Executive Branch Personnel

Public Financial Disclosure Report (OGE Form 278e)

Filer's Information

Leach, Jennifer

Associate Director, Consumer & Business Education, Bur. of Cons. Protection, Federal Trade Commission

Report Year: 2023

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/ Leach, Jennifer [electronically signed on 04/30/2023 by Leach, Jennifer 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/ Pankey, Lorielle L, Certifying Official [electronically signed on 06/16/2023 by Pankey, Lorielle L in Integrity.gov]

Other review conducted by
/s/ Bannon, Craig, Ethics Official [electronically signed on 06/16/2023 by Bannon, Craig in Integrity.gov]

U.S. Office of Government Ethics Certification

Data Revised 06/16/2023

1. Filer's Positions Held Outside United States Government

None

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

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	IRA		No			
1.1	iShares MSCI EAFE Value ETF (EFV)		Yes	$1,001 - $15,000		None (or less than $201)
1.2	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)		Yes	$15,001 - $50,000		None (or less than $201)
1.3	Vanguard Value Index Fund ETF Shares (VTV)		Yes	$15,001 - $50,000		None (or less than $201)
1.4	Akre Focus Fund Institutional Class Shares (AKRIX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
1.5	Edgewood Growth Fund Institutional Class Shares (EGFIX)		Yes	$1,001 - $15,000		None (or less than $201)
1.6	Goldman Sachs GQG Partners International Opportunities Fund Institutional Class Shs (GSIMX)		Yes	$1,001 - $15,000		None (or less than $201)
1.7	John Hancock Funds III International Growth Fund Class I Shares (GOGIX)		Yes	$1,001 - $15,000		None (or less than $201)
1.8	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)		Yes	$15,001 - $50,000		None (or less than $201)
1.9	PIMCO Income Fund Institutional Class Shares (PIMIX)		Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.10	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX)	Yes	$1,001 - $15,000		None (or less than $201)
1.11	Artisan International Small-Mid Fund Institutional Shares (APHJX)	Yes	$1,001 - $15,000		None (or less than $201)
1.12	Artisan International Value Fund Institutional Shares (APHKX)	Yes	$15,001 - $50,000		None (or less than $201)
1.13	Western Asset Core Plus Bond Fund Class I Shares (WACPX)	Yes	$1,001 - $15,000		None (or less than $201)
1.14	Fairlead Tactical Sector ETF Fairlead Tactical Sector ETF (TACK)	Yes	$15,001 - $50,000		None (or less than $201)
1.15	iShares Core S&P Mid-Cap ETF (IJH)	Yes	$1,001 - $15,000		None (or less than $201)
1.16	iShares Core S&P Small-Cap ETF (IJR)	Yes	$1,001 - $15,000		None (or less than $201)
1.17	iShares Ultra Short-Term Bond ETF (ICSH)	Yes	$1,001 - $15,000		None (or less than $201)
1.18	SPDR Portfolio S&P 500 Growth ETF (SPYG)	Yes	$1,001 - $15,000		None (or less than $201)
1.19	SPDR Portfolio Long Term Treasury ETF (SPTL)	Yes	$1,001 - $15,000		None (or less than $201)
1.20	Vanguard Growth Index Fund ETF Class Shares (VUG)	Yes	$1,001 - $15,000		None (or less than $201)
1.21	MetWest Flexible Income Fund Class I Shares (MWFEX)	Yes	$1,001 - $15,000		None (or less than $201)
2	AARP, defined benefit plan (value not readily ascertainable) Approximately $11,500 annually at age 65	N/A			None (or less than $201)
3	Beneficiary IRA	No		cash distributions	$3,474

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3.1	iShares MSCI EAFE Value ETF (EFV)	Yes	$1,001 - $15,000		None (or less than $201)
3.2	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	Yes	$1,001 - $15,000		None (or less than $201)
3.3	Vanguard Value Index Fund ETF Shares (VTV)	Yes	$1,001 - $15,000		None (or less than $201)
3.4	Akre Focus Fund Institutional Class Shares (AKRIX)	Yes	$1,001 - $15,000		None (or less than $201)
3.5	Edgewood Growth Fund Institutional Class Shares (EGFIX)	Yes	$1,001 - $15,000		None (or less than $201)
3.6	Goldman Sachs GQG Partners International Opportunities Fund Institutional Class Shs (GSIMX)	Yes	$1,001 - $15,000		None (or less than $201)
3.7	John Hancock Funds III International Growth Fund Class I Shares (GOGIX)	Yes	$1,001 - $15,000		None (or less than $201)
3.8	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)	Yes	$1,001 - $15,000		None (or less than $201)
3.9	PIMCO Income Fund Institutional Class Shares (PIMIX)	Yes	$1,001 - $15,000		None (or less than $201)
3.10	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX)	Yes	$1,001 - $15,000		None (or less than $201)
3.11	Artisan International Small-Mid Fund Institutional Shares (APHJX)	Yes	$1,001 - $15,000		None (or less than $201)
3.12	Artisan International Value Fund Institutional Shares (APHKX)	Yes	$1,001 - $15,000		None (or less than $201)
3.13	Western Asset Core Plus Bond Fund Class I Shares (WACPX)	Yes	$1,001 - $15,000		None (or less than $201)
3.14	Fairlead Tactical Sector ETF Fairlead Tactical Sector ETF (TACK)	Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3.15	iShares Core S&P Mid-Cap ETF (IJH)	Yes	$1,001 - $15,000		None (or less than $201)
3.16	iShares Core S&P Small-Cap ETF (IJR)	Yes	$1,001 - $15,000		None (or less than $201)
3.17	iShares Ultra Short-Term Bond ETF (ICSH)	Yes	$1,001 - $15,000		None (or less than $201)
3.18	SPDR Portfolio S&P 500 Growth ETF (SPYG)	Yes	$1,001 - $15,000		None (or less than $201)
3.19	SPDR Portfolio Long Term Treasury ETF (SPTL)	Yes	$1,001 - $15,000		None (or less than $201)
3.20	Vanguard Growth Index Fund ETF Class Shares (VUG)	Yes	$1,001 - $15,000		None (or less than $201)
3.21	MetWest Flexible Income Fund Class I Shares (MWFEX)	Yes	$1,001 - $15,000		None (or less than $201)

3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	AARP	Washington, District of Columbia	I will continue to participate in this defined benefit plan.	1/2000

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

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Sirius XM Holdings, Inc. (SIRI)	N/A		Salary	
2	IRA	No			
2.1	iShares MSCI EAFE Value ETF (EFV)	Yes	$15,001 - $50,000		None (or less than $201)
2.2	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	Yes	$15,001 - $50,000		None (or less than $201)
2.3	Vanguard Value Index Fund ETF Shares (VTV)	Yes	$15,001 - $50,000		None (or less than $201)
2.4	Akre Focus Fund Institutional Class Shares (AKRIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.5	Edgewood Growth Fund Institutional Class Shares (EGFIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.6	Goldman Sachs GQG Partners International Opportunities Fund Institutional Class Shs (GSIMX)	Yes	$1,001 - $15,000		None (or less than $201)
2.7	John Hancock Funds III International Growth Fund Class I Shares (GOGIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.8	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.9	PIMCO Income Fund Institutional Class Shares (PIMIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.10	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX)	Yes	$1,001 - $15,000		None (or less than $201)
2.11	Artisan International Small-Mid Fund Institutional Shares (APHJX)	Yes	$1,001 - $15,000		None (or less than $201)
2.12	Artisan International Value Fund Institutional Shares (APHKX)	Yes	$15,001 - $50,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.13	Western Asset Core Plus Bond Fund Class I Shares (WACPX)		Yes	$1,001 - $15,000		None (or less than $201)
2.14	Fairlead Tactical Sector ETF Fairlead Tactical Sector ETF (TACK)		Yes	$15,001 - $50,000		None (or less than $201)
2.15	iShares Core S&P Mid-Cap ETF (IJH)		Yes	$1,001 - $15,000		None (or less than $201)
2.16	iShares Core S&P Small-Cap ETF (IJR)		Yes	$1,001 - $15,000		None (or less than $201)
2.17	iShares Ultra Short-Term Bond ETF (ICSH)		Yes	$1,001 - $15,000		None (or less than $201)
2.18	SPDR Portfolio S&P 500 Growth ETF (SPYG)		Yes	$1,001 - $15,000		None (or less than $201)
2.19	SPDR Portfolio Long Term Treasury ETF (SPTL)		Yes	$1,001 - $15,000		None (or less than $201)
2.20	Vanguard Growth Index Fund ETF Class Shares (VUG)		Yes	$1,001 - $15,000		None (or less than $201)
2.21	MetWest Flexible Income Fund Class I Shares (MWFEX)		Yes	$1,001 - $15,000		None (or less than $201)
3	Sirius XM Holdings, Inc., 401(k)		No			
3.1	JPMorgan Large Cap Growth Fund Class R6 Shares (JLGMX)		Yes	$15,001 - $50,000		None (or less than $201)
4	TekSystems 401(k)		No			
4.1	Northern Funds Stock Index Fund (NOSIX)		Yes	$15,001 - $50,000		None (or less than $201)
5	Sirius XM Holdings, Inc. (SIRI), unvested restricted stock units	See Endnote	N/A	$15,001 - $50,000		None (or less than $201)
5.1	Sirius XM Holdings, Inc. (SIRI)	See Endnote	N/A	$1,001 - $15,000		None (or less than $201)

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	U.S. bank account #1 (cash)	N/A	$50,001 - $100,000	Interest	$201 - $1,000

7. Transactions

#	DESCRIPTION	TYPE	DATE	AMOUNT
1	Vanguard Intermediate-Term Bond Index Fund ETF Shares (BIV)	Sale	01/04/2022	$1,001 - $15,000
2	Vanguard Mid-Cap Index Fund ETF Shares (VO)	Sale	05/23/2022	$1,001 - $15,000
3	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO)	Sale	05/23/2022	$1,001 - $15,000
4	Guggenheim Total Return Bond Fund Institutional Class Shares (GIBIX)	Sale	05/23/2022	$1,001 - $15,000
5	Loomis Sayles Core Plus Bond Fund Class N Shares (NERNX)	Sale	05/23/2022	$1,001 - $15,000
6	Brown Capital Management International Small Company Fund Inst Shares (BCSFX)	Sale	02/16/2022	$1,001 - $15,000
7	PIMCO International Bond Fund (Unhedged) Institutional (PFUIX)	Sale	05/23/2022	$1,001 - $15,000
8	T Rowe Price Blue Chip Growth Fund, Inc Class I Shares (TBCIX)	Sale	01/04/2022	$1,001 - $15,000
9	Brown Capital Management Small Company Fund Institutional Share (BCSSX)	Sale	02/16/2022	$1,001 - $15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
10	Akre Focus Fund Institutional Class Shares (AKRIX)	Sale	02/16/2022	$1,001 - $15,000
11	Edgewood Growth Fund Institutional Class Shares (EGFIX)	Sale	02/16/2022	$1,001 - $15,000
12	John Hancock Funds III International Growth Fund Class I Shares (GOGIX)	Sale	05/23/2022	$1,001 - $15,000
13	MetWest Flexible Income Fund Class I Shares (MWFEX)	Purchase	01/06/2022	$1,001 - $15,000
14	MetWest Flexible Income Fund Class I Shares (MWFEX)	Sale	10/17/2022	$1,001 - $15,000
15	PIMCO Income Fund Institutional Class Shares (PIMIX)	Sale	10/17/2022	$1,001 - $15,000
16	Vanguard Growth Index Fund ETF Class Shares (VUG)	Purchase	01/04/2022	$1,001 - $15,000
17	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV)	Sale	05/23/2022	$1,001 - $15,000
18	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO)	Sale	05/23/2022	$1,001 - $15,000
19	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO)	Purchase	02/16/2022	$1,001 - $15,000
20	Vanguard S&P 500 Growth Index Fund ETF Shares (VOOG)	Purchase	02/16/2022	$1,001 - $15,000
21	Vanguard S&P 500 Growth Index Fund ETF Shares (VOOG)	Sale	05/23/2022	$1,001 - $15,000
22	Vanguard S&P 500 Growth Index Fund ETF Shares (VOOG)	Purchase	02/18/2022	$1,001 - $15,000
23	Vanguard Value Index Fund ETF Shares (VTV)	Sale	01/04/2022	$1,001 - $15,000
24	Fairlead Tactical Sector ETF Fairlead Tactical Sector ETF (TACK)	Purchase	05/23/2022	$15,001 - $50,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
25	iShares MSCI EAFE Value ETF (EFV)	Purchase	02/16/2022	$1,001 - $15,000
26	iShares MSCI EAFE Value ETF (EFV)	Purchase	10/17/2022	$1,001 - $15,000
27	iShares Core S&P Small-Cap ETF (IJR)	Purchase	05/23/2022	$1,001 - $15,000
28	iShares Core S&P Mid-Cap ETF (IJH)	Purchase	05/23/2022	$1,001 - $15,000
29	iShares Ultra Short-Term Bond ETF (ICSH)	Purchase	05/25/2022	$1,001 - $15,000
30	SPDR Portfolio Long Term Treasury ETF (SPTL)	Purchase	10/19/2022	$1,001 - $15,000
31	SPDR Portfolio S&P 500 Growth ETF (SPYG)	Purchase	01/23/2022	$1,001 - $15,000
32	SPDR Portfolio S&P 500 Growth ETF (SPYG)	Purchase	05/23/2022	$1,001 - $15,000
33	Artisan International Value Fund Institutional Shares (APHKX)	Purchase	01/04/2022	$1,001 - $15,000
34	Artisan International Small-Mid Fund Institutional Shares (APHJX)	Purchase	10/17/2022	$1,001 - $15,000
35	Edgewood Growth Fund Institutional Class Shares (EGFIX)	Purchase	01/04/2022	$1,001 - $15,000
36	Goldman Sachs GQG Partners International Opportunities Fund Institutional Class Shs (GSIMX)	Purchase	05/23/2022	$1,001 - $15,000
37	John Hancock Funds III International Growth Fund Class I Shares (GOGIX)	Purchase	01/04/2022	$1,001 - $15,000
38	MetWest Flexible Income Fund Class I Shares (MWFEX)	Purchase	05/23/2022	$1,001 - $15,000
39	PIMCO Income Fund Institutional Class Shares (PIMIX)	Purchase	05/23/2022	$1,001 - $15,000
40	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX)	Purchase	01/04/2022	$1,001 - $15,000
41	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX)	Purchase	05/23/2022	$1,001 - $15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
42	JPMorgan Large Cap Growth Fund Class R6 Shares (JLGMX)	Purchase	02/10/2022	$1,001 - $15,000
43	Akre Focus Fund Institutional Class Shares (AKRIX) IRA	Sale	02/16/2022	$1,001 - $15,000
44	Brown Capital Management Small Company Fund Institutional Share (BCSSX) IRA	Sale	02/16/2022	$1,001 - $15,000
45	Brown Capital Management International Small Company Fund Inst Shares (BCSFX) IRA	Sale	02/16/2022	$1,001 - $15,000
46	Edgewood Growth Fund Institutional Class Shares (EGFIX) IRA	Sale	02/16/2022	$1,001 - $15,000
47	Edgewood Growth Fund Institutional Class Shares (EGFIX) IRA	Sale	05/23/2022	$1,001 - $15,000
48	Guggenheim Total Return Bond Fund Institutional Class Shares (GIBIX) IRA	Sale	05/23/2022	$1,001 - $15,000
49	John Hancock Funds III International Growth Fund Class I Shares (GOGIX) IRA	Sale	05/23/2022	$1,001 - $15,000
50	Loomis Sayles Core Plus Bond Fund Class N Shares (NERNX) IRA	Sale	05/23/2022	$1,001 - $15,000
51	PIMCO International Bond Fund (Unhedged) Institutional (PFUIX) IRA	Sale	05/23/2022	$1,001 - $15,000
52	T Rowe Price Blue Chip Growth Fund, Inc Class I Shares (TBCIX) IRA	Sale	01/04/2022	$1,001 - $15,000
53	Vanguard Intermediate-Term Bond Index Fund ETF Shares (BIV) IRA	Sale	01/04/2022	$1,001 - $15,000
54	Vanguard Mid-Cap Index Fund ETF Shares (VO) IRA	Sale	05/23/2022	$1,001 - $15,000
55	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO) IRA	Sale	05/23/2022	$15,001 - $50,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
56	Vanguard S&P 500 Growth Index Fund ETF Shares (VOOG) IRA	Sale	05/23/2022	$1,001 - $15,000
57	Artisan International Value Fund Institutional Shares (APHKX) IRA	Sale	05/23/2022	$1,001 - $15,000
58	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX) IRA	Sale	05/23/2022	$1,001 - $15,000
59	MetWest Flexible Income Fund Class I Shares (MWFEX) IRA	Sale	10/17/2022	$1,001 - $15,000
60	PIMCO Income Fund Institutional Class Shares (PIMIX) IRA	Sale	10/17/2022	$1,001 - $15,000
61	Vanguard Growth Index Fund ETF Class Shares (VUG) IRA	Sale	05/23/2022	$1,001 - $15,000
62	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV) IRA	Sale	05/23/2022	$1,001 - $15,000
63	Vanguard Value Index Fund ETF Shares (VTV) IRA	Sale	01/04/2022	$1,001 - $15,000
64	Akre Focus Fund Institutional Class Shares (AKRIX) bene	Sale	02/16/2022	$1,001 - $15,000
65	Brown Capital Management Small Company Fund Institutional Share (BCSSX) bene	Sale	02/16/2022	$1,001 - $15,000
66	Brown Capital Management International Small Company Fund Inst Shares (BCSFX) bene	Sale	02/16/2022	$1,001 - $15,000
67	Edgewood Growth Fund Institutional Class Shares (EGFIX) bene	Sale	02/16/2022	$1,001 - $15,000
68	Guggenheim Total Return Bond Fund Institutional Class Shares (GIBIX) bene	Sale	05/23/2022	$1,001 - $15,000
69	John Hancock Funds III International Growth Fund Class I Shares (GOGIX) bene	Sale	05/23/2022	$1,001 - $15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
70	Loomis Sayles Core Plus Bond Fund Class N Shares (NERNX) bene	Sale	05/23/2022	$1,001 - $15,000
71	PIMCO International Bond Fund (Unhedged) Institutional (PFUIX) bene	Sale	05/23/2022	$1,001 - $15,000
72	T Rowe Price Blue Chip Growth Fund, Inc Class I Shares (TBCIX) bene	Sale	01/04/2022	$1,001 - $15,000
73	Vanguard Intermediate-Term Bond Index Fund ETF Shares (BIV) bene	Sale	01/04/2022	$1,001 - $15,000
74	Vanguard Mid-Cap Index Fund ETF Shares (VO) bene	Sale	05/23/2022	$1,001 - $15,000
75	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO) bene	Sale	05/23/2022	$1,001 - $15,000
76	Vanguard S&P 500 Growth Index Fund ETF Shares (VOOG) bene	Sale	05/23/2022	$1,001 - $15,000
77	Fairlead Tactical Sector ETF Fairlead Tactical Sector ETF (TACK) IRA	Purchase	05/23/2022	$15,001 - $50,000
78	iShares MSCI EAFE Value ETF (EFV) IRA	Purchase	02/16/2022	$1,001 - $15,000
79	iShares MSCI EAFE Value ETF (EFV) IRA	Purchase	10/17/2022	$1,001 - $15,000
80	iShares Core S&P Small-Cap ETF (IJR) IRA	Purchase	05/23/2022	$1,001 - $15,000
81	iShares Core S&P Mid-Cap ETF (IJH) IRA	Purchase	05/23/2022	$1,001 - $15,000
82	iShares Ultra Short-Term Bond ETF (ICSH) IRA	Purchase	05/25/2022	$1,001 - $15,000
83	SPDR Portfolio Long Term Treasury ETF (SPTL) IRA	Purchase	10/19/2022	$1,001 - $15,000
84	SPDR Portfolio S&P 500 Growth ETF (SPYG) IRA	Purchase	05/23/2022	$1,001 - $15,000
85	Vanguard Growth Index Fund ETF Class Shares (VUG) IRA	Purchase	01/04/2022	$1,001 - $15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
86	Vanguard Russell 1000 Value Index Fund ETF Shares (VONV) IRA	Purchase	01/20/2022	$15,001 - $50,000
87	John Hancock Funds III International Growth Fund Class I Shares (GOGIX) IRA	Purchase	01/04/2022	$1,001 - $15,000
88	John Hancock Funds III International Growth Fund Class I Shares (GOGIX) IRA	Purchase	10/17/2022	$1,001 - $15,000
89	MetWest Flexible Income Fund Class I Shares (MWFEX) IRA	Purchase	01/06/2022	$1,001 - $15,000
90	MetWest Flexible Income Fund Class I Shares (MWFEX) IRA	Purchase	05/23/2022	$1,001 - $15,000
91	PIMCO Income Fund Institutional Class Shares (PIMIX) IRA	Purchase	05/23/2022	$1,001 - $15,000
92	Edgewood Growth Fund Institutional Class Shares (EGFIX) IRA	Purchase	01/04/2022	$1,001 - $15,000
93	Goldman Sachs GQG Partners International Opportunities Fund Institutional Class Shs (GSIMX) IRA	Purchase	05/23/2022	$1,001 - $15,000
94	Goldman Sachs GQG Partners International Opportunities Fund Institutional Class Shs (GSIMX) IRA	Purchase	10/17/2022	$1,001 - $15,000
95	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX) IRA	Purchase	01/04/2022	$1,001 - $15,000
96	T Rowe Price New Horizons Fund, Inc Class I Shares (PRJIX) IRA	Purchase	05/23/2022	$1,001 - $15,000
97	Fairlead Tactical Sector ETF Fairlead Tactical Sector ETF (TACK) bene	Purchase	05/23/2022	$1,001 - $15,000
98	iShares MSCI EAFE Value ETF (EFV) bene	Purchase	02/16/2022	$1,001 - $15,000
99	iShares Core S&P Small-Cap ETF (IJR) bene	Purchase	05/23/2022	$1,001 - $15,000
100	iShares Core S&P Mid-Cap ETF (IJH) bene	Purchase	05/23/2022	$1,001 - $15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
101	iShares Ultra Short-Term Bond ETF (ICSH) bene	Purchase	05/25/2022	$1,001 - $15,000
102	SPDR Portfolio Long Term Treasury ETF (SPTL) bene	Purchase	10/19/2022	$1,001 - $15,000
103	SPDR Portfolio S&P 500 Growth ETF (SPYG) bene	Purchase	05/23/2022	$1,001 - $15,000
104	Vanguard Growth Index Fund ETF Class Shares (VUG) bene	Purchase	01/04/2022	$1,001 - $15,000
105	John Hancock Funds III International Growth Fund Class I Shares (GOGIX) bene	Purchase	01/04/2022	$1,001 - $15,000
106	MetWest Flexible Income Fund Class I Shares (MWFEX) bene	Purchase	01/06/2022	$1,001 - $15,000
107	PIMCO Income Fund Institutional Class Shares (PIMIX) bene	Purchase	05/23/2022	$1,001 - $15,000
108	Vanguard S&P Small-Cap 600 Index Fund ETF Shares (VIOO) IRA	Purchase	02/16/2022	$1,001 - $15,000
109	Vanguard S&P 500 Growth Index Fund ETF Shares (VOOG) IRA	Purchase	02/16/2022	$1,001 - $15,000
110	Vanguard S&P 500 Growth Index Fund ETF Shares (VOOG) IRA	Purchase	02/18/2022	$1,001 - $15,000
111	Vanguard S&P 500 Growth Index Fund ETF Shares (VOOG) bene	Purchase	02/16/2022	$1,001 - $15,000
112	Vanguard S&P 500 Growth Index Fund ETF Shares (VOOG) bene	Purchase	02/18/2022	$1,001 - $15,000

8. Liabilities

None

9. Gifts and Travel Reimbursements

None

Endnotes

PART	#	ENDNOTE
2.	1.4	Shares lost value.
5.	5	RSUs created in 2021 and 2022 - not distributed, not vested.
5.	5.1	stock acquired through vesting of restricted stock units

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.

Public Burden Information

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