



Filing ID #10046846

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Peter Welch
Status: Member
State/District: VToo

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Century ⇒ American Century High Yield Fund (ABHIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
American Century ⇒ American Century International Growth Fund (TWIEX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
American Century ⇒ American Century Real Estate Fund (REACX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Agilent Technologies, Inc. (A) [ST]	None		Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ Autodesk [CS]	None		None		<input checked="" type="checkbox"/>
DESCRIPTION: 9.15.22 3.6%					
Charles Schwab - Brokerage ⇒ Cerner Corporation (CERN) [ST]	None		Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ Charles Schwab Government Money Fund (SNVXX) [MF]		\$50,001 - \$100,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab - Brokerage ⇒ Charles Schwab Value Advantage Money Market [MF]		\$250,001 - \$500,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Church & Dwight Company, Inc. (CHD) [ST]		None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ Cisco Systems, Inc. (CSCO) [ST]		None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ Cloetta AB [PS]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Cloetta AB, CLOEF					
Charles Schwab - Brokerage ⇒ Fidelity Contrafund Fund (FCNTX) [MF]		\$50,001 - \$100,000	Capital Gains	\$5,001 - \$15,000	<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ General Electric Company (GE) [ST]		None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ iShares Global Comm Services ETF (IXP) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Kubota Corporation (KUBTY) [ST]		None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ Kyocera Corp Ordinary Shares (KYOCF) [ST]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ Mitek Systems, Inc. (MITK) [ST]		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ Parnassus Core Equity Fund (PRBLX) [MF]		\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ PayPal Holdings, Inc. (PYPL) [ST]		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: 2.40% due 10/1/24					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab - Brokerage ⇒ Qualcomm Inc. [CS]	None		Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: 5.20.22 3%					
Charles Schwab - Brokerage ⇒ SwedenCare AB [OT]	None		Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Location: US Description: Traded on Stockholm Stock Exchange					
Charles Schwab - Brokerage ⇒ Tennant Company (TNC) [ST]	None		Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ U.S. Bancorp (USB) [ST]	None		Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ Unilever NV (UN) [ST]	None		Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ University of Vermont [CS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: 10.1.31 3.5%					
Charles Schwab - Brokerage ⇒ US Treasury Note [GS]	None		Capital Gains, Interest	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: 2.75%, 8/15/21; Fully matured					
Charles Schwab - Brokerage ⇒ Vaisala Oy Ordinary Shares -A- (VAAIF) [ST]	None		Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ Vanguard FTSE Pacific ETF (VPL) [EF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage ⇒ Vermont Municipal Bond [GS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: 12.1.31 5%					
Charles Schwab - Brokerage ⇒ Wells Fargo & Company (WFC) [ST]	None		Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Charles Schwab - Contributory IRA ⇒ Charles Schwab Government Money Fund (SNVXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Contributory IRA ⇒ Charles Schwab Value Advantage Money Market [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab - Contributory IRA ⇒ Fidelity Contrafund Fund (FCNTX) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Contributory IRA ⇒ iShares Global Comm Services ETF (IXP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Contributory IRA ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Contributory IRA ⇒ Parnassus Core Equity Fund (PRBLX) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Contributory IRA ⇒ Vanguard FTSE Pacific ETF (VPL) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Charles Schwab - Inherited IRA ⇒ Charles Schwab Government Money Fund (SNVXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Inherited IRA ⇒ Charles Schwab Value Advantage Money Market [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Inherited IRA ⇒ Fidelity Contrafund Fund (FCNTX) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Inherited IRA ⇒ iShares Global Comm Services ETF (IXP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Inherited IRA ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Inherited IRA ⇒ Parnassus Core Equity Fund (PRBLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Inherited IRA ⇒ Vanguard FTSE Pacific ETF (VPL) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ Fidelity Balanced Fund (FBALX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Fidelity Blue Chip Growth Fund (FBGRX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ Fidelity Contrafund Fund (FCNTX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity - Traditional IRA ⇒ Fidelity Convertible Securities Fund (FCVSX) [MF]		\$100,001 - \$250,000		Tax-Deferred	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Fidelity Select IT Services (FBSOX) [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ Fidelity Telecom & Utilities Fund (FIUIX) [MF]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Health Care Select Sector SPDR (XLV) [EF]		\$100,001 - \$250,000		Tax-Deferred	<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ Industrial Select Sector SPDR (XLI) [EF]		\$100,001 - \$250,000		Tax-Deferred	<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ Invesco Exchange Traded Fund TR S&P (XSVM) [EF]		\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ Invesco Oppenheimer Global Opportunities Fund (OPGIX) [MF]		\$100,001 - \$250,000		Tax-Deferred	<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ Invesco S&P SmallCap Health Care ETF (PSCH) [EF]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ iShares Inc. iShares MSCI Brazil ETF (EWZ) [EF]		\$100,001 - \$250,000		Tax-Deferred	<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ iShares Mexico (EWW) [EF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ iShares Russell 2000 ETF (IWN) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Previously reported as iShares Russell 2000 ETF (IWM)					
Fidelity - Traditional IRA ⇒ iShares S&P US Preferred Stock Index (PFF) [EF]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity - Traditional IRA ⇒ Select SPDR Materials (XLB) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ SPDR Bloomberg Barclays High Yield Bond (JNK) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ SPDR Real Estate Select Sector (XLRE) [EF]		\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ VanEck Vectors Fallen Angel High Yield Bond (ANGL) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ VanEck Vectors TR Vietnam ETF (VNM) [EF]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased & sold in 2021					
Fidelity - Traditional IRA ⇒ Vanguard Dividend Appreciation (VIG) [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Vanguard Global Capital Cycles Fund (VGPMX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity - Traditional IRA ⇒ Vanguard S&P Small-Cap 600 Value ETF (VIOV) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Vanguard Total Stock Market Index (VTSAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Share class exchange - previously reported as VTSMX					
Fidelity Brokerage #1 ⇒ Fidelity Capital & Income Fund (FAGIX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒		\$100,001 -	Capital Gains	\$5,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Contrafund Fund (FCNTX) [MF]		\$250,000		\$15,000	
Fidelity Brokerage #1 ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Fidelity Brokerage #1 ⇒ Fidelity Growth Company (FDGRX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒ Fidelity Total Bond Fund (FTBFX) [MF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒ iShares 20 year Treasury (TLT) [EF]		None	None		<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒ iShares Inc iShares MSCI Taiwan ETF (EWT) [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒ iShares Inc. iShares MSCI Brazil ETF (EWZ) [EF]		\$100,001 - \$250,000	None		<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒ iShares MSCI Emerging Markets Asia ETF (EEMA) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒ SPDR Bloomberg Barclays Capital Convertible (CWB) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Brokerage #1 ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒ Vanguard Europe (VGK) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Brokerage #1 ⇒ Vanguard Whitehall FDS High Div Yield (VYM) [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Brokerage #2 ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Brokerage #2 ⇒ Fidelity Municipal Money Market Fund (FTEXX) [MF]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fidelity Brokerage #2 ⇒ iShares Emerging Markets (EEM) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Brokerage #2 ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #2 ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Aberdeen Standard Bloomberg All Commodity Strategy K-1 Free ETF (BCI) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Consumer Discretionary Select Sector SPDR (XLY) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Exxon Mobil Corporation (XOM) [ST]	SP	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Sold for a loss					
Spinnaker Trust - Brokerage ⇒ First Trust Preferred Securities and Income ETF ETF (FPE) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ General Electric Company (GE) [ST]	SP	None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Goldman Sachs ActiveBeta Emerging Markets Equity ETF (GEM) [EF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Health Care Select Sector SPDR (XLV) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Industrial Select Sector SPDR (XLI) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ International Business Machines Corporation (IBM) [ST]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Invesco Russell 1000 Dynamic (OMFL) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ETF (RCD) [EF]					
Spinnaker Trust - Brokerage ⇒ iShares 10+ Year Inv Grade Corp Bond ETF (IGLB) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares Barclays 10-20 Year Treasury Bond Fund (TLH) [EF]	SP	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares Core 1-5 Year Bond (ISTB) [EF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares Core Total Year USD Bond ETF (IUSB) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares Global Clean Energy (ICLN) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares Gold Trust (IAU) [EF]	SP	\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares Inc iShares MSCI Taiwan ETF (EWT) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares J.P. Morgan EM Local Currency Bond (LEMB) [EF]	SP	None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares MSCI China A (CNYA) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ JPMorgan BetaBuilders Canada ETF (BBCA) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ KraneShares Bosera MSCI China A ETF (KBA) [EF]	SP	None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒	SP	None	Capital Gains	\$5,001 -	<input checked="" type="checkbox"/>

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KraneShares CSI China Internet ETF (KWEB) [EF]				\$15,000	
Spinnaker Trust - Brokerage ⇒ KraneShares Global Carbon (KRBN) [EF]	SP	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ SPDR Blackstone GSO Senior Loan (SRLN) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ SPDR Portfolio S&P 600 Small Cap ETF (SPSM) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Spinnaker Total Cash & Cash Equivalents [BA]	SP	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Technology Select Sector SPDR Fund (XLK) [EF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Union Pacific Corporation (UNP) [ST]	SP	None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ VanEck Vectors Gold Miners (GDX) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
TD Ameritrade - Brokerage ⇒ iShares Latin America (ILF) [EF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
TD Ameritrade - Brokerage ⇒ Select SPDR Materials (XLB) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade - Brokerage ⇒ Select SPDR Technology (XLK) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TD Ameritrade - Brokerage ⇒ TD Ameritrade Money Market [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
TD Ameritrade - Brokerage ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ TIAA CREF Equity Index R3 [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA ⇒ TIAA CREF Global Equities R3 [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA ⇒ TIAA CREF Growth R3 [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA ⇒ TIAA CREF High Yield Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA ⇒ TIAA CREF Large-Cap Value Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA ⇒ TIAA CREF Money Market R3 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA ⇒ TIAA CREF Quant Small-Cap Equity Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA ⇒ TIAA CREF Social Choice R3 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA ⇒ TIAA Real Estate [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA ⇒ TIAA Traditional [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA ⇒ TIAA-CREF Real Estate Securities Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard - Brokerage ⇒ Vanguard Intermediate-Term Tax-Exempt Fund Admiral Shares (VWIUX) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard - Brokerage ⇒		\$50,001 -	Dividends	\$1,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Long-Term Tax-Exempt Fund Admiral Shares (VWLUX) [EF]		\$100,000		\$2,500	<input type="checkbox"/>
Vanguard - Brokerage ⇒ Vanguard Total International Stock ETF (VXUS) [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard - Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Welch Account ⇒ First American Government Obligations Fund [MF]		None		None	<input type="checkbox"/>
Welch Account ⇒ Perkinelmer [CS]		None		None	<input type="checkbox"/>
DESCRIPTION: 11.15.21 5%; Fully matured					

* 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?
Charles Schwab - Brokerage ⇒ Vanguard Pacific Stock (VPL) [EF]		01/4/2021	P	\$15,001 - \$50,000	<input type="checkbox"/>
Charles Schwab - Contributory IRA ⇒ Vanguard Pacific Stock (VPL) [EF]		01/4/2021	P	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab - Inherited IRA ⇒ Vanguard Pacific Stock (VPL) [EF]		01/4/2021	P	\$1,001 - \$15,000	<input type="checkbox"/>
Exxon Mobil Corporation (XOM) [ST]	SP	09/17/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Sub holding of Spinnaker Trust - Brokerage COMMENTS: Spouse inherited the stock from her mother					
Fidelity - Traditional IRA ⇒ Fidelity Blue Chip Growth Fund (FBGRX) [MF]		03/8/2021	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Fidelity Select IT Services (FBSOX) [MF]		03/8/2021	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒		08/11/2021	P	\$100,001 -	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Health Care Select Sector SPDR (XLV) [EF]				\$250,000	
Fidelity - Traditional IRA ⇒ Industrial Select Sector SPDR (XLI) [EF]		02/4/2021	P	\$100,001 - \$250,000	
Fidelity - Traditional IRA ⇒ Industrial Select Sector SPDR (XLI) [EF]		03/9/2021	P	\$50,001 - \$100,000	
Fidelity - Traditional IRA ⇒ Invesco Exchange Traded Fund TR S&P (XSVM) [EF]		06/10/2021	P	\$50,001 - \$100,000	
Fidelity - Traditional IRA ⇒ Invesco Oppenheimer Global Opportunities Fund (OPGIX) [MF]		03/8/2021	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Invesco Oppenheimer Global Opportunities Fund (OPGIX) [EF]		08/31/2021	P	\$100,001 - \$250,000	
Fidelity - Traditional IRA ⇒ Invesco S&P SmallCap Health Care ETF (PSCH) [EF]		02/17/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ iShares Inc iShares MSCI Brazil ETF (EWZ) [OP]		05/7/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Call Options; Strike Price \$36; Expires 5/14/21					
Fidelity - Traditional IRA ⇒ iShares Inc iShares MSCI Brazil ETF (EWZ) [OP]		05/28/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Call Options; Strike Price \$38; Expires 6/4/21					
Fidelity - Traditional IRA ⇒ iShares Inc. iShares MSCI Brazil ETF (EWZ) [EF]		01/25/2021	P	\$1,001 - \$15,000	
Fidelity - Traditional IRA ⇒ iShares Inc. iShares MSCI Brazil ETF (EWZ) [EF]		04/1/2021	P	\$100,001 - \$250,000	
Fidelity - Traditional IRA ⇒ iShares Inc. iShares MSCI Brazil ETF (EWZ) [EF]		05/14/2021	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ iShares Inc. iShares MSCI Brazil ETF (EWZ) [EF]		05/19/2021	P	\$100,001 - \$250,000	
Fidelity - Traditional IRA ⇒ iShares Inc. iShares MSCI Brazil ETF (EWZ) [EF]		06/4/2021	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity - Traditional IRA ⇒ iShares Inc. iShares MSCI Brazil ETF (EWZ) [EF]		08/12/2021	P	\$100,001 - \$250,000	
Fidelity - Traditional IRA ⇒ iShares Russell 2000 Value ETF (IWN) [EF]		01/15/2021	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ iShares TR Micro-Cap ETF (IWC) [EF]		03/26/2021	P	\$50,001 - \$100,000	
Fidelity - Traditional IRA ⇒ iShares TR Micro-Cap ETF (IWC) [EF]		03/31/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ SPDR Bloomberg Barclays High Yield Bond (JNK) [EF]		03/17/2021	S	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ SPDR Real Estate Select Sector (XLRE) [EF]		03/17/2021	P	\$50,001 - \$100,000	
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [OP]		02/22/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Call Option; Strike Price \$45; Expires 3/5/21					
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		03/5/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [OP]		04/30/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Call Options; Strike Price \$65; Expires 5/14/21					
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [OP]		05/5/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Call Options; Strike Price \$65; Expires 5/14/21					
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [OP]		08/9/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Call Options; Strike Price \$67; Expires 8/27/21					
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		03/29/2021	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		03/30/2021	P	\$100,001 - \$250,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		08/27/2021	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		09/16/2021	P	\$100,001 - \$250,000	
Fidelity - Traditional IRA ⇒ Vanec ETF TR Fallen Angel High Yield Bond (ANGL) [EF]		11/12/2021	P	\$100,001 - \$250,000	
Fidelity - Traditional IRA ⇒ Vanec Vectors TR Vietnam ETF (VNM) [EF]		01/19/2021	P	\$50,001 - \$100,000	
Fidelity - Traditional IRA ⇒ Vanec Vectors TR Vietnam ETF (VNM) [EF]		02/17/2021	S	\$250,001 - \$500,000	<input type="checkbox"/>
Fidelity - Traditional IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]		06/10/2021	P	\$100,001 - \$250,000	
Fidelity Brokerage #1 ⇒ Fidelity Capital & Income Fund (FAGIX) [MF]		12/3/2021	P	\$1,001 - \$15,000	
Fidelity Brokerage #1 ⇒ Fidelity Contrafund Fund (FCNTX) [MF]		12/10/2021	P	\$1,001 - \$15,000	
Fidelity Brokerage #1 ⇒ Fidelity Growth Company (FDGRX) [MF]		12/28/2021	P	\$15,001 - \$50,000	
Fidelity Brokerage #1 ⇒ Fidelity Total Bond Fund (FTBFX) [MF]		03/4/2021	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒ iShares 20 year Treasury (TLT) [EF]		03/1/2021	S	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity Brokerage #1 ⇒ iShares Inc iShares MSCI Taiwan ETF (EWT) [OP]		03/18/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Call Option; Strike Price \$58; Expires 4/16/2021					
Fidelity Brokerage #1 ⇒ iShares Inc iShares MSCI Taiwan ETF (EWT) [OP]		03/19/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Call Option; Strike Price \$58; Expires 4/16/2021					
Fidelity Brokerage #1 ⇒		04/14/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares Inc iShares MSCI Taiwan ETF (EWT) [OP]					
DESCRIPTION: Call Option; Strike Price \$58; Expires 4/16/2021					
Fidelity Brokerage #1 ⇒ iShares Inc iShares MSCI Taiwan ETF (EWT) [OP]		04/15/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Call Option; Strike Price \$58; Expires 4/16/2021					
Fidelity Brokerage #1 ⇒ iShares Inc iShares MSCI Taiwan ETF (EWT) [OP]		06/15/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Call Option; Strike Price \$60; Expires 6/18/2021					
Fidelity Brokerage #1 ⇒ iShares Inc iShares MSCI Taiwan ETF (EWT) [OP]		06/16/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Call Option; Strike Price \$60; Expires 6/18/2021					
Fidelity Brokerage #1 ⇒ iShares Inc iShares MSCI Taiwan ETF (EWT) [EF]		06/14/2021	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒ iShares Inc. iShares MSCI Brazil ETF (EWZ) [EF]		03/3/2021	P	\$100,001 - \$250,000	
Fidelity Brokerage #1 ⇒ iShares Inc. iShares MSCI Brazil ETF (EWZ) [EF]		12/30/2021	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity Brokerage #1 ⇒ iShares MSCI Emerging Markets Asia ETF (EEMA) [EF]		12/30/2021	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Brokerage #1 ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		03/4/2021	P	\$100,001 - \$250,000	
Fidelity Brokerage #1 ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		03/8/2021	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #1 ⇒ Vanguard Whitehall FDS High Div Yield (VYM) [EF]		06/9/2021	P	\$100,001 - \$250,000	
Fidelity Brokerage #2 ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		07/15/2021	P	\$50,001 - \$100,000	
Fidelity Brokerage #2 ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		11/17/2021	P	\$50,001 - \$100,000	
Fidelity Brokerage #2 ⇒		03/22/2021	P	\$50,001 -	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]				\$100,000	
Fidelity Brokerage #2 ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		03/30/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #2 ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		05/27/2021	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #2 ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		10/20/2021	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Brokerage #2 ⇒ VanEck Vectors Mortgage REIT Income ETF (MORT) [EF]		12/31/2021	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Aberdeen Standard Bloomberg All Commodity Strategy K-1 Free ETF (BCI) [EF]	SP	06/15/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ First Trust Preferred Securities and Income ETF ETF (FPE) [EF]	SP	06/17/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ Goldman Sachs ActiveBeta Emerging Markets Equity ETF (GEM) [EF]	SP	11/23/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ Invesco Russell 1000 Dynamic (OMFL) [EF]	SP	05/10/2021	P	\$15,001 - \$50,000	
Spinnaker Trust - Brokerage ⇒ iShares 10+ Year Inv Grade Corp Bond ETF (IGLB) [EF]	SP	06/25/2021	P	\$15,001 - \$50,000	
Spinnaker Trust - Brokerage ⇒ iShares Barclays 10-20 Year Treasury Bond Fund (TLH) [EF]	SP	10/18/2021	P	\$15,001 - \$50,000	
Spinnaker Trust - Brokerage ⇒ iShares Core 1-5 Year Bond (ISTB) [EF]	SP	03/1/2021	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares Core 1-5 Year Bond (ISTB) [EF]	SP	06/23/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares Core 1-5 Year Bond (ISTB) [EF]	SP	08/26/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Spinnaker Trust - Brokerage ⇒ iShares Core Total Year USD Bond ETF (IUSB) [EF]	SP	03/3/2021	P	\$15,001 - \$50,000	
Spinnaker Trust - Brokerage ⇒ iShares Core Total Year USD Bond ETF (IUSB) [EF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ iShares Core Total Year USD Bond ETF (IUSB) [EF]	SP	10/18/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	06/28/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ iShares Global Clean Energy (ICLN) [EF]	SP	08/27/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ iShares Gold Trust (IAU) [EF]	SP	06/15/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ iShares Gold Trust (IAU) [EF]	SP	10/14/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares Inc iShares MSCI Taiwan ETF (EWT) [EF]	SP	11/23/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares J.P. Morgan EM Local Currency Bond (LEMB) [EF]	SP	05/18/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares J.P. Morgan EM Local Currency Bond (LEMB) [EF]	SP	08/24/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ iShares MSCI China A (CNYA) [EF]	SP	11/26/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	02/23/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ KraneShares Bosera MSCI China A ETF (KBA) [EF]	SP	03/4/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒	SP	04/14/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
KraneShares Bosera MSCI China A ETF (KBA) [EF]					
Spinnaker Trust - Brokerage ⇒ KraneShares CSI China Internet ETF (KWEB) [EF]	SP	03/4/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ KraneShares CSI China Internet ETF (KWEB) [EF]	SP	06/24/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ KraneShares CSI China Internet ETF (KWEB) [EF]	SP	08/25/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ KraneShares Global Carbon (KRBN) [EF]	SP	10/18/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ SPDR Blackstone GSO Senior Loan (SRLN) [EF]	SP	05/20/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]	SP	02/19/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	05/6/2021	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Spinnaker Trust - Brokerage ⇒ VanEck Vectors Gold Miners (GDX) [EF]	SP	11/26/2021	P	\$1,001 - \$15,000	
Spinnaker Trust - Brokerage ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	SP	08/25/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TD Ameritrade - Brokerage ⇒ iShares Latin America (ILF) [EF]		01/26/2021	P	\$50,001 - \$100,000	
TD Ameritrade - Brokerage ⇒ iShares Latin America (ILF) [EF]		12/31/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
TIAA ⇒ TIAA CREF Global Equities R3 [MF]		12/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ TIAA CREF Global Equities R3 [MF]		06/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ TIAA CREF Growth R3 [MF]		06/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA ⇒ TIAA CREF Large-Cap Value Fund [MF]		12/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ TIAA CREF Large-Cap Value Fund [MF]		06/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ TIAA Traditional [MF]		12/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ TIAA Traditional [MF]		06/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard - Brokerage ⇒ Vanguard Intermediate-Term Tax-Exempt Fund Admiral Shares (VWIUX) [MF]		03/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard - Brokerage ⇒ Vanguard Long-Term Tax-Exempt Fund Admiral Shares (VWLUX) [MF]		03/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard - Brokerage ⇒ Vanguard Total International Stock ETF (VXUS) [MF]		12/23/2021	P	\$1,001 - \$15,000	
Vanguard - Brokerage ⇒ Vanguard Total International Stock ETF (VXUS) [MF]		03/23/2021	P	\$1,001 - \$15,000	
Vanguard - Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [MF]		12/30/2021	P	\$1,001 - \$15,000	
Vanguard - Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		03/23/2021	P	\$1,001 - \$15,000	
Welch Account ⇒ Agilent Technologies, Inc. (A) [ST]		11/18/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Autodesk [CS]		11/18/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: 3.6% due 9/15/2022 Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Cerner Corporation (CERN) [ST]		11/18/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ Church & Dwight Company, Inc. (CHD) [ST]		11/18/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Cisco Systems, Inc. (CSCO) [ST]		11/18/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Cloetta AB [PS]		09/2/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Cloetta AB, CLOEF Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ General Electric Company (GE) [ST]		11/18/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ General Electric Company (GE) [ST]		11/26/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Spinnaker Trust - Brokerage					
Welch Account ⇒ International Business Machines Corporation (IBM) [ST]		11/26/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Spinnaker Trust - Brokerage					
Welch Account ⇒ Kubota Corporation (KUBTY) [ST]		11/18/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Kyocera Corp Ordinary Shares (KYOCF) [ST]		11/18/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Mitek Systems, Inc. (MITK) [ST]		11/18/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ PayPal Holdings, Inc. [CS]		11/18/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: 2.4% due 10/1/2024 Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Qualcomm [CS]		11/18/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: 3% due 5.20.22 Sub holding of Charles Schwab - Brokerage					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Welch Account ⇒ SwedenCare AB [OT]		11/19/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LOCATION: SE					
DESCRIPTION: Location: US Description: Traded on Stockholm Stock Exchange Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Tennant Company (TNC) [ST]		11/18/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ U.S. Bancorp (USB) [ST]		11/18/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Unilever NV (UN) [ST]		11/18/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Union Pacific Corporation (UNP) [ST]		11/26/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Spinnaker Trust - Brokerage					
Welch Account ⇒ Vaisala Oy Ordinary Shares -A- (VAIAF) [ST]		11/18/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					
Welch Account ⇒ Wells Fargo & Company (WFC) [ST]		11/3/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sub holding of Charles Schwab - Brokerage					

* 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
Public Service Board	Spouse Salary	N/A
Fidelity	Required Minimum Distribution	\$118,843.67
TIAA	Annuity Distribution	\$22,365.90

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Mascoma Savings Banks	2011	Mortgage (Property: Norwich, Vermont)	\$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

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Aspen Institute, Inc. (Congressional Program)	10/22/2021	10/24/2021	Washington, DC - Gettysburg, PA - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- American Century
LOCATION: US
- Charles Schwab - Brokerage
LOCATION: US
- Charles Schwab - Contributory IRA
- Charles Schwab - Inherited IRA
- Fidelity - Traditional IRA
- Fidelity Brokerage #1
LOCATION: US
- Fidelity Brokerage #2
LOCATION: US

- Spinnaker Trust - Brokerage (Owner: SP)
LOCATION: US
- TD Ameritrade - Brokerage
LOCATION: US
- TIAA
- Vanguard - Brokerage
LOCATION: US
- Welch Account
LOCATION: US

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

COMMENTS

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. Peter Welch , 08/13/2022