒ Timothy Plan High Dividend TPHD [EF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Timothy Plan High Dividend TPHD [EF] | | 08/2/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Timothy Plan High Dividend TPHD [EF] | | 12/6/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Timothy Plan High Yield Bd TPHIX [MF] | | 07/25/2022 | P | \$15,001 - \$50,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Timothy Plan International TPIF [EF] | | 02/25/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Timothy Plan International TPIF [EF] | | 04/6/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF] | | 03/8/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF] | | 03/28/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF] | | 04/1/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF] | | 04/4/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF] | | 10/4/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ | | 04/1/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|--------------|-------------|-----------------|---------------------|-------------------------------|
| Vanguard Mortgage Business VMBS [EF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF] | | 04/4/2022 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Vanguard Short Term Treasury VGSH [EF] | | | | | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | | 03/8/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | | 04/13/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | | 04/19/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | | 04/20/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | | 06/27/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | | 12/6/2022 | P | \$1,001 - \$15,000 | |
| Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Short Term Treasury VGSH [EF] | | 08/2/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

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

SCHEDULE C: EARNED INCOME

| Source | Type | Amount |
|---------------------------|-------------------------|---------------|
| Fast Appliance Services | Spouse Hourly Part-Time | N/A |
| Baker Lambs & Fine Linens | Spouse Hourly Part-Time | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|--------------|---------------|--|-----------------------|
| JT | Regions Bank | January 2021 | Mortgage - Refinanced our personal residence | \$100,001 - \$250,000 |

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Ameriprise ADP Ann Palmer IRA (Owner: SP)
- Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA (Owner: SP)
- Ameriprise ADP Gary and Ann Palmer Joint (Owner: JT)
LOCATION: US
- Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account (100% Interest) (Owner: JT)
LOCATION: AL, US
- Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account (100% Interest) (Owner: JT)
LOCATION: AL, US
- Ameriprise ADP Gary Palmer Individual IRA
- Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

Yes No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be

disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes No

CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Gary Palmer , 05/8/2023