Executive Branch Personnel
Public Financial Disclosure Report (OGE Form 278e)

Filer's Information

LaBolt, Benjamin C

Assistant to the President and Director of Communications, White House - Biden-Harris Administration

Report Year: 2024

Other Federal Government Positions Held During the Preceding 12 Months:
None

Electronic Signature - I certify that the statements I have made in this form are true, complete and correct to the best of my knowledge.

/s/ LaBolt, Benjamin C [electronically signed on 04/18/2024 by LaBolt, Benjamin C in Integrity.gov]

Agency Ethics Official's Opinion - On the basis of information contained in this report, I conclude that the filer is in compliance with applicable laws and regulations (subject to any comments below).
/s/ Chung, Christie, Certifying Official [electronically signed on 05/30/2024 by Chung, Christie in Integrity.gov]

Other review conducted by
/s/ Chung, Christie, Ethics Official [electronically signed on 05/30/2024 by Chung, Christie in Integrity.gov]

U.S. Office of Government Ethics Certification

Data Revised 05/30/2024

Data Revised 05/23/2024

1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME	CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
1	Bully Pulpit Interactive (BPI)	Washington, District of Columbia	Corporation	Partner, Board Director	9/2016	2/2023
2	Haun Ventures Management LP	Menlo Park, California	Venture Capital Fund	Advisor	6/2022	2/2023
3	The Incite Agency Holdings	San Francisco, California	Corporation	Controlling Officer	9/2016	Present
4	Benjamin LaBolt Living Trust	San Francisco, California	Trust	Trustee	6/2018	Present

2. Filer's Employment Assets & Income and Retirement Accounts

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	BPI	N/A		Salary and Commission	$758,501
2	IRA	No			
2.1	ISHARES CORE MSCI EAFE ETF ETF (IEFA)	Yes	$15,001 - $50,000		None (or less than $201)
2.2	ISHARES CORE MSCI EMERGING MARKETS ETF (IEMG)	Yes	$15,001 - $50,000		None (or less than $201)
2.3	ISHARES CORE S&P SMALL-CAP ETF (IJR)	Yes	$15,001 - $50,000		None (or less than $201)
2.4	ISHARES TRUST-ISHARES CURRENCY HEDGED MSCI EAFE ETF (HEFA)	Yes	$15,001 - $50,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.5	SPDR BLOOMBERG HIGH YIELD BOND ETF (JNK)	Yes	$15,001 - $50,000		None (or less than $201)
2.6	VANGUARD GLOBAL EX-US REAL ESTATE ETF ETF (VNQI)	Yes	$15,001 - $50,000		None (or less than $201)
2.7	VANGUARD INDEX FUNDS - VANGUAR SMALL-CAP VALUE ETF (VBR)	Yes	$15,001 - $50,000		None (or less than $201)
2.8	VANGUARD INDEX FUNDS - VANGUAR VANGUARD VALUE ETF (VTV)	Yes	$15,001 - $50,000		None (or less than $201)
2.9	VANGUARD INTERMEDIATE TERM BOND INDEX FUND ETF (BIV)	Yes	$15,001 - $50,000		None (or less than $201)
2.10	Vanguard Real Estate Index Fund ETF (VNQ)	Yes	$15,001 - $50,000		None (or less than $201)
2.11	VANGUARD S&P 500 ETF (VOO)	Yes	$100,001 - $250,000		None (or less than $201)
2.12	VANGUARD SHORT-TERM BOND ETF (BSV)	Yes	$15,001 - $50,000		None (or less than $201)
2.13	U.S. brokerage account (cash)	N/A	$15,001 - $50,000		None (or less than $201)
3	BPI	N/A		Equity Payout	$3,018,399
4	Haun Ventures	N/A		Carried Interest Payout	$20,833

3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	BPI	Washington, District of Columbia	I have sold my stake in BPI and received an equity payout pursuant to the LLC agreement and my employment agreement. I forfeited any unvested stock units, and I no longer own any equity in BPI. In 2023, I received my last commission payment for work done prior to my departure, pursuant to my employment agreement.	9/2016
2	Incite Agency Holdings	San Francisco, California	Incite Agency Holdings will remain dormant during the duration of my government service and terminate following the completion of my final commission payments from BPI, payment of final taxes, and upon filing of my final tax return.	9/2016
3	Haun Ventures	Menlo Park, California	Pursuant to my separation agreement, I received a carried interest payment from Haun Ventures prior to starting Federal service. I forfeited any unvested stock units pursuant to my separation agreement. I no longer have any interest in the entity.	2/2023

4. Filer's Sources of Compensation Exceeding $5,000 in a Year

(N/A) - Not required for this type of report

5. Spouse's Employment Assets & Income and Retirement Accounts

None

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Bitcoin (Coinbase account)	N/A	$100,001 - $250,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2	Ethereum (Coinbase account)	N/A	$15,001 - $50,000		None (or less than $201)
3	U.S. bank #1 (cash)	N/A	$15,001 - $50,000		None (or less than $201)
4	Residential Real Estate (1), San Francisco, California	N/A	$500,001 - $1,000,000	Rent or Royalties	$15,001 - $50,000
5	Benjamin LaBolt Living Trust	No			
5.1	WESTN PLACER CALIF WASTE MGMT REV 5% 06/01/26 JD BDS MATERIALS RECOVERY FAC 2022A GREEN BOND BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.2	ISHARES SHORT TERM NATIONAL MUNI BOND ETF (MUB)	Yes	$15,001 - $50,000		$1,001 - $2,500
5.3	SPDR NUVEEN BLOOMBERG MUNICIPA MUTUAL FUND Short Term Common (SHM)	Yes	$50,001 - $100,000		None (or less than $201)
5.4	SCHWAB STRATEGIC TRUST - SCHWAB INTERNATIONAL EQUITY ETF	Yes	$15,001 - $50,000		$2,501 - $5,000
5.5	UBER TECHNOLOGIES, INC. CMN (UBER)	N/A	None (or less than $1,001)	Capital Gains	$201 - $1,000
5.6	ALPHABET INC. CMN CLASS A (GOOGL)	N/A	None (or less than $1,001)	Capital Gains	$1,001 - $2,500
5.7	ALPHABET INC. CMN CLASS C (GOOG)	N/A	None (or less than $1,001)	Capital Gains	$1,001 - $2,500
5.8	CONSTELLATION ENERGY CORP CMN (CEG)	N/A	None (or less than $1,001)	Capital Gains	$15,001 - $50,000
5.9	FORTUNE BRANDS INNOVATIONS INC CMN (FBIN)	N/A	None (or less than $1,001)	Capital Gains	$15,001 - $50,000
5.10	EXELON CORPORATION CMN (EXC)	N/A	None (or less than $1,001)	Capital Gains	$50,001 - $100,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.11	GENERAL ELECTRIC COMPANY CMN (GE)	N/A	None (or less than $1,001)	Capital Gains	$50,001 - $100,000
5.12	MASTERBRAND INC CMN (MBC)	N/A	None (or less than $1,001)	Capital Gains	$2,501 - $5,000
5.13	GE HEALTHCARE TECHNOLOGIES INC CMN (GEHC)	N/A	None (or less than $1,001)	Capital Gains	$15,001 - $50,000
5.14	YUM BRANDS, INC. CMN (YUM)	N/A	None (or less than $1,001)	Capital Gains	$15,001 - $50,000
5.15	PEPSICO, INC. CMN (PEP)	N/A	None (or less than $1,001)	Capital Gains	$100,001 - $1,000,000
5.16	YUM CHINA HOLDINGS, INC. CMN (YUMC)	N/A	None (or less than $1,001)	Capital Gains	$15,001 - $50,000
5.17	iShares Currency Hedged MSCI EAFE ETF (HEFA)	Yes	$100,001 - $250,000		$201 - $1,000
5.18	Vanguard Small-Cap Value Index Fund ETF Class Shares (VBR)	Yes	$50,001 - $100,000		$201 - $1,000
5.19	Vanguard Value Index Fund ETF Shares (VTV)	Yes	$15,001 - $50,000		$201 - $1,000
5.20	VanguardGlobal ex-US Real Estate Index Fund ETF Shares (VNQI)	Yes	$15,001 - $50,000		$201 - $1,000
5.21	Residential Real Estate (2), San Francisco, California	N/A	$1,000,001 - $5,000,000	Rent or Royalties	$15,001 - $50,000
5.22	REDLANDS CALIF UNI SCH DIST GO 5% 07/01/27 JJ GO REF BDS 2017 UT BEO	N/A	$50,001 - $100,000		None (or less than $201)
5.23	U.S. brokerage account (cash)	N/A	$250,001 - $500,000		$50,001 - $100,000
5.24	BAY AREA WTR SUPPLY & CONSV REV 5% 10/01/33-CA AO REFUNDING REVENUE BONDS	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.25	CALIFORNIA EDL FACS AUTH REV REV 5% 06/01/33 JD BDS STANFORD UNIV V3 BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.26	CALIFORNIA ST DEPT WTR RES REV 5% 12/01/32 JD CENT VY PROJ REV SYS BDS BF BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.27	CALIFORNIA ST GO 5% 04/01/27 AO VAR PURP GO REF BDS UT BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.28	CALIFORNIA ST GO 5% 09/01/30 MS OBLIGATION REFUNDING BONDS (FORWARD DELIVERY) UT BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.29	CALIFORNIA ST GO 5% 10/01/29 AO VAR PURP GO REF BDS UT BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.30	CALIFORNIA ST GO 5% 12/01/28 JD OBLIGATION BONDS VARIOUS PURPOSE GENERAL UT BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.31	GOLDEN ST TOB SECURITIZATION REV 5.0000% 06/01/31-CA JD CORP CALIF TOB SETTLEMENT REV AS BCK BDS	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.32	GOLDEN ST TOB SECURITIZATION REV 5.0000% 06/01/35-CA JD CORP CALIF TOB SETTLEMENT REV ASSET BACKED BDS 2018A-1 BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.33	GOLDEN ST TOB SECURITIZATION REV 5.0000% 06/01/40-CA JD -CA JD ASSET BACKED BDS MSF S-T SPL RDM S-T X-ORD	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.34	GOLDEN ST TOB SECURITIZATION REV 5.0000% 06/01/40-CA JD CA JD ENH ASSET BACKED BDS PR ERE S-T SPL RDM S-T XORD RDM	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.35	LA COMMUNITY COLLEGE DIST GO 5.0000% 08/01/30-CA FA ANGELES COUNTY, CALIFORNIA BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.36	LOS ANGELES CALIF CMNTY GO 5.0000% 08/01/31 FA COLLEGE DIST ANGELES COUNTY, CALIFORNIA) PRERE 08/01/24	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.37	LOS ANGELES CALIF DEPT ARPTS REV 5% 05/15/31 MN REV INTL SUB REF BDS 2023 B BEO SUB LIEN	N/A	$50,001 - $100,000	Interest	$1,001 - $2,500
5.38	LOS ANGELES CALIF DEPT WTR & REV 5% 07/01/28 JJ PWR REV SYS BDS 2023 A BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.39	LOS ANGELES CALIF DEPT WTR & REV 5% 07/01/29 JJ PWR REV SYS BDS 2020 A BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.40	LOS ANGELES CALIF UNI SCH DIST GO 5% 07/01/32-CA JJ GO BDS 2018 B-1 UT BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.41	LOS ANGELES CALIF WASTEWATER REV 5% 06/01/31 JD REVENUE BONDS REFUNDING SERIES 2022-C BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.42	MINNESOTA ST GO 5% 08/01/26 FA GO VAR PURP REF BDS 2022D UT BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.43	MOUNT SAN ANTONIO CALIF CMNTY GO 5% 09/01/24 MS COLLEGE DIST GO BDS A PRERE	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.44	NEBO UTAH SCH DIST LOC BLDG REV 5% 07/01/29 JJ AUTH LEASE REV BDS 2023 BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.45	PENNSYLVANIA ST GO 5% 10/01/32 AO GO BDS FIRST 2022 UT BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.46	POWAY CALIF UNI SCH DIST GO 5.0000% 08/01/24 FA RFDG-SCH FACS IMPT DIST NO 2002-1 BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.47	REDLANDS CALIF UNI SCH DIST GO 5% 07/01/27 JJ GO REF BDS 2017 UT BEO	N/A	$50,001 - $100,000	Interest	$1,001 - $2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.48	RIVERSIDE CALIF CMNTY COLLEGE GO 5% 08/01/25 FA DIST GO REF BDS 2014 A PRERE 08/01/24 LT BEO SR LIEN	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.49	SAN BERNARDINO CALIF CMNTY GO 4.0000% 08/01/49 FA COLLEGE DIST ELECTION 2018 GO BDS 2019 A PRERE 08/01/27 LT	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.50	SAN DIEGO CALIF UNI SCH DIST REV 4% 06/30/23 JD TAX AND REV ANTIC NTS 2022-2023 A BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.51	SAN FRANCISCO CALIF BAY AREA REV 5% 07/01/25 JJ RAPID TRAN DIST SALES TAX REV REF BDS 2017 A GREEN BOND BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.52	SAN FRANCISCO CALIF CITY & REV 5% 11/01/30-CA MN CNTY PUB UTILS COMMN WTR REV WTR REV BDS 2015A BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.53	SANTA CLARA CALIF UNI SCH DIST GO 5% 07/01/23 JJ ELECTION 2018 GO BDS 2023 LT BEO	N/A	$50,001 - $100,000	Interest	$1,001 - $2,500
5.54	SANTA CLARA VY CALIF TRANSN AU REV 5% 04/01/31 AO MEASURE A SALES TAX REVENUE REFUNDING BONDS, 2023 BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.55	DEPARTMENT OF AIRPORTS REV 5% 05/15/29 MN OF THE CITY OF LOS ANGELES,CA LOS ANGELES INTERNATNL AIRPORT	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.56	STATE OF CALIFORNIA GO 5% 11/01/30 MN VARIOUS PURPOSE GENERAL OBLIGATION REFUNDING BONDS BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.57	STATE OF CALIFORNIA GO 5.0000% 09/01/23 MS GENERAL OBLIGATION BONDS PURP BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.58	STATE OF CALIFORNIA REV 5% 09/01/31 MS OBLIGATION REFUNDING BONDS (FORWARD DELIVERY) BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.59	UNIVERSITY CALIF REVS REV 4% 05/15/33- CA MN GEN REV BDS 2017 AY BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.60	UNIVERSITY CALIF REVS REV 5% 05/15/33 MN GENERAL REVENUE BONDS 2023 SERIES BN (TAX-EXEMPT) BEO	N/A	$15,001 - $50,000	Interest	$1,001 - $2,500
5.61	ISHARES CORE MSCI EAFE ETF ETF (IEFA)	Yes	$250,001 - $500,000		$5,001 - $15,000
5.62	ISHARES CORE MSCI EMERGING MARKETS ETF (IEMG)	Yes	$15,001 - $50,000		$1,001 - $2,500
5.63	ISHARES CORE S&P SMALL-CAP ETF (IJR)	Yes	$100,001 - $250,000		$1,001 - $2,500
5.64	ISHARES MSCI ACWI ETF (ACWI)	Yes	$100,001 - $250,000		$1,001 - $2,500
5.65	SHARES NATIONAL MUNI BOND ETF (MUB)	Yes	$50,001 - $100,000		$1,001 - $2,500
5.66	ISHARES RUSSELL 1000 GROWTH ETF (IWF)	Yes	$250,001 - $500,000		$1,001 - $2,500
5.67	ISHARES RUSSELL 1000 VALUE ETF (IWD)	Yes	$250,001 - $500,000		$2,501 - $5,000
5.68	ISHARES TRUST-ISHARES CURRENCY HEDGED MSCI EAFE ETF (HEFA)	Yes	$100,001 - $250,000		$1,001 - $2,500
5.69	Schwab International Equity ETF (SCHF)	Yes	$15,001 - $50,000		$1,001 - $2,500
5.70	SPDR NUVEEN BLOOMBERG HIGH YIE ETF (HYMB)	Yes	$15,001 - $50,000		$5,001 - $15,000
5.71	SPDR Nuveen Bloomberg Short Term Municipal Bond ETF (SHM)	Yes	$100,001 - $250,000		$1,001 - $2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.72	VANGUARD FTSE EMERGING MKTS ETF (VWO)	Yes	$15,001 - $50,000		$1,001 - $2,500
5.73	VANGUARD GLOBAL EX-US REAL ESTATE ETF ETF (VNQI)	Yes	$15,001 - $50,000		$1,001 - $2,500
5.74	VANGUARD INDEX FUNDS - VANGUAR SMALL-CAP VALUE ETF (VBR)	Yes	$50,001 - $100,000		$1,001 - $2,500
5.75	VANGUARD INDEX FUNDS - VANGUAR VANGUARD VALUE ETF (VTV)	Yes	$15,001 - $50,000		$1,001 - $2,500
5.76	VANGUARD INDEX FUNDS VANGUARD EXTENDED MARKET ETF MUTUAL FUND (VXF)	Yes	$15,001 - $50,000		$1,001 - $2,500
5.77	VANGUARD INDEX FUNDS VANGUARD LARGE-CAP ETF (VV)	Yes	$1,001 - $15,000		$1,001 - $2,500
5.78	Vanguard Real Estate Index Fund ETF (VNQ)	Yes	$15,001 - $50,000		$1,001 - $2,500
5.79	VANGUARD S&P 500 ETF (VOO)	Yes	$1,000,001 - $5,000,000		$15,001 - $50,000
5.80	VANGUARD SPECIALIZED PORTFOLIO VANGUARD DIVIDEND APPRECIATION MUTUAL FUND CL ETF SER VIPERS (VIG)	Yes	$15,001 - $50,000		$201 - $1,000
5.81	Meta Platforms, Inc.	N/A	None (or less than $1,001)	Capital Gains	$201 - $1,000
5.82	SANTA CLARA CALIF UNI SCH DIST GO 5% 07/01/25 JJ	N/A	$50,001 - $100,000	Interest	$201 - $1,000
5.83	CALIFORNIA ST GO 5% 04/01/33 AO	N/A	$15,001 - $50,000		None (or less than $201)
5.84	LOS ANGELES CALIF SOLID WASTE REV 5% 02/01/32 FA	N/A	$15,001 - $50,000		None (or less than $201)
5.85	STATE OF CALIFORNIA GO 5% 09/01/33 MS	N/A	$15,001 - $50,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.86	CLOVIS CALIF UNI SCH DIST GO 5.0000% 08/01/37 FA	N/A	$15,001 - $50,000		None (or less than $201)
6	Solana (Coinbase account)	N/A	$1,001 - $15,000		None (or less than $201)

7. Transactions

#	DESCRIPTION		TYPE	DATE	AMOUNT
1	PEPSICO, INC. CMN	See Endnote	Sale	07/12/2023	$100,001 - $250,000
2	ALPHABET INC. CMN CLASS A	See Endnote	Sale	07/12/2023	$1,001 - $15,000
3	ALPHABET INC. CMN CLASS C	See Endnote	Sale	07/12/2023	$1,001 - $15,000
4	GE HEALTHCARE TECHNOLOGIES INC CMN	See Endnote	Sale	07/12/2023	$15,001 - $50,000
5	CONSTELLATION ENERGY CORP CMN	See Endnote	Sale	07/12/2023	$15,001 - $50,000
6	FORTUNE BRANDS INNOVATIONS INC CMN	See Endnote	Sale	07/12/2023	$15,001 - $50,000
7	YUM CHINA HOLDINGS, INC. CMN	See Endnote	Sale	07/12/2023	$15,001 - $50,000
8	YUM BRANDS, INC. CMN	See Endnote	Sale	07/12/2023	$50,001 - $100,000
9	UBER TECHNOLOGIES, INC. CMN	See Endnote	Sale	07/12/2023	$1,001 - $15,000
10	EXELON CORPORATION CMN	See Endnote	Sale	07/12/2023	$50,001 - $100,000
11	GENERAL ELECTRIC COMPANY CMN	See Endnote	Sale	07/12/2023	$100,001 - $250,000

#	DESCRIPTION		TYPE	DATE	AMOUNT
12	MASTERBRAND INC CMN	See Endnote	Sale	07/12/2023	$1,001 - $15,000
13	META PLATFORMS INC-CLASS A CMN CLASS A	See Endnote	Sale	07/12/2023	$1,001 - $15,000
14	Vanguard Real Estate Index Fund ETF (VNQ) - multiple		Purchase		$15,001 - $50,000
15	Vanguard Small Cap Value ETF (VBR) - multiple		Purchase		$50,001 - $100,000
16	iShares Core S&P Small-Cap ETF (IJR) - multiple		Purchase		$100,001 - $250,000
17	iShares Russell 1000 Value ETF (IWD) - multiple		Purchase		$100,001 - $250,000
18	Vanguard Value ETF (VTV) - multiple		Purchase		$15,001 - $50,000
19	iShares Russell 1000 Growth ETF (IWF)		Purchase	07/17/2023	$100,001 - $250,000
20	Vanguard S&P 500 ETF (VOO) - multiple		Purchase		$500,001 - $1,000,000
21	iShares MSCI ACWI ETF (ACWI)		Purchase	12/05/2023	$100,001 - $250,000
22	Vanguard Global ex-U.S. Real Estate ETF (VNQI) - multiple		Purchase		$15,001 - $50,000
23	iShares Core MSCI Emerging Markets ETF (IEMG) - multiple		Purchase		$50,001 - $100,000
24	iShares Currency Hedged MSCI EAFE ETF (HEFA) - multiple		Purchase		$100,001 - $250,000
25	iShares Core MSCI EAFE ETF (IEFA) - multiple		Purchase		$250,001 - $500,000
26	SPDR Nuveen Bloomberg Short Term Municipal Bond ETF (SHM) - multiple		Purchase		$50,001 - $100,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
27	iShares National Muni Bond ETF (MUB)	Purchase	08/16/2023	$15,001 - $50,000
28	NEBO UTAH SCH DIST LOC BLDG REV 5% 07/01/29 JJ, bonds	Purchase	03/10/2023	$15,001 - $50,000
29	STATE OF CALIFORNIA GO 5% 11/01/30 MN, bonds	Purchase	03/10/2023	$15,001 - $50,000
30	LOS ANGELES CALIF CMNTY GO 5.0000% 08/01/31 FA, bonds	Purchase	03/10/2023	$15,001 - $50,000
31	LA COMMUNITY COLLEGE DIST GO 5.0000% 08/01/30-CA FA, bonds	Purchase	03/10/2023	$50,001 - $100,000
32	SANTA CLARA CALIF UNI SCH DIST GO 5% 07/01/25 JJ, bonds	Purchase	03/10/2023	$50,001 - $100,000
33	LOS ANGELES CALIF UNI SCH DIST GO 5% 07/01/32-CA JJ, bonds	Purchase	03/10/2023	$15,001 - $50,000
34	SANTA CLARA CALIF UNI SCH DIST GO 5% 07/01/23 JJ, bonds	Purchase	03/10/2023	$50,001 - $100,000
35	STATE OF CALIFORNIA GO 5.0000% 09/01/23 MS, bonds	Purchase	03/10/2023	$15,001 - $50,000
36	SAN FRANCISCO CALIF CITY & REV 5% 11/01/30-CA MN, bonds	Purchase	03/13/2023	$15,001 - $50,000
37	REDLANDS CALIF UNI SCH DIST GO 5% 07/01/27 JJ, bonds	Purchase	03/13/2023	$50,001 - $100,000
38	CALIFORNIA ST GO 5% 10/01/29 AO, bonds	Purchase	03/15/2023	$15,001 - $50,000
39	CALIFORNIA ST GO 5% 04/01/33 AO, bonds	Purchase	03/16/2023	$15,001 - $50,000
40	LOS ANGELES CALIF DEPT WTR & REV 5% 07/01/28 JJ, bonds	Purchase	03/17/2023	$15,001 - $50,000
41	GOLDEN ST TOB SECURITIZATION REV 5.0000% 06/01/31-CA JD, bonds	Purchase	03/17/2023	$15,001 - $50,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
42	LOS ANGELES CALIF DEPT ARPTS REV 5% 05/15/31 MN, bonds	Purchase	03/29/2023	$50,001 - $100,000
43	BAY AREA WTR SUPPLY & CONSV REV 5% 10/01/33-CA AO, bonds	Purchase	04/19/2023	$15,001 - $50,000
44	LOS ANGELES CALIF SOLID WASTE REV 5% 02/01/32 FA, bonds	Purchase	07/13/2023	$15,001 - $50,000
45	SANTA CLARA VY TRANSN AUTH REV 5% 04/01/31 AO, bonds	Purchase	07/19/2023	$15,001 - $50,000
46	CALIFORNIA EDL FACS AUTH REV REV 5% 06/01/33 JD, bonds	Purchase	07/24/2023	$15,001 - $50,000
47	STATE OF CALIFORNIA GO 5% 09/01/33 MS, bonds	Purchase	09/08/2023	$15,001 - $50,000
48	CLOVIS CALIF UNI SCH DIST GO 5.0000% 08/01/37 FA, bonds	Purchase	09/14/2023	$15,001 - $50,000
49	Vanguard Short Term Bond ETF (BSV)	Purchase	03/30/2023	$15,001 - $50,000
50	iShares 7-10 Year Treasury Bond ETF (IEF) - multiple	Purchase		$1,001 - $15,000
51	Vanguard Intermediate Term Bond ETF (BIV) - multiple	Purchase		$15,001 - $50,000
52	SPDR Nuveen Bloomberg High Yield Municipal Bond ETF (HYMB)	Purchase	07/17/2023	$15,001 - $50,000
53	SPDR Bloomberg High Yield Bond ETF (JNK)	Purchase	03/30/2023	$15,001 - $50,000
54	iShares 7-10 Year Treasury Bond ETF (IEF) - multiple	Sale		$1,001 - $15,000
55	iShares Core MSCI Emerging Markets ETF (IEMG)	Sale	12/05/2023	$50,001 - $100,000
56	SPDR Nuveen Bloomberg Short Term Municipal Bond ETF (SHM)	Sale	10/30/2023	$1,001 - $15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
57	Vanguard Real Estate ETF (VNQ)	Sale	12/05/2023	$15,001 - $50,000
58	Vanguard Global ex-U.S. Real Estate ETF (VNQI)	Sale	12/05/2023	$15,001 - $50,000

8. Liabilities

#	CREDITOR NAME		TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
1	Goldman Sachs	See Endnote	Mortgage (investment/rental property)	$500,001 - $1,000,000	2022	2.75	30 year mortgage, 7 year ARM
2	VW Credit		Car Lease	$15,001 - $50,000	2023		3 year lease

9. Gifts and Travel Reimbursements

None

Endnotes

PART	#	ENDNOTE
7.	1	Sold 7/12/23
7.	2	Sold 7/12/23
7.	3	Sold 7/12/23
7.	4	Sold 7/12/23

PART	#	ENDNOTE
7.	5	Sold 7/12/23
7.	6	Sold 7/12/23
7.	7	Sold 7/12/23
7.	8	Sold 7/12/23
7.	9	Sold 7/12/23
7.	10	Sold 7/12/23
7.	11	Sold 7/12/23
7.	12	Sold 7/12/23
7.	13	Sold 7/12/23
8.	1	Mortgage for residential real estate properties in San Francisco

Summary of Contents

1. Filer's Positions Held Outside United States Government

Part 1 discloses positions that the filer held at any time during the reporting period (excluding positions with the United States Government). Positions are reportable even if the filer did not receive compensation.

This section does not include the following: (1) positions with religious, social, fraternal, or political organizations; (2) positions solely of an honorary nature; (3) positions held as part of the filer's official duties with the United States Government; (4) mere membership in an organization; and (5) passive investment interests as a limited partner or non-managing member of a limited liability company.

2. Filer's Employment Assets & Income and Retirement Accounts

Part 2 discloses the following:

- Sources of earned and other non-investment income of the filer totaling more than $200 during the reporting period (e.g., salary, fees, partnership share, honoraria, scholarships, and prizes)
- Assets related to the filer's business, employment, or other income-generating activities (1) that ended the reporting period with a value greater than $1,000 or (2) from which more than $200 in income was received during the reporting period (e.g., equity in business or partnership, stock options, retirement plans/accounts and their underlying holdings as appropriate, deferred compensation, and intellectual property, such as book deals and patents)

This section does not include assets or income from United States Government employment or assets that were acquired separately from the filer's business, employment, or other income-generating activities (e.g., assets purchased through a brokerage account). Note: The type of income is not required if the amount of income is $0 - $200 or if the asset qualifies as an excepted investment fund (EIF).

3. Filer's Employment Agreements and Arrangements

Part 3 discloses agreements or arrangements that the filer had during the reporting period with an employer or former employer (except the United States Government), such as the following:

- Future employment
- Leave of absence
- Continuing payments from an employer, including severance and payments not yet received for previous work (excluding ordinary salary from a current employer)
- Continuing participation in an employee welfare, retirement, or other benefit plan, such as pensions or a deferred compensation plan
- Retention or disposition of employer-awarded equity, sharing in profits or carried interests (e.g., vested and unvested stock options, restricted stock, future share of a company's profits, etc.)

4. Filer's Sources of Compensation Exceeding $5,000 in a Year

Part 4 discloses sources (except the United States Government) that paid more than $5,000 in a calendar year for the filer's services during any year of the reporting period.

The filer discloses payments both from employers and from any clients to whom the filer personally provided services. The filer discloses a source even if the source made its payment to the filer's employer and not to the filer. The filer does not disclose a client's payment to the filer's employer if the filer did not provide the services for which the client is paying.

5. Spouse's Employment Assets & Income and Retirement Accounts

Part 5 discloses the following:

- Sources of earned income (excluding honoraria) for the filer's spouse totaling more than $1,000 during the reporting period (e.g., salary, consulting fees, and partnership share)
- Sources of honoraria for the filer's spouse greater than $200 during the reporting period
- Assets related to the filer's spouse's employment, business activities, other income-generating activities (1) that ended the reporting period with a value greater than $1,000 or (2) from which more than $200 in income was received during the reporting period (e.g., equity in business or partnership, stock options, retirement plans/accounts and their underlying holdings as appropriate, deferred compensation, and intellectual property, such as book deals and patents)

This section does not include assets or income from United States Government employment or assets that were acquired separately from the filer's spouse's business, employment, or other income-generating activities (e.g., assets purchased through a brokerage account). Note: The type of income is not required if the amount of income is $0 - $200 or if the asset qualifies as an excepted investment fund (EIF). Amounts of income are not required for a spouse's earned income (excluding honoraria).

6. Other Assets and Income

Part 6 discloses each asset, not already reported, (1) that ended the reporting period with a value greater than $1,000 or (2) from which more than $200 in investment income was received during the reporting period. For purposes of the value and income thresholds, the filer aggregates the filer's interests with those of the filer's spouse and dependent children.

This section does not include the following types of assets: (1) a personal residence (unless it was rented out during the reporting period); (2) income or retirement benefits associated with United States Government employment (e.g., Thrift Savings Plan); and (3) cash accounts (e.g., checking, savings, money market accounts) at a single financial institution with a value of $5,000 or less (unless more than $200 in income was received). Additional exceptions apply. Note: The type of income is not required if the amount of income is $0 - $200 or if the asset qualifies as an excepted investment fund (EIF).

7. Transactions

Part 7 discloses purchases, sales, or exchanges of real property or securities in excess of $1,000 made on behalf of the filer, the filer's spouse or dependent child during the reporting period.

This section does not include transactions that concern the following: (1) a personal residence, unless rented out; (2) cash accounts (e.g., checking, savings, CDs, money market accounts) and money market mutual funds; (3) Treasury bills, bonds, and notes; and (4) holdings within a federal Thrift Savings Plan account. Additional exceptions apply.

8. Liabilities

Part 8 discloses liabilities over $10,000 that the filer, the filer's spouse or dependent child owed at any time during the reporting period.

This section does not include the following types of liabilities: (1) mortgages on a personal residence, unless rented out (limitations apply for PAS filers); (2) loans secured by a personal motor vehicle, household furniture, or appliances, unless the loan exceeds the item's purchase price; and (3) revolving charge accounts, such as credit card balances, if the outstanding liability did not exceed $10,000 at the end of the reporting period. Additional exceptions apply.

9. Gifts and Travel Reimbursements

This section discloses:

- Gifts totaling more than $480 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.
- Travel reimbursements totaling more than $480 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.

For purposes of this section, the filer need not aggregate any gift or travel reimbursement with a value of $192 or less. Regardless of the value, this section does not include the following items: (1) anything received from relatives; (2) anything received from the United States Government or from the District of Columbia, state, or local governments; (3) bequests and other forms of inheritance; (4) gifts and travel reimbursements given to the filer's agency in connection with the filer's official travel; (5) gifts of hospitality (food, lodging, entertainment) at the donor's residence or personal premises; and (6) anything received by the filer's spouse or dependent children totally independent of their relationship to the filer. Additional exceptions apply.

Privacy Act Statement

Title I of the Ethics in Government Act of 1978, as amended (the Act), 5 U.S.C. § 13101 et seq., as amended by the Representative Louise McIntosh Slaughter Stop Trading on Congressional Knowledge Act of 2012 (Pub. L. 112-105) (STOCK Act), and 5 C.F.R. Part 2634 of the U. S. Office of Government Ethics regulations require the reporting of this information. Failure to provide the requested information may result in separation, disciplinary action, or civil action. The primary use of the information on this report is for review by Government officials to determine compliance with applicable Federal laws and regulations. This report may also be disclosed upon request to any requesting person in accordance with sections 105 and 402(b)(1) of the Act or as otherwise authorized by law. You may inspect applications for public access of your own form upon request. Additional disclosures of the information on this report may be made: (1) to any requesting person, subject to the limitation contained in section 208(d)(1) of title 18, any determination granting an exemption pursuant to sections 208(b)(1) and 208(b)(3) of title 18; (2) to a Federal, State, or local law enforcement agency if the disclosing agency becomes aware of violations or potential violations of law or regulation; (3) to a source when necessary to obtain information relevant to a conflict of interest investigation or determination; (4) to the National Archives and Records Administration or the General Services Administration in records management inspections; (5) to the Office of Management and Budget during legislative coordination on private relief legislation; (6) when the disclosing agency determines that the records are arguably relevant to a proceeding before a court, grand jury, or administrative or adjudicative body, or in a proceeding before an administrative or adjudicative body when the adjudicator determines the records to be relevant to the proceeding; (7) to reviewing officials in a new office, department or agency when an employee transfers or is detailed from one covered position to another, a public financial disclosure report and any accompanying documents, including statements notifying an employee's supervising ethics office of the commencement of negotiations for future employment or compensation or of an agreement for future employment or compensation; (8) to a Member of Congress or a congressional office in response to an inquiry made on behalf of and at the request of an individual who is the subject of the record; (9) to contractors and other non-Government employees working on a contract, service or assignment for the Federal Government when necessary to accomplish a function related to this system of records; (10) on the OGE Website and to any person, department or agency, any written ethics agreement, including certifications of ethics agreement compliance, filed with OGE by an individual nominated by the President to a position requiring Senate confirmation; (11) on the OGE Website and to any person, department or agency, any certificate of divestiture issued by OGE; (12) on the OGE Website and to any person, department or agency, any waiver of the restrictions contained in Executive Order 13989 or any superseding executive order; (13) to appropriate agencies, entities and persons when there has been a suspected or confirmed breach of the system of records, the agency maintaining the records has determined that there is a risk of harm to individuals, the agency, the Federal Government, or national security, and the disclosure is reasonably necessary to assist in connection with the agency's efforts to respond to the suspected or confirmed breach or to prevent, minimize, or remedy such harm; and (14) to another Federal agency or Federal entity, when the agency maintaining the record determines that information from this system of records is reasonably necessary to assist the recipient agency or entity in responding to a suspected or confirmed breach or in preventing, minimizing, or remedying the risk of harm to individuals, the recipient agency or entity, the Federal Government, or national security. See also the OGE/GOVT-1 executive branch-wide Privacy Act system of records.

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