

Executive Branch Personnel

Public Financial Disclosure Report (OGE Form 278e)

Filer's Information

Kennedy, Victoria R

Ambassador to the Republic of Austria, Department of State

Report Year: 2023

Other Federal Government Positions Held During the Preceding 12 Months:

Member of the Board of Trustees - John F. Kennedy Center for the Performing Arts (12/2009 - 11/2021)

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/ Kennedy, Victoria R [electronically signed on 05/09/2023 by Kennedy, Victoria R 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/ Green, Marcella, Certifying Official [electronically signed on 07/06/2023 by Green, Marcella in Integrity.gov]

Other review conducted by

/s/ Green, Marcella, Ethics Official [electronically signed on 07/06/2023 by Green, Marcella in Integrity.gov]

U.S. Office of Government Ethics Certification

Data Revised 07/06/2023

1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME		CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
1	Reggie Crescent Trust (Family Trust #4)		New Orleans, Louisiana	Irrevocable Family Trust	Co-Trustee	6/2006	Present
2	Reggie DBR Trust (Family Trust #3)		New Orleans, Louisiana	Irrevocable Family Trust	Co-Trustee	6/2006	Present
3	Boheme Nominee Trust		Nantucket, Massachusetts	Real Estate Nominee Trust	Co-Trustee	10/2012	Present
4	18 Gardner Road Trust	See Endnote	Nantucket, Massachusetts	Irrevocable Family Trust	Co-Trustee	6/2007	Present
5	Victoria R. Kennedy 1999 Trust (Family Trust #1)		Boston, Massachusetts	Revocable Family Trust	Co-Trustee	11/1999	Present
6	Beacon Street Nominee Trust	See Endnote	Boston, Massachusetts	Real Estate Nominee Trust	Co-Trustee	3/2022	Present

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

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Acadia Strategies LLC	See Endnote	N/A	\$15,001 - \$50,000	Business Income	\$19,974
1.1	Fund II Foundation	See Endnote	N/A		Board Compensation	\$25,000
2	IRA #1		No			
2.1	Fidelity Government Cash Reserves		Yes	\$1,001 - \$15,000		\$201 - \$1,000
2.2	Fidelity 500 Index Fund		Yes	\$15,001 - \$50,000		\$201 - \$1,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.3	WCM Focused Intl Growth Fund Instl	Yes	\$15,001 - \$50,000		None (or less than \$201)
2.4	MFS International Intrinsic Value CI I	Yes	\$15,001 - \$50,000		\$5,001 - \$15,000
2.5	Principal Mid Cap Instl	Yes	\$50,001 - \$100,000		\$1,001 - \$2,500
2.6	T Rowe Price QM Sm Cap Growth Instl	Yes	\$15,001 - \$50,000		\$201 - \$1,000
2.7	Vanguard Dividend Growth Investor CI	Yes	\$50,001 - \$100,000		\$2,501 - \$5,000
2.8	Fidelity Advisor Total Bond CI Z	Yes	None (or less than \$1,001)		\$201 - \$1,000
2.9	Invesco QQQ Tr Unit Ser 1	Yes	\$15,001 - \$50,000		None (or less than \$201)
2.10	Vanguard Index Funds S&P 500 ETF USD	Yes	\$15,001 - \$50,000		\$201 - \$1,000
2.11	Vanguard Mid-Cap Index Fund	Yes	\$15,001 - \$50,000		\$201 - \$1,000
2.12	Vanguard Small-Cap Index Fund	Yes	\$15,001 - \$50,000		\$201 - \$1,000
2.13	Vanguard BD Index Fds Short Trm Bond	Yes	\$50,001 - \$100,000		\$201 - \$1,000
2.14	Fidelity Advisor Small Cap Growth Fund Class Z Shares (FIDGX)	Yes	\$1,001 - \$15,000		None (or less than \$201)
2.15	Vanguard Equity Income Fund Admiral Shares (VEIRX)	Yes	\$50,001 - \$100,000		\$2,501 - \$5,000
2.16	Fidelity Advisor Limited Term Bond Fund Class Z Shares (FIKRX)	Yes	\$50,001 - \$100,000		\$201 - \$1,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.17	Fidelity Conservative Income Bond Fund Institutional Class Shares (FCNVX)	Yes	\$15,001 - \$50,000		\$201 - \$1,000
2.18	iShares Core S&P 500 ETF (IVV)	Yes	\$1,001 - \$15,000		None (or less than \$201)
2.19	Vanguard Real Estate Index Fund ETF Shares (VNQ)	Yes	\$1,001 - \$15,000		None (or less than \$201)
2.20	PIMCO Inflation Response Multi-Asset Fund Institutional Class Shares (PIRMX)	Yes	None (or less than \$1,001)		\$5,001 - \$15,000

3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	Acadia Strategies LLC See Endnote	Boston, Massachusetts	Filer has a strictly passive ownership interest in this LLC, performing no management duties and providing no client services.	9/2015

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	Brokerage #1	No			
1.1	Fidelity Government Cash Reserves	Yes	\$1,001 - \$15,000		\$2,501 - \$5,000
1.2	Fidelity Money Market Fund Premium Class (FZDXX)	Yes	\$500,001 - \$1,000,000		\$5,001 - \$15,000
2	Family Trust #1	No			
2.1	Brokerage #2	No			
2.1.1	Fidelity Government Cash Reserves	Yes	\$100,001 - \$250,000		\$201 - \$1,000
2.1.2	Fidelity 500 Index Fund	Yes	\$250,001 - \$500,000		\$5,001 - \$15,000
2.1.3	Fidelity Overseas	Yes	\$100,001 - \$250,000		None (or less than \$201)
2.1.4	Champlain Mid Cap Class I	Yes	\$100,001 - \$250,000		\$1,001 - \$2,500
2.1.5	WCM Focused Intl Growth Fund Instl	Yes	\$1,001 - \$15,000		None (or less than \$201)
2.1.6	MFS International Intrinsic Value CI I	Yes	\$250,001 - \$500,000		\$15,001 - \$50,000
2.1.7	Principal Mid Cap Instl	Yes	\$250,001 - \$500,000		\$5,001 - \$15,000
2.1.8	T Rowe Price Divid Growth CI I	Yes	\$250,001 - \$500,000		\$15,001 - \$50,000
2.1.9	T Rowe Price QM Sm Cap Growth Instl	Yes	\$100,001 - \$250,000		\$5,001 - \$15,000
2.1.10	Vanguard Index Funds S&P 500 ETF USD	Yes	\$250,001 - \$500,000		\$2,501 - \$5,000
2.1.11	Vanguard Small-Cap Index Fund	Yes	\$100,001 - \$250,000		\$2,501 - \$5,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.1.12	Vanguard Equity Income Fund Admiral Shares (VEIRX)	Yes	\$100,001 - \$250,000		\$5,001 - \$15,000
2.1.13	Fidelity Money Market Fund Premium Class (FZDXX)	Yes	\$100,001 - \$250,000		\$2,501 - \$5,000
2.1.14	Vanguard Mid-Cap Index Fund ETF Shares (VO)	Yes	\$50,001 - \$100,000		None (or less than \$201)
2.1.15	iShares Core S&P Mid-Cap ETF (IJH)	Yes	None (or less than \$1,001)		\$1,001 - \$2,500
2.2	Brokerage #3	No			
2.2.1	Fidelity Government Cash Reserves	Yes	None (or less than \$1,001)		None (or less than \$201)
2.2.2	Automatic Data Processing Inc Com	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
2.2.3	CDW Corp Com	N/A	\$15,001 - \$50,000	Dividends	None (or less than \$201)
2.2.4	Canadian Natl Ry Co Com	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
2.2.5	DR Horton Inc Com Stk	N/A	None (or less than \$1,001)	Capital Gains Dividends	\$201 - \$1,000
2.2.6	Dollar Gen Corp New Com	N/A	\$1,001 - \$15,000	Dividends	None (or less than \$201)
2.2.7	Lowes Companies Inc Com	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
2.2.8	Nike Inc Class B Comm NPV	N/A	\$1,001 - \$15,000	Dividends	None (or less than \$201)
2.2.9	S&P Global Inc Com	N/A	\$15,001 - \$50,000	Dividends	None (or less than \$201)
2.2.10	Texas Instruments Inc Com	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
2.2.11	UnitedHealth Group Inc	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.2.12	Cintas Corp. (CTAS)	N/A	\$1,001 - \$15,000	Dividends	None (or less than \$201)
2.2.13	Costco Wholesale Corp. (COST)	N/A	\$1,001 - \$15,000	Dividends	None (or less than \$201)
2.2.14	Vanguard 500 Index Fund ETF Shares (VOO)	Yes	None (or less than \$1,001)		\$1,001 - \$2,500
2.3	Brokerage #4				
2.3.1	Fidelity Government Cash Reserves	Yes	\$1,001 - \$15,000		\$201 - \$1,000
2.3.2	Metropolitan Transn Auth NY Dedicated Cusip 59259NS38	N/A	None (or less than \$1,001)	Capital Gains Interest	\$201 - \$1,000
2.3.3	Metropolitan Transn Auth NY Dedicated Cusip 59259YTT6	N/A	None (or less than \$1,001)	Capital Gains Interest	\$201 - \$1,000
2.3.4	North Tex Twy Auth Rev Sys And Ref BDS Cusip 66285WWV4	N/A	None (or less than \$1,001)	Capital Gains Interest	\$1,001 - \$2,500
2.3.5	Massachusetts St Clean Wtr Tr St Cusip 575829DE3	N/A	None (or less than \$1,001)	Capital Gains Interest	\$1,001 - \$2,500
2.3.6	Massachusetts St Dev Fin Agy Rev Rev Bds Cusip 57584XXV8	N/A	None (or less than \$1,001)	Capital Gains Interest	\$1,001 - \$2,500
2.3.7	New Jersey St Covid 19 Go Emergency Bds Cusip 646039YM3	N/A	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500
2.3.8	Massachusetts St Go Bds Ser 2016A Cusip 57582RHG4	N/A	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
2.3.9	Boston Mass Wtr & Swr Commn Re V Gen Rev Cusip 101029TP1	N/A	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500
2.3.10	Dallas Fort Worth Tex Intl Arpt Rev JT Cusip 2350365D8	N/A	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500
2.3.11	Massachusetts St Sch Bldg Auth Dedicated Cusip 576000VT7	N/A	None (or less than \$1,001)	Capital Gains Interest	\$1,001 - \$2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.3.12	Connecticut St Spl Tax Oblig Rev Spl Cusip 207758UB7	N/A	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
2.3.13	University Mass Bldg Auth Rev Rev Bds Cusip 914437SY5	N/A	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
2.3.14	Massachusetts St Go Bds Ser A Cusip 57582RDX1	N/A	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500
2.3.15	Colorado Health Facs Auth Rev Bds Cusip 19648FKG8	N/A	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500
2.3.16	Louisville & Jefferson Cnty Ky Cusip 54659LBP6	N/A	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500
2.3.17	New York N Y City Transitional Fin Cusip 64971WU81	N/A	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000
2.3.18	University Mass Bldg Auth Proj Rev Sr Bds Cusip 914440RR5	N/A	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000
2.3.19	Massachusetts Bay Transn Auth Mass Cusip 575579K55	N/A	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000
2.3.20	Massachusetts St Go Consolidated Ln Bds Cusip 57582RPC4	N/A	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000
2.3.21	University Mass Bldg Auth Rev Ref Bds Cusip 914437TU2	N/A	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500
2.3.22	Massachusetts St Sch Bldg Auth Dedicated Cusip 576000SA2	N/A	None (or less than \$1,001)	Capital Gains Interest	\$5,001 - \$15,000
2.3.23	Utility Debt Securitization Auth Cusip 91802RCG2	N/A	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000
2.3.24	Comal Tex Indpt Sch Dist Unltd Tax Bldg Cusip 1998205C1	N/A	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
2.3.25	Maryland St Loc Facs Ln GO Bds Ser Cusip 574193UM8	See Endnote	N/A	Interest	\$1,001 - \$2,500

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.3.26	Massachusetts St Wtr Res Auth GO Rev Bds Cusip 576051PE0		N/A	\$50,001 - \$100,000		None (or less than \$201)
2.3.27	Maryland St Transn Auth Transn Facs Cusip 574300MB2		N/A	\$50,001 - \$100,000		None (or less than \$201)
2.3.28	Massachusetts St GO Consolidated Ln Bds Cusip 57582RU46		N/A	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
2.3.29	New York N Y GO Bds Ser Fiscal 2020 C-1 Cusip 64966QGY0		N/A	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
2.3.30	Dallas Tex Area Rapid Tran Sales Tax Cusip 235241UP9		N/A	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
2.3.31	Great Lakes Wtr Auth Mich Wtr Supply Sys Cusip 39081JFG8		N/A	\$50,001 - \$100,000		None (or less than \$201)
2.3.32	Salt Lake City Utah Arpt Rev Intl Bds Cusip 795576KT3	See Endnote	N/A	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500
2.3.33	Washington St Var Purp GO Bds Ser Cusip 93974EXL5		N/A	\$50,001 - \$100,000		None (or less than \$201)
2.3.34	Washington St Mvft Vrf GO Bds Ser 2021 Cusip 93974EKF2		N/A	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
2.3.35	Massachusetts St Dev Fin Agy Rev Rev Bds Cusip 57584Y3Q0		N/A	\$50,001 - \$100,000		None (or less than \$201)
2.3.36	Illinois St Toll Hwy Auth Toll Highway Cusip 452252PM5		N/A	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
2.3.37	Los Angeles Calif Dept Arpts Rev Sr Cusip 544445PR4		N/A	\$50,001 - \$100,000		None (or less than \$201)
2.3.38	Massachusetts St Clean Wtr Tr St Cusip 575829KP0		N/A	\$15,001 - \$50,000		None (or less than \$201)
2.4	Brokerage #5	See Endnote	No			
2.4.1	Idex Corp Com		N/A	None (or less than \$1,001)	Capital Gains Dividends	\$201 - \$1,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3	Family Trust #2	No			
3.1	Northern Funds US Govt Money Market Fund	Yes	\$15,001 - \$50,000		\$201 - \$1,000
3.2	Fidelity 500 Index-Instl Premium	Yes	\$250,001 - \$500,000		\$50,001 - \$100,000
3.3	Vanguard Mun Bd Fd Inc LTD Term Portfolio	Yes	\$100,001 - \$250,000		\$1,001 - \$2,500
4	U.S. bank account #1 (cash)	N/A	\$50,001 - \$100,000	Interest	None (or less than \$201)
5	The 18 Gardner Road Trust	No			
5.1	U.S. Bank account #2 (cash)	N/A	\$1,001 - \$15,000	Interest	\$201 - \$1,000
6	Crescent Ranch, Lafayette, LA	No			
6.1	Undeveloped 30 Acres, Lafayette, LA	N/A	None (or less than \$1,001)	Capital Gains	\$1,000,001 - \$5,000,000
7	Family Trust #3	No			
7.1	Undeveloped Land, Lafayette LA	N/A	\$50,001 - \$100,000	Capital Gains	\$15,001 - \$50,000
7.2	Fidelity Treasury Money Market Fund	Yes	\$15,001 - \$50,000		\$201 - \$1,000
8	Family Trust #4	No			
8.1	Undeveloped Land, Lafayette LA	N/A	\$500,001 - \$1,000,000	Capital Gains	\$100,001 - \$1,000,000
8.2	U.S. Bank account #5 (cash)	N/A	\$1,001 - \$15,000	Interest	None (or less than \$201)
8.3	Fidelity Treasury Money Market Fund	Yes	\$100,001 - \$250,000		\$1,001 - \$2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
9	Voyce, Inc. - Preferred Stock	See Endnote	N/A		None (or less than \$201)
10	Boheme Nominee Trust	No			
10.1	Residential Real Estate	N/A	\$1,000,001 - \$5,000,000	Rent or Royalties	\$100,001 - \$1,000,000
10.2	U.S. Bank Account #6 (cash)	N/A	\$1,001 - \$15,000		None (or less than \$201)
11	Bank of Austria (cash)	N/A	\$1,001 - \$15,000		None (or less than \$201)

7. Transactions

#	DESCRIPTION	TYPE	DATE	AMOUNT
1	MFS International Intrinsic Value Fund Class I Shares (MINIX)	Purchase	01/11/2022	\$1,001 - \$15,000
2	Vanguard Short-Term Bond Index Fund ETF Shares (BSV)	Purchase	01/11/2022	\$1,001 - \$15,000
3	Vanguard 500 Index Fund ETF Shares (VOO)	Purchase	01/11/2022	\$1,001 - \$15,000
4	Vanguard Small-Cap Index Fund ETF Shares (VB)	Purchase	01/11/2022	\$1,001 - \$15,000
5	PIMCO Inflation Response Multi-Asset Fund Institutional Class Shares (PIRMX)	Purchase	03/10/2022	\$1,001 - \$15,000
6	WCM Focused International Growth Fund Institutional Class Shares (WCMIX)	Sale	03/10/2022	\$15,001 - \$50,000
7	Baird Aggregate Bond Fund Institutional Class Shares (BAGIX)	Sale	04/01/2022	\$15,001 - \$50,000
8	Fidelity Advisor Total Bond Fund Class Z Shares (FBKWX)	Sale	04/01/2022	\$50,001 - \$100,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
9	Fidelity Advisor Limited Term Bond Fund Class Z Shares (FIKRX)	Purchase	04/05/2022	\$50,001 - \$100,000
10	Fidelity Conservative Income Bond Fund Institutional Class Shares (FCNVX)	Purchase	04/05/2022	\$15,001 - \$50,000
11	T Rowe Price Blue Chip Growth Fund, Inc Class I Shares (TBCIX)	Sale	06/22/2022	\$15,001 - \$50,000
12	Vanguard Equity Income Fund Admiral Shares (VEIRX)	Purchase	06/22/2022	\$15,001 - \$50,000
13	PIMCO Inflation Response Multi-Asset Fund Institutional Class Shares (PIRMX)	Sale	06/29/2022	\$15,001 - \$50,000
14	Vanguard Equity Income Fund Admiral Shares (VEIRX)	Purchase	06/29/2022	\$15,001 - \$50,000
15	Vanguard 500 Index Fund ETF Shares (VOO)	Purchase	08/10/2022	\$15,001 - \$50,000
16	Vanguard Mid-Cap Index Fund ETF Shares (VO)	Purchase	08/10/2022	\$1,001 - \$15,000
17	WCM Focused International Growth Fund Institutional Class Shares (WCMIX)	Sale	09/07/2022	\$1,001 - \$15,000
18	MFS International Intrinsic Value Fund Class I Shares (MINIX)	Sale	09/23/2022	\$1,001 - \$15,000
19	Vanguard Short-Term Bond Index Fund ETF Shares (BSV)	Purchase	09/23/2022	\$1,001 - \$15,000
20	Vanguard 500 Index Fund ETF Shares (VOO)	Sale	09/23/2022	\$1,001 - \$15,000
21	Vanguard Small-Cap Index Fund ETF Shares (VB)	Purchase	09/23/2022	\$1,001 - \$15,000
22	iShares Core S&P 500 ETF (IVV)	Purchase	11/14/2022	\$1,001 - \$15,000
23	Vanguard Real Estate Index Fund ETF Shares (VNQ)	Purchase	11/14/2022	\$1,001 - \$15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
24	WCM Focused International Growth Fund Institutional Class Shares (WCMIX)	Sale	03/09/2022	\$100,001 - \$250,000
25	PIMCO Inflation Response Multi-Asset Fund Institutional Class Shares (PIRMX)	Purchase	03/09/2022	\$15,001 - \$50,000
26	PIMCO Inflation Response Multi-Asset Fund Institutional Class Shares (PIRMX)	Sale	06/29/2022	\$250,001 - \$500,000
27	Vanguard Equity Income Fund Admiral Shares (VEIRX)	Purchase	06/29/2022	\$100,001 - \$250,000
28	Vanguard Mid-Cap Index Fund ETF Shares (VO)	Purchase	08/11/2022	\$50,001 - \$100,000
29	MFS International Intrinsic Value Fund Class I Shares (MINIX)	Sale	08/11/2022	\$15,001 - \$50,000
30	Vanguard Short-Term Bond Index Fund ETF Shares (BSV)	Sale	08/11/2022	\$15,001 - \$50,000
31	Vanguard 500 Index Fund ETF Shares (VOO)	Purchase	08/11/2022	\$50,001 - \$100,000
32	Vanguard Small-Cap Index Fund ETF Shares (VB)	Purchase	08/11/2022	\$1,001 - \$15,000
33	MFS International Intrinsic Value Fund Class I Shares (MINIX)	Sale	09/07/2022	\$100,001 - \$250,000
34	Fidelity Overseas Fund (FOSFX)	Sale	09/23/2022	\$50,001 - \$100,000
35	T Rowe Price QM US Sm-Cap Growth Eqty Fd, Incl CI Sh (TQAIX)	Purchase	09/23/2022	\$15,001 - \$50,000
36	Champlain Mid Cap Fund Institutional Shares (CIPIX)	Sale	10/28/2022	\$100,001 - \$250,000
37	Vanguard Mid-Cap Index Fund ETF Shares (VO)	Sale	10/28/2022	\$50,001 - \$100,000
38	iShares Core S&P Mid-Cap ETF (IJH)	Purchase	10/28/2022	\$250,001 - \$500,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
39	Champlain Mid Cap Fund Institutional Shares (CIPIX)	Purchase	12/28/2022	\$100,001 - \$250,000
40	Vanguard Mid-Cap Index Fund ETF Shares (VO)	Purchase	12/28/2022	\$50,001 - \$100,000
41	iShares Core S&P Mid-Cap ETF (IJH)	Sale	12/28/2022	\$250,001 - \$500,000
42	Vanguard 500 Index Fund ETF Shares (VOO)	Purchase	10/28/2022	\$50,001 - \$100,000
43	Vanguard 500 Index Fund ETF Shares (VOO)	Sale	11/29/2022	\$50,001 - \$100,000
44	WASHINGTON ST MVFT VRF GO BDS SER. 2021 05.00000% 06/01/2038 B Cusip 93974EKF2 See Endnote	Purchase	11/04/2022	\$50,001 - \$100,000
45	Fidelity 500 Index Fund (FXAIX)	Sale	03/28/2022	\$15,001 - \$50,000
46	Fidelity 500 Index Fund (FXAIX)	Sale	06/17/2022	\$15,001 - \$50,000
47	Fidelity 500 Index Fund (FXAIX)	Sale	12/08/2022	\$15,001 - \$50,000
48	Undeveloped 30 Acres, Lafayette, LA	Sale	08/15/2022	\$1,000,001 - \$5,000,000
49	Undeveloped Land, Lafayette, LA (Family Trust #3)	Sale	06/25/2022	\$1,001 - \$15,000
50	Undeveloped Land, Lafayette, LA (Family Trust #3)	Sale	07/27/2022	\$1,001 - \$15,000
51	Undeveloped Land, Lafayette, LA (Family Trust #3)	Sale	08/04/2022	\$1,001 - \$15,000
52	Undeveloped Land, Lafayette, LA (Family Trust #3)	Sale	09/30/2022	\$15,001 - \$50,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
53	Undeveloped Land, Lafayette, LA (Family Trust #4)	Sale	06/25/2022	\$50,001 - \$100,000
54	Undeveloped Land, Lafayette, LA (Family Trust #4)	Sale	07/27/2022	\$50,001 - \$100,000
55	Undeveloped Land, Lafayette, LA (Family Trust #4)	Sale	08/04/2022	\$15,001 - \$50,000
56	Undeveloped Land, Lafayette, LA (Family Trust #4)	Sale	09/30/2022	\$100,001 - \$250,000

8. Liabilities

#	CREDITOR NAME	TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
1	Cambridge Trust, Cambridge, MA	Mortgage on Personal Residence	\$250,001 - \$500,000	2019	3.125%	7/1 ARM
2	Cambridge Trust, Cambridge, MA	Home Equity Line of Credit	\$100,001 - \$250,000	2021	Prime less 0.5%	20 years

9. Gifts and Travel Reimbursements

None

Endnotes

PART	#	ENDNOTE
1.	4	The Trust has not been terminated. This report corrects an earlier inadvertent error regarding the date.

PART	#	ENDNOTE
1.	6	Filer was added as a co-trustee in 2022 for administrative reasons , but the status of the underlying asset has remained unchanged since inception of the trust in 2019. The underlying asset is not reportable.
2.	1	This is a business consulting entity previously known as VR Kennedy Strategies LLC. Filer has a strictly passive ownership interest in this LLC, performing no management duties and providing no client services.
2.	1.1	Compensation for Board services rendered in 2021. Filer resigned from Board in November 2021 and no further compensation is due or owing.
3.	1	Acadia Strategies LLC was formerly known as VR Kennedy Strategies LLC. The LLC has a ten-year profit interest in business generated from successful referrals to Voyce, Inc. Income reported for the LLC represents business income.
6.	2.3.25	Acquired after filing of Nominee Report and prior to reporting period covered in this filing.
6.	2.3.32	Acquired after filing of Nominee Report and prior to reporting period covered in this filing.
6.	2.4	All assets in this account have been sold or transferred. The account was closed 10/2022.
6.	9	Voyce, Inc. provides video and audio remote language translation services for health care, legal and business clients.
7.	44	Transaction was inadvertently omitted from Periodic Transaction Report filed November 8, 2022.

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 \$415 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.
- Travel reimbursements totaling more than \$415 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 \$166 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. app. § 101 et seq., as amended by the 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 13770 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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