



Filing ID #10060011

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. April McClain Delaney
Status: Congressional Candidate
State/District: MD06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 02/25/2025
Period Covered: 01/01/2023– 07/14/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|----------------------------|--------------------|-------------------------------|-------------------------|
| Acacia Partners, LP [HE] | JT | \$5,000,001 - \$25,000,000 | Partnership Income | None | \$100,001 - \$1,000,000 |
| Alliance Partners Holdings, LLC [OL] LOCATION: Chevy Chase, MD, US DESCRIPTION: Banking | SP | \$100,001 - \$250,000 | Ordinary Income | None | \$50,001 - \$100,000 |
| American Steadfast, LP (hedge fund) [HE] | JT | \$5,000,001 - \$25,000,000 | Partnership Income | None | \$100,001 - \$1,000,000 |
| Enlightenment Capital Solutions Fund II, LP [HE] DESCRIPTION: private equity in buyout growth | | \$250,001 - \$500,000 | Partnership Income | None | \$100,001 - \$1,000,000 |
| Farallon Capital Partners, LP (hedge fund) [HE] | JT | \$5,000,001 - \$25,000,000 | Partnership Income | None | \$100,001 - \$1,000,000 |
| FFL Executive Partners IV, LP [OT] DESCRIPTION: Private Equity. Fund manager letter on file with the Committee on Ethics. | SP | \$250,001 - \$500,000 | Partnership Income | None | \$50,001 - \$100,000 |

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| Forbright, Inc. [PS] DESCRIPTION: Bank stock | JT | \$25,000,001 - \$50,000,000 | None | | |
| Forbright, Inc., call option [OP] DESCRIPTION: Options | SP | \$1,000,001 - \$5,000,000 | None | | |
| Healthpoint Capital Partners II, LP [HE] DESCRIPTION: private equity in healthcare | JT | \$15,001 - \$50,000 | None | | |
| JPM US Treasury [GS] | JT | \$5,000,001 - \$25,000,000 | Interest | None | \$100,001 - \$1,000,000 |
| Mass Mutual - Whole Life [WU] | SP | \$50,001 - \$100,000 | None | | |
| Notes receivables - Key Bridge Partners LLC, Bethesda, MD [DO] | JT | None | Interest | None | \$15,001 - \$50,000 |
| Pacific West - Checking [BA] | SP | \$50,001 - \$100,000 | None | | |
| Wells Fargo - Checking [BA] | JT | \$500,001 - \$1,000,000 | Interest | None | \$201 - \$1,000 |
| 2015 Insurance Trust ⇒ Mass Mutual, whole life [WU] | | \$500,001 - \$1,000,000 | None | | |
| 2015 Insurance Trust ⇒ Wells Fargo - Checking [BA] | | \$1,001 - \$15,000 | None | | |
| Allstate, variable annuity ⇒ Fixed 1 Year 11/5/22 at 3% [FN] | JT | \$500,001 - \$1,000,000 | None | | |
| Allstate, variable annuity ⇒ Invesco VI S&P 500 Index Port - Series I [MF] | JT | \$250,001 - \$500,000 | None | | |
| Allstate, variable annuity ⇒ Morgan Stanley - VIS Multicap Growth Port - Class X [MF] | JT | \$250,001 - \$500,000 | None | | |
| AMD 09 LLC ⇒ Federated Treasury Obligations Fund - (TOIXX) [GS] | | \$1,000,001 - \$5,000,000 | Dividends | None | \$15,001 - \$50,000 |

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| AMD 09 LLC ⇒ Forbright, Inc. [PS] DESCRIPTION: Bank stock | | \$1,000,001 - \$5,000,000 | None | | |
| AMD 09 LLC ⇒ Wells Fargo, N.A. [BA] | | \$250,001 - \$500,000 | Interest | None | \$2,501 - \$5,000 |
| Cloister Cottage Venture, LLC ⇒ Investment in Residential Property [RP] LOCATION: Sea Island, GA, US | | \$1,000,001 - \$5,000,000 | Rent | None | \$50,001 - \$100,000 |
| Cloister Cottage Venture, LLC ⇒ Investment in Residential Property [RP] LOCATION: Sea Island, GA, US | SP | \$1,000,001 - \$5,000,000 | Rent | None | \$50,001 - \$100,000 |
| Cloister Cottage Venture, LLC ⇒ Wells Fargo - Checking [BA] | SP | \$15,001 - \$50,000 | None | | |
| Cloister Cottage Venture, LLC ⇒ Wells Fargo - Checking [BA] | | \$15,001 - \$50,000 | None | | |
| DC Insurance Trust ⇒ Wells Fargo - Checking [BA] | DC | \$1,001 - \$15,000 | None | | |
| DC Insurance Trust ⇒ Pacific Life ⇒ BlackRock Global Allocation VI Fund III (GAIII) [OT] DESCRIPTION: Mutual Fund | DC | \$50,001 - \$100,000 | None | | |
| DC Insurance Trust ⇒ Pacific Life ⇒ Fidelity VIP Contrafund 2 (IFVCX) [MF] | DC | \$250,001 - \$500,000 | None | | |
| DC Insurance Trust ⇒ Pacific Life ⇒ Fidelity VIP Mid Cap Class 2 [MF] | DC | \$100,001 - \$250,000 | None | | |
| DC Insurance Trust ⇒ Pacific Life ⇒ MFS International Large Cap [MF] | DC | \$100,001 - \$250,000 | None | | |
| DC Insurance Trust ⇒ Pacific Life ⇒ Morgan Stanley PSF Real Estate Portfolio [MF] | DC | \$50,001 - \$100,000 | None | | |
| DC Insurance Trust ⇒ Pacific Life ⇒ PIMCO VIT Global Multi-Asset Managed - Allocation | DC | \$50,001 - \$100,000 | None | | |

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| Advisor Class [MF] | | | | | |
| DC Insurance Trust ⇒ Pacific Life ⇒ Van Eck VIP Global Hard Assets [MF] | DC | \$15,001 - \$50,000 | None | | |
| East Capitol Venture, LLC ⇒ Allspring C&B Large Cap Value Fund-R6 (CBEJX) [MF] | | \$50,001 - \$100,000 | Dividends | None | \$201 - \$1,000 |
| East Capitol Venture, LLC ⇒ Eaton Vance Global Macro Absolute Return Advantage - Class R6 (EGRSX) [MF] | | \$50,001 - \$100,000 | Dividends | None | \$1,001 - \$2,500 |
| East Capitol Venture, LLC ⇒ Federated Treasury Cash Reserves #125 [BA] DESCRIPTION: money market fund | | \$50,001 - \$100,000 | Dividends | None | \$1,001 - \$2,500 |
| East Capitol Venture, LLC ⇒ Invesco Developing Markets Fund Class R6 (ODVIX) [MF] | | \$100,001 - \$250,000 | Dividends | None | \$201 - \$1,000 |
| East Capitol Venture, LLC ⇒ Investment in Residential Property [RP] LOCATION: Washington, DC, US | | \$1,000,001 - \$5,000,000 | Rent | None | \$15,001 - \$50,000 |
| East Capitol Venture, LLC ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF] | | \$15,001 - \$50,000 | Dividends | None | \$201 - \$1,000 |
| East Capitol Venture, LLC ⇒ Lazard Global Listed Infrastructure Ptf Insti Shs (GLIFX) [MF] | | \$50,001 - \$100,000 | Dividends | None | \$1,001 - \$2,500 |
| East Capitol Venture, LLC ⇒ MFS Value Fund Class R6 (MEIKX) [MF] | | \$50,001 - \$100,000 | Dividends | None | \$201 - \$1,000 |
| East Capitol Venture, LLC ⇒ Pimco CommodityRealReturn Strategy Fund Institutional Class (PCRIX) [MF] | | \$50,001 - \$100,000 | Dividends | None | \$201 - \$1,000 |
| East Capitol Venture, LLC ⇒ Principal Funds, Inc. - MidCap Fund, Class R6 (PMAQX) [MF] | | \$100,001 - \$250,000 | None | | |
| East Capitol Venture, LLC ⇒ T. Rowe Price Institutional Floating Rate Fund (RPIFX) [MF] | | \$100,001 - \$250,000 | Dividends | None | \$5,001 - \$15,000 |

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| East Capitol Venture, LLC ⇒ Touchstone Sands Capital Emerging Markets Growth Fund Class R6 (TSRMX) [MF] | | \$100,001 - \$250,000 | None | | |
| East Capitol Venture, LLC ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF] | | \$250,001 - \$500,000 | Dividends | None | \$5,001 - \$15,000 |
| East Capitol Venture, LLC ⇒ Vanguard S&P 500 ETF (VOO) [EF] | | \$500,001 - \$1,000,000 | Dividends | None | \$5,001 - \$15,000 |
| East Capitol Venture, LLC ⇒ Virtus AlphaSimplex Global Alternatives Fund Class R6 (GAFNX) [MF] | | \$50,001 - \$100,000 | Dividends | None | \$1,001 - \$2,500 |
| East Capitol Venture, LLC ⇒ Wells Fargo - Checking [BA] | | \$15,001 - \$50,000 | None | | |
| EVR Investment, LLC ⇒ Eloy Investors LLC [RP] LOCATION: Scottsdale, AZ, US DESCRIPTION: raw land for future development | SP | \$250,001 - \$500,000 | None | | |
| J.P. Morgan - Brokerage ⇒ Federated US Treasury Cash Reserves #125 - money market [BA] | SP | None | Interest | None | \$5,001 - \$15,000 |
| J.P. Morgan - Brokerage ⇒ JPM 100% US Treasury Fund [GS] | SP | \$100,001 - \$250,000 | Interest | None | \$2,501 - \$5,000 |
| J.P. Morgan - Brokerage ⇒ PacWest Bancorp (PACW) [ST] | SP | \$100,001 - \$250,000 | Dividends | None | \$15,001 - \$50,000 |
| J.P. Morgan - Brokerage ⇒ US DOLLAR JPM DEPOSIT SWEEP [BA] | SP | \$100,001 - \$250,000 | Interest | None | \$201 - \$1,000 |
| JKD 09 LLC ⇒ Federated Treasury Obligations Fund - (TOIXX) [GS] | SP | Spouse/DC Over \$1,000,000 | Dividends | None | \$15,001 - \$50,000 |
| JKD 09 LLC ⇒ Forbright, Inc. [PS] DESCRIPTION: Bank stock | SP | Spouse/DC Over \$1,000,000 | None | | |
| | | | | | |

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| JKD 09 LLC ⇒ Wells Fargo, N.A. [BA] | SP | \$500,001 - \$1,000,000 | Interest | None | \$2,501 - \$5,000 |
| Mazara, LLC ⇒ Investment in Real Property [RP] LOCATION: Cabo, San Lucas, MX | SP | \$250,001 - \$500,000 | Rent | None | \$50,001 - \$100,000 |
| Parkglen, LLC ⇒ Demand loan to family member [DO] DESCRIPTION: Dependent Child #1 | DC | \$250,001 - \$500,000 | Interest | None | \$2,501 - \$5,000 |
| Parkglen, LLC ⇒ Demand loan to family member [DO] DESCRIPTION: Dependent Child #2 | DC | \$250,001 - \$500,000 | Interest | None | \$2,501 - \$5,000 |
| Parkglen, LLC ⇒ Wells Fargo - Checking [BA] DESCRIPTION: Dependent Child #1 | DC | \$1,001 - \$15,000 | None | | |
| Parkglen, LLC ⇒ Wells Fargo - Checking [BA] DESCRIPTION: Dependent Child #2 | DC | \$1,001 - \$15,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Acacia Partners, LP [HE] | DC | Spouse/DC Over \$1,000,000 | Partnership Income | None | \$100,001 - \$1,000,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Alliance Partners Holdings, LLC [OL] LOCATION: Chevy Chase, MD, US DESCRIPTION: Banking | DC | \$250,001 - \$500,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ American Steadfast, LP [HE] | DC | Spouse/DC Over \$1,000,000 | Partnership Income | None | \$100,001 - \$1,000,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab Bank [BA] | DC | \$250,001 - \$500,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Demand loan to family member [DO] | DC | \$250,001 - \$500,000 | None | | |

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| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Enlightenment Capital Solutions Fund II, LP [HE] DESCRIPTION: private equity in buyout growth | DC | \$15,001 - \$50,000 | Partnership Income | None | \$100,001 - \$1,000,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Enlightenment Capital Solutions Fund III, LP [HE] DESCRIPTION: private equity in buyout growth | DC | \$100,001 - \$250,000 | Partnership Income | None | \$50,001 - \$100,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Enlightenment Capital Solutions Fund IV, LP [HE] DESCRIPTION: pooled investment fund | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Forbright, Inc. [PS] DESCRIPTION: Bank stock | DC | \$100,001 - \$250,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Galvanize Innovation & Expansion Fund I, LP (HCP SPV) [OT] DESCRIPTION: private equity | DC | \$100,001 - \$250,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ GPC Partners Co-Investment (Chico), LP [OT] DESCRIPTION: pooled investment fund | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ HCP Private Equity Fund IX, LP [OT] DESCRIPTION: private equity | DC | \$250,001 - \$500,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ HCP Private Equity Fund VII, LP [OT] DESCRIPTION: private equity | DC | \$250,001 - \$500,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ HCP Private Equity Fund VIII, LP [OT] DESCRIPTION: private equity | | Spouse/DC Over \$1,000,000 | None | | |

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| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Healthpoint Capital Partners II, LP [HE] | DC | \$1,001 - \$15,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Hellman & Friedman Capital Partners IX, LP [OT] DESCRIPTION: private equity | DC | \$1,000,001 - \$5,000,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Mulberry Street [OT] DESCRIPTION: Mutual Fund | DC | \$1,000,001 - \$5,000,000 | Dividends | None | \$100,001 - \$1,000,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Oakmark International Fund Investor Class (OAKIX) [MF] | DC | \$500,001 - \$1,000,000 | Dividends | None | \$50,001 - \$100,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Ponderosa Ventures Fund I [OT] DESCRIPTION: private equity | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Revolution Growth GP IV, LP [OT] DESCRIPTION: venture capital fund | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Money Market [BA] | DC | \$100,001 - \$250,000 | Interest | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Zephyr AI [PS] DESCRIPTION: high-growth healthcare technology company | DC | \$100,001 - \$250,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Bio-Techne Corp (TECH) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ | DC | \$50,001 - \$100,000 | Dividends | None | \$1,001 - \$2,500 |

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| Brown & Brown, Inc. (BRO) [ST] | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Ceridian HCM Holding Inc. (CDAY) [ST] | DC | \$50,001 - \$100,000 | Capital Gains | None | \$5,001 - \$15,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Clean Harbors, Inc. (CLH) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Core & Main, Inc. Class A Common Stock (CNM) [ST] | DC | \$15,001 - \$50,000 | Capital Gains | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST] | DC | \$15,001 - \$50,000 | Capital Gains | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ ITT Inc. Common Stock (ITT) [ST] | DC | \$1,001 - \$15,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Live Nation Entertainment, Inc. Common Stock (LYV) [ST] | DC | \$15,001 - \$50,000 | Capital Gains | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Martin Marietta Materials, Inc. Common Stock (MLM) [ST] | DC | \$50,001 - \$100,000 | Capital Gains, Dividends | None | \$5,001 - \$15,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Morningstar, Inc. - Common Stock (MORN) [ST] | DC | \$50,001 - \$100,000 | Capital Gains, Dividends | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ MSA Safety Incorporated Common Stock (MSA) [ST] | DC | \$15,001 - \$50,000 | None | | |

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| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Paychex, Inc. - Common Stock (PAYX) [ST] | DC | \$15,001 - \$50,000 | Dividends | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Pool Corporation - Common Stock (POOL) [ST] | DC | \$1,001 - \$15,000 | Capital Gains, Dividends | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ PTC Inc. - Common Stock (PTC) [ST] | DC | \$1,001 - \$15,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Revvity, Inc. Common Stock (RVTY) [ST] DESCRIPTION: F/K/A PerkinElmer, Inc. | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Rollins, Inc. Common Stock (ROL) [ST] | DC | \$15,001 - \$50,000 | Capital Gains | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Service Corporation International Common Stock (SCI) [ST] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Signet Jewelers Limited Common Shares (SIG) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ STERIS plc (STE) [ST] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Tempur Sealy International, Inc. Common Stock (TPX) [ST] | DC | \$50,001 - \$100,000 | Dividends | None | \$201 - \$1,000 |

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| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ The Duckhorn Portfolio, Inc. Common Stock (NAPA) [ST] | DC | \$1,001 - \$15,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ The Middleby Corporation - Common Stock (MIDD) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Toro Company (TTC) [ST] | DC | \$15,001 - \$50,000 | Dividends | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Tractor Supply Company - Common Stock (TSCO) [ST] | DC | \$1,001 - \$15,000 | Capital Gains, Dividends | None | \$2,501 - \$5,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Trimble Inc. - Common Stock (TRMB) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond [GS] | DC | \$1,000,001 - \$5,000,000 | Interest | None | \$15,001 - \$50,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 1/03/2023) [GS] | DC | None | Interest | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 1/12/2023) [GS] | DC | None | Interest | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 2/16/2023) [GS] | DC | None | Interest | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family | DC | None | Interest | None | \$1,001 - |

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| Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 2/2/2023) [GS] | | | | | \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 3/23/2023) [GS] | DC | None | Interest | None | \$2,501 - \$5,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 3/9/2023) [GS] | DC | None | Interest | None | \$2,501 - \$5,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Vail Resorts, Inc. Common Stock (MTN) [ST] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Westinghouse Air Brake Technologies Corporation Common Stock (WAB) [ST] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Anne Arundel Cnty MD; 5%; Due 10/1/2028 [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore Cnty MD Consol Public Impt 5%; Due 3/1/2027 [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore, MD Revenue Wastewater Series B [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Brunswick, MD, bond [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------|----------------|-------------------------------|-----------------------|
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Connecticut St Health & Educational Ser-L [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Illinois State, bond [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Indianapolis, IN Local Public, bond [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Department of Transportation - 5%; Due 12/1/2028 [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Health & Higher Educational [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State, bond [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Montgomery County, MD, bond [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Pennsylvania St Turnpike Ser A; 4%; Due 12/1/2028 [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|----------------------------|--------------------|-------------------------------|-------------------------|
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond; 4%; Due 7/1/2032 [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Providence, RI, bond [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ University Systems of Maryland Auxiliary [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Washington, MD Suburban Sanitary District [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Worcester County, MD, bond [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Acacia Partners, LP [HE] | DC | \$1,000,001 - \$5,000,000 | Partnership Income | None | \$100,001 - \$1,000,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Alliance Partners Holdings, LLC [OL] LOCATION: Chevy Chase, MD, US DESCRIPTION: Banking | DC | \$250,001 - \$500,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ American Steadfast, LP [HE] | DC | Spouse/DC Over \$1,000,000 | Partnership Income | None | \$100,001 - \$1,000,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab Bank [BA] | DC | \$250,001 - \$500,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Demand loan to family member [DO] | DC | \$250,001 - \$500,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|----------------------------|--------------------|-------------------------------|-------------------------|
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Enlightenment Capital Solutions Fund II, LP [HE] DESCRIPTION: private equity in buyout growth | DC | \$15,001 - \$50,000 | Partnership Income | None | \$100,001 - \$1,000,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Enlightenment Capital Solutions Fund III, LP [HE] DESCRIPTION: private equity in buyout growth | DC | \$100,001 - \$250,000 | Partnership Income | None | \$50,001 - \$100,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Enlightenment Capital Solutions Fund IV, LP [HE] DESCRIPTION: pooled investment fund | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Forbright, Inc. [PS] DESCRIPTION: Bank stock | DC | \$100,001 - \$250,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Galvanize Innovation & Expansion Fund I, LP (HCP SPV) [OT] DESCRIPTION: private equity | DC | \$250,001 - \$500,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ GPC Partners Co-Investment (Chico), LP [OT] DESCRIPTION: pooled investment fund | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ HCP Private Equity Fund IX, LP [OT] DESCRIPTION: private equity | DC | \$250,001 - \$500,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ HCP Private Equity Fund VII, LP [OT] DESCRIPTION: private equity | DC | \$250,001 - \$500,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ HCP Private Equity Fund VIII, LP [OT] | | Spouse/DC Over \$1,000,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|----------------------------|----------------|-------------------------------|-------------------------|
| DESCRIPTION: private equity | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Healthpoint Capital Partners II, LP [HE] | DC | \$1,001 - \$15,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Hellman & Friedman Capital Partners IX, LP [OT] | DC | \$1,000,001 - \$5,000,000 | None | | |
| DESCRIPTION: private equity | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Mulberry Street [OT] | DC | Spouse/DC Over \$1,000,000 | Dividends | None | \$100,001 - \$1,000,000 |
| DESCRIPTION: Mutual Fund | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Oakmark International Fund Investor Class (OAKIX) [MF] | DC | \$500,001 - \$1,000,000 | Dividends | None | \$50,001 - \$100,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Ponderosa Ventures Fund I [OT] | DC | \$15,001 - \$50,000 | None | | |
| DESCRIPTION: private equity | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Revolution Growth GP IV, LP [OT] | DC | \$15,001 - \$50,000 | None | | |
| DESCRIPTION: venture capital fund | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Money Market [BA] | DC | \$100,001 - \$250,000 | Interest | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Zephyr AI [PS] | DC | \$100,001 - \$250,000 | None | | |
| DESCRIPTION: high-growth healthcare technology company | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Bio-Techne Corp - Common Stock (TECH) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family | DC | \$50,001 - | Dividends | None | \$1,001 - |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|--------------|-----------------------|--------------------------|--------------------------------------|------------------------------|
| Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST] | | \$100,000 | | | \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Ceridian HCM Holding Inc. (CDAY) [ST] | DC | \$50,001 - \$100,000 | Capital Gains | None | \$5,001 - \$15,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Clean Harbors, Inc. Common Stock (CLH) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Core & Main, Inc. Class A Common Stock (CNM) [ST] | DC | \$15,001 - \$50,000 | Capital Gains | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST] | DC | \$15,001 - \$50,000 | Capital Gains | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ ITT Inc. Common Stock (ITT) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Live Nation Entertainment, Inc. Common Stock (LYV) [ST] | DC | \$15,001 - \$50,000 | Capital Gains | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Martin Marietta Materials, Inc. Common Stock (MLM) [ST] | DC | \$50,001 - \$100,000 | Capital Gains, Dividends | None | \$5,001 - \$15,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Morningstar, Inc. - Common Stock (MORN) [ST] | DC | \$50,001 - \$100,000 | Capital Gains, Dividends | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - | DC | \$15,001 - \$50,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|----------------------|--------------------------|-------------------------------|-----------------------|
| Brokerage #1 ⇒ MSA Safety Incorporated Common Stock (MSA) [ST] | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Paychex, Inc. - Common Stock (PAYX) [ST] | DC | \$50,001 - \$100,000 | Dividends | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Pool Corporation - Common Stock (POOL) [ST] | DC | \$1,001 - \$15,000 | Capital Gains, Dividends | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ PTC Inc. - Common Stock (PTC) [ST] | DC | \$1,001 - \$15,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Revvity, Inc. Common Stock (RVTY) [ST] DESCRIPTION: F/K/A PerkinElmer, Inc. | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Rollins, Inc. Common Stock (ROL) [ST] | DC | \$15,001 - \$50,000 | Capital Gains | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Service Corporation International Common Stock (SCI) [ST] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Signet Jewelers Limited Common Shares (SIG) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ STERIS plc (STE) [ST] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - | DC | \$50,001 - \$100,000 | Dividends | None | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|--------------|---------------------------|--------------------------|--------------------------------------|------------------------------|
| Brokerage #1 ⇒ Tempur Sealy International, Inc. Common Stock (TPX) [ST] | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ The Duckhorn Portfolio, Inc. Common Stock (NAPA) [ST] | DC | \$1,001 - \$15,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ The Middleby Corporation - Common Stock (MIDD) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Toro Company (TTC) [ST] | DC | \$15,001 - \$50,000 | Dividends | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Tractor Supply Company - Common Stock (TSCO) [ST] | DC | \$1,001 - \$15,000 | Capital Gains, Dividends | None | \$2,501 - \$5,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Trimble Inc. - Common Stock (TRMB) [ST] | DC | \$15,001 - \$50,000 | None | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond [GS] | DC | \$1,000,001 - \$5,000,000 | Interest | None | \$15,001 - \$50,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 1/03/2023) [GS] | DC | None | Interest | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 1/12/2023) [GS] | DC | None | Interest | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ | DC | None | Interest | None | \$1,001 - \$2,500 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|--------------|-----------------------|--------------------------|--------------------------------------|------------------------------|
| U.S. Treasury bond (Due 2/16/2023) [GS] | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 2/2/2023) [GS] | DC | None | Interest | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 3/23/2023) [GS] | DC | None | Interest | None | \$2,501 - \$5,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond (Due 3/9/2023) [GS] | DC | None | Interest | None | \$2,501 - \$5,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Vail Resorts, Inc. Common Stock (MTN) [ST] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Westinghouse Air Brake Technologies Corporation Common Stock (WAB) [ST] | DC | \$15,001 - \$50,000 | Capital Gains, Dividends | None | \$1,001 - \$2,500 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Anne Arundel Cnty MD; 5%; Due 10/1/2028 [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore Cnty MD Consol Public Impt 5%; Due 3/1/2027 [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore, MD Revenue Wastewater Series B [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|---------------------|----------------|-------------------------------|-----------------------|
| #2 ⇒ Brunswick, MD, bond [GS] | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Connecticut St Health & Educational Ser-L [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Illinois State, bond [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Indianapolis, IN Local Public, bond [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Department of Transportation 5%; Due 12/1/2028 [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Health & Higher Educational [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State, bond [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Montgomery County, MD, bond [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Pennsylvania St Turnpike Ser A; 4%; Due 12/1/2028 [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|----------------------------|----------------|-------------------------------|-------------------------|
| #2 ⇒ Prince George's County, MD, bond [GS] | | | | | |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond; 4%; Due 7/1/2032 [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Providence, RI, bond [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ University Systems of Maryland Auxiliary [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Washington, MD Suburban Sanitary District [GS] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Worcester County, MD, bond [GS] | DC | \$1,001 - \$15,000 | Interest | None | \$201 - \$1,000 |
| TLM Trust ⇒ Wells Fargo - Checking [BA] | | \$15,001 - \$50,000 | None | | |
| WB Trust ⇒ Wells Fargo - Checking [BA] | DC | \$15,001 - \$50,000 | Interest | None | \$201 - \$1,000 |
| Wells Fargo - Brokerage #1 ⇒ Allspring 100% Treasury Money Market [BA] | JT | \$5,000,001 - \$25,000,000 | Interest | None | \$100,001 - \$1,000,000 |
| Wells Fargo - Brokerage #1 ⇒ Anne Arundel County, MD Special Obligation - Refunding National Business Park [GS] DESCRIPTION: DTD 06/07/18 5.00% 07/01/2025 | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| Wells Fargo - Brokerage #1 ⇒ BALTIMORE MD PROJ REVENUE SUB-WST WTR PROJ-SER A [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$2,501 - \$5,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|----------------|-------------------------------|-----------------------|
| DESCRIPTION: DTD 02/09/17 5.00% 07/01/2025 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Black Belt Energy Gas Dist AL Ser D1 [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$2,501 - \$5,000 |
| DESCRIPTION: DTD 7/1/22; Due 7/1/2052 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Cecil County, MD, bond [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| DESCRIPTION: DTD 12/14/17 5.00% 08/01/2028 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Charles County, MD, bond [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| DESCRIPTION: DTD 09/30/14 5.00% 10/01/2024 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Howard County, MD, bond [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| DESCRIPTION: DTD 03/30/16 5.00% 02/15/2024 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ JEA FL WTR & SWR REVENUE VAR-SER A-2 [GS] | JT | None | Interest | None | \$201 - \$1,000 |
| DESCRIPTION: DTD 12/28/10; Due 10/01/2042 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Johnson & Miami County, bond [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$1,001 - \$2,500 |
| DESCRIPTION: DTD 03/01/21 1.28% 09/01/2028 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Kaufman County, TX, bond [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| DESCRIPTION: DTD 09/01/16 4.00% 02/15/2026 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Kentucky Cnty TX Road, bond [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| DESCRIPTION: DTD 02/08/17 5.00% 04/01/2031 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Manhattan KS Ref- Ser-A [GS] | JT | \$50,001 - \$100,000 | Interest | None | \$2,501 - \$5,000 |
| DESCRIPTION: DTD 06/05/23 5.00% 11/01/2026 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Maryland St First Series [GS] | JT | \$50,001 - \$100,000 | Interest | None | \$1,001 - \$2,500 |
| DESCRIPTION: DTD 06/22/16 4.00% 06/01/2030 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Maryland St Stadium Auth Revenue Ser A [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$2,501 - \$5,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|----------------|-------------------------------|-----------------------|
| DESCRIPTION: DTD 07/06/23 5.00% 03/01/2032 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Maryland State Department of Transportation [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| DESCRIPTION: DTD 10/22/20 5.00% 10/01/2025 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Maryland State Health & Higher Educational - Ref-Peninsula Regional Health [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$2,501 - \$5,000 |
| DESCRIPTION: DTD 05/13/20 5.00% 07/01/2029 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Montgomery County, MD Ref-Ser B [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$2,501 - \$5,000 |
| DESCRIPTION: DTD 08/05/20 4.00% 11/01/2024 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ New Jersey Educational Fac Aut Rev Ser A [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| DESCRIPTION: DTD 04/05/22 5.00% 07/01/2029 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Prince George's County, MD Cops Hampton Park [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$2,501 - \$5,000 |
| DESCRIPTION: DTD 06/06/19 5.00% 10/01/2028 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ University System of Maryland Auxiliary Facility and Tuition Rev bond [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| DESCRIPTION: DTD 02/24/21 5.00% 04/01/2030 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Vanguard Limited-Term Tax-Exempt Fund (VMLUX) [MF] | JT | \$15,001 - \$50,000 | None | | |
| Wells Fargo - Brokerage #1 ⇒ Washington MD Suburban San Dis Cons Public Impt [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$2,501 - \$5,000 |
| DESCRIPTION: DTD 04/29/14 4.00% 06/01/2039 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Washington State Health Care Facilities, bond [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| DESCRIPTION: DTD 08/21/19 5.00% 08/01/2026 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ Washington Suburban Sanitary District, MD, [GS] | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| DESCRIPTION: DTD 12/02/14 4.00% 06/01/2025 | | | | | |
| Wells Fargo - Brokerage #1 ⇒ | JT | \$100,001 - | Interest | None | \$2,501 - |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-------------------------|----------------|-------------------------------|-----------------------|
| Wicomico County, MD, bond [GS] DESCRIPTION: DTD 11/03/15 5.00% 11/01/2024 | | \$250,000 | | | \$5,000 |
| Wells Fargo - Brokerage #1 ⇒ Worcester Cnty MD Consol Public Impt [GS] DESCRIPTION: DTD 04/16/19 5.00% 08/01/2029 | JT | \$100,001 - \$250,000 | Interest | None | \$5,001 - \$15,000 |
| Wells Fargo - Brokerage #2 ⇒ Indiabulls Real Estate Ltd Sponsored GDR Reg S (real estate) [OT] DESCRIPTION: ADR stock | JT | \$15,001 - \$50,000 | None | | |
| Wells Fargo - Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF] | SP | \$500,001 - \$1,000,000 | Tax-Deferred | | |
| Wells Fargo - Roth IRA ⇒ Virtus Tactical AllocationFund Class A (NAINX) [MF] | SP | \$50,001 - \$100,000 | Tax-Deferred | | |
| Wells Fargo - Roth IRA ⇒ Wells Fargo - Cash [IH] | SP | \$15,001 - \$50,000 | Tax-Deferred | | |
| Wells Fargo - Roth IRA ⇒ Wells Fargo Money Market Fund Class A Shares (STGXX) [MF] DESCRIPTION: Money Market | | \$50,001 - \$100,000 | Tax-Deferred | | |

* 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

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|-----------------|---------------|-------------------------------|-----------------------|
| Forbright, Inc. | Spouse Salary | N/A | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|---------------------------------------|---------------|---------------------------------------|---------------------------|
| JT | Family Investments LLC - Family Trust | 2011 | Investment Loan | \$1,000,001 - \$5,000,000 |
| JT | St. Simons Bank & Trust | 2021 | Mortgage (investment/rental property) | \$1,000,001 - |

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-------------|---------------|----------------|---------------------------|
| | | | | \$5,000,000 |
| | Wells Fargo | December 2023 | Portfolio Loan | \$1,000,001 - \$5,000,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|------------------------------------|---|
| Investment Manager | AMD 09 LLC |
| Member | Northwestern University Board of Trustees |
| Managing Member | East Capitol Venture, LLC |
| Washington Director & Board Member | Common Sense Media |
| COMMENTS: Resigned January 2022 | |
| Member | Delaney Charitable Foundation |

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Wells Fargo - Roth IRA
- Wells Fargo - Roth IRA (Owner: SP)
- J.P. Morgan - Brokerage (Owner: SP)
- Wells Fargo - Brokerage #1 (Owner: JT)
- Wells Fargo - Brokerage #2 (Owner: JT)
- EVR Investment, LLC (Owner: SP)
LOCATION: US
- Mazara, LLC (Owner: SP)
LOCATION: US
- Allstate, variable annuity (Owner: JT)
- TLM Trust
- DC Insurance Trust (Owner: DC)
- 2015 Insurance Trust

- WB Trust (Owner: DC)
- JKD 09 LLC (Owner: SP)
LOCATION: US
- AMD 09 LLC
LOCATION: US
- DC Insurance Trust ⇒ Pacific Life (Owner: DC)
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 (25% Interest) (Owner: DC)
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 (25% Interest) (Owner: DC)
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 (Owner: DC)
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 (Owner: DC)
- Parkglen, LLC (Owner: DC)
LOCATION: US
- Parkglen, LLC (Owner: DC)
LOCATION: US
- East Capitol Venture, LLC
LOCATION: US
- Cloister Cottage Venture, LLC (50% Interest) (Owner: SP)
LOCATION: US
- Cloister Cottage Venture, LLC (50% Interest)
LOCATION: US
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 (Owner: DC)
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 (Owner: DC)
- SBLG Family Investments, LLC (Owner: DC)
LOCATION: US

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. April McClain Delaney , 02/25/2025