

Report Type: Nominee Report

Year (Annual Report only):

Date of Appointment:

Date of Termination:

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

### Filer's Information

---

Kennedy, Robert

Secretary, Department of Health & Human Services

---

Other Federal Government Positions Held During the Preceding 12 Months:

None

---

Names of Congressional Committees Considering Nomination:

- Committee on Finance
- 

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, Robert [electronically signed on 12/21/2024 by Kennedy, Robert 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/ Hall, Randall, Certifying Official [electronically signed on 01/21/2025 by Hall, Randall in Integrity.gov]

---

Other review conducted by

/s/ Hall, Randall, Ethics Official [electronically signed on 01/21/2025 by Hall, Randall in Integrity.gov]

---

U.S. Office of Government Ethics Certification

/s/ Huitema, David, Certifying Official [electronically signed on 01/21/2025 by Huitema, David in Integrity.gov]

## 1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME	CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
1	Bedford Stuyvesant Restoration Corporation	Brooklyn, New York	Non-Profit	Board Member (uncompensated)	3/2000	3/2022
2	Children's Health Defense f/k/a World Mercury Project	Franklin Lakes, New Jersey	Non-Profit	Chairman of the Board & Chief Legal Counsel	5/2016	12/2024
3	J W Howard Attorneys	Los Angeles, California	Law Firm	Attorney (Of Counsel)	1/2023	Present
4	Kennedy & Madonna, LLP	Hurley, New York	Law Firm	Partner	12/2000	Present
5	Kenviron Consulting LLC	New York, New York	Consulting Firm	Sole Member	11/2008	Present
6	Marwood Group LLC	New York, New York	Consulting Firm	Consultant	5/2001	3/2023
7	Morgan & Morgan, P.A.	Orlando, Florida	Law Firm	Of Counsel	3/2016	3/2022
8	Morgan & Morgan, P.A.	Orlando, Florida	Law Firm	Co-Counsel on Contingency Fee Cases	3/2023	Present
9	Robert F Kennedy, Jr 1986 Trust (Family Trust #1)	New York, New York	Trust	Trustee (uncompensated)	12/1986	Present
10	Skyhorse Publishing Inc	New York, New York	Corporation	Consultant/Author	8/2022	Present
11	WisnerBaum f/k/a Baum Hedlund Aristei & Goldman	Los Angeles, California	Law Firm	Consultant	9/2016	Present
12	WKP Ventures, LLC	New York, New York	Investments	Sole Member	9/2021	9/2024

#	ORGANIZATION NAME	CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
13	Family Trust #7	Los Angeles, California	Trust	Co-Trustee, second Trustee is Spouse (uncompensated)	1/2019	Present
14	GridBright Inc	Alamo, California	Corporation	Board Member	11/2016	3/2022

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

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Children's Health Defense f/k/a World Mercury Project	N/A		Salary/Bonus	\$326,056
2	J W Howard Attorneys (law firm)	N/A		Salary	\$481,732
3	Kennedy & Madonna, LLP	N/A		Share of Partnership profits	\$8,848,402
3.1	Kennedy & Madonna, LLP - contingency fee cases	See Endnote	N/A	\$1,000,001 - \$5,000,000	None (or less than \$201)
3.2	Kennedy & Madonna, LLP - contingency fee cases, value not easily ascertainable	See Endnote	N/A		None (or less than \$201)
4	Keppler Associates, Inc - Speakers' Bureau	No			
4.1	Hillsdale College, Hillsdale, Michigan - March 5, 2023	N/A		Speaking Fees	\$12,000
5	Marwood Group LLC - Healthcare Advisory and Consulting	N/A		Consulting Fees	\$30,000
6	National Resources Defense Council Inc Defined Benefit Plan	N/A	\$250,001 - \$500,000	Distributions	\$28,651

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7	Skyhorse Publishing Inc - Publisher	N/A		Consulting Fees for author introductions, book ideas and forewords to other authors' works & bonus.	\$451,000
8	WisnerBaum f/k/a Baum Hedlund Aristei & Goldman - Law Firm	N/A		Payment of Referral Fees On Contingency Fee Cases	\$856,559
8.1	WisnerBaum f/k/a Baum Hedlund Aristei & Goldman - contingency fee cases,value not easily ascertainable	N/A			None (or less than \$201)
9	SEP IRA	No			
9.1	Fidelity 500 Index Fund (FXAIX)	Yes	\$50,001 - \$100,000		None (or less than \$201)
9.2	Vanguard Total Stock Market Index Admiral (VTSAX)	Yes	\$50,001 - \$100,000		None (or less than \$201)
10	"Saint Francis of Assisi" - Skyhorse Publishing - value not readily ascertainable	N/A			None (or less than \$201)
11	"Robert Smalls:Civil War Hero" - Skyhorse Publishing - value not readily ascertainable	N/A			None (or less than \$201)
12	"Joshua Lawrence Chamberlain" - Skyhorse Publishing - value not readily ascertainable	N/A			None (or less than \$201)
13	"Climate in Crisis" - retitled of "Horsemen of the Apocalypse" - co-author (50% interest) - Skyhorse Publishing - value not readily ascertainable	N/A			None (or less than \$201)
14	"Judge Frank M Johnson Jr,a biography" - G P Putnam & Sons - value not readily ascertainable	N/A			None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
15	"The River Keepers" - Scribner Press - value not readily ascertainable	N/A			None (or less than \$201)
16	"This Fine Piece of Water" - Yale University Press - value not readily ascertainable	N/A			None (or less than \$201)
17	"Troubled Water:Saints, Sinners, Truths and Lies" - Anita Roddick Books - value not readily ascertainable	N/A			None (or less than \$201)
18	"Crimes Against Nature" - Harper Books - value not readily ascertainable	N/A			None (or less than \$201)
19	"Air America: The Playbook" - Rodale Books - value not readily ascertainable	N/A			None (or less than \$201)
20	"Thimerosal:Let the Science Speak" - Harper Books - value not readily ascertainable	N/A			None (or less than \$201)
21	"Framed:Why Michael Skakel Spent Over a Decade in Prison for a Murder He Did Not Commit" - Skyhorse Publishing - value not readily ascertainable	N/A			None (or less than \$201)
22	"Vaccine Villains:What the American Public Should Know about the Industry" - Skyhorse Publishing - value not readily ascertainable	N/A			None (or less than \$201)
23	"American Values:Lessons I Learned from my Family" - Skyhorse Publishing - value not readily ascertainable	N/A			None (or less than \$201)
24	"Vax-UnVax: Let the Science Speak" - Skyhorse Publishing - value not readily ascertainable	N/A		Book Advance	\$1,000
25	Trending 911 Inc. Endorsement Agreement for Boxbollen Products	See Endnote	N/A	Endorsement	\$100,000
26	Over the Horizon Action - Rockbridge Fall Summit, Speech 11/7/2024	N/A		Speaking Fees	\$100,000
27	Genius Network - Speech 11/9/2024	N/A		Speaking Fees	\$100,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
28	IRA #3 (Rollover from Pace 403b)	No			
28.1	Fidelity 500 Index Fund (FXAIX)	Yes	\$250,001 - \$500,000		None (or less than \$201)
28.2	Fidelity Gov Cash Reserve	Yes	\$1,001 - \$15,000		None (or less than \$201)
29	Kenviron Consulting LLC - Environmental Consulting Firm (dormant)	N/A	None (or less than \$1,001)		None (or less than \$201)
30	AbTech Industries, INC. (Account Receivable) See Endnote	N/A	\$50,001 - \$100,000		None (or less than \$201)
31	"Unsettled Science" Skyhorse Publishing-advance owed See Endnote	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
32	"A Defense for Israel" Skyhorse Publishing-advance owed See Endnote	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
33	"America's Path Back to Moral Leadership" Skyhorse Publishing - advance owed See Endnote	N/A	\$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	Children's Health Defense f/k/a World Mercury Project	Franklin Lakes, New Jersey	Leave of Absence Agreement, effective 4/1/23. Leave was unpaid and without any benefits, or other compensation. Filer resigned effective December 2024.	3/2023
2	J W Howard Attorneys	Los Angeles, California	J W Howard Attorneys employed me from January 1, 2023 until December 2023. In December 2024, JW Howard Attorneys made a final payment of employee compensation to me. Since December 2023, J W Howard Attorneys has not employed me or compensated me for my services, but I have continued to serve as Of Counsel, on an uncompensated, at will basis.	1/2023

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
3	Kennedy & Madonna, LLP	Hurley, New York	Pursuant to my partnership agreement, I received my final partnership payout in May 2024. I will not receive any further payment from this entity. The firm has agreed to cease to transact business utilizing the legal name, Kennedy & Madonna, LLP	12/2000
4	Kennedy & Madonna, LLP	Hurley, New York	If confirmed, I will transfer to Kennedy & Madonna all cases in which I have a contingency fee interest, for no compensation. I will forfeit any interest in all contingency fee cases.	5/2023
5	Keppler Associates Inc	Arlington, Virginia	Agreement has ended; there are no future speaking engagements planned and no payments due.	5/1993
6	Morgan & Morgan, PA	Orlando, Florida	I do not currently have any outstanding contingent fee cases and have received all outstanding payments owed me for representation in all previous matters.	3/2023
7	Skyhorse Publishing Inc	New York, New York	Consulting agreement regarding seeking and advising on books to be published. Upon confirmation, I will terminate this agreement.	8/2022
8	WisnerBaum f/k/a Baum Hedlund Aristei & Goldman	Los Angeles, California	Upon confirmation, I will retain an interest in contingency fee cases that do not involve claims against the United States and in which the United States is not a party and does not have a direct and substantial interest. I will divest of my interest in contingency fee cases that involve claims against the United States or in which the United States is a party or has a direct and substantial interest.	9/2016
9	National Resources Defense Council Inc	Austin, Texas	I will continue to receive distributions from a defined benefit plan sponsored by this employer.	1/2015
10	Skyhorse Publishing Inc	New York, New York	Agreement for three new books. Two have been completed prior to entering government service and one has not been completed. I will not engage in writing, editing, marketing or promotional services for any of these books during government service.	8/2024
11	Abtech Industries	Scottsdale, Arizona	Amount owed for services rendered between Q2 2011 and Q1 2017	4/2011



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

#	SOURCE NAME	CITY, STATE	BRIEF DESCRIPTION OF DUTIES	
1	Children's Health Defense f/k/a World Mercury Project	Franklin Lakes, New Jersey	Services as Chairman of the Board & Chief Legal Counsel, general advisory duties only.	
2	J W Howard Attorneys	Los Angeles, California	General Advisory Duties	
3	Kennedy & Madonna, LLP- Law Firm	Hurley, New York	Provided legal representation to clients	
4	Hillsdale College	Hillsdale, Michigan	Speech March 5, 2023-arranged by Keppler.	
5	Morgan & Morgan, P.A. - Law Firm	Orlando, Florida	Of Counsel agreement, general advisory duties	
6	Skyhorse Publishing Inc - Publisher	New York, New York	General Consulting and author.	
7	Trending 911 Inc.	Gainesville, Florida	Endorsement Agent for Boxbollen.	
8	Over the Horizon Action -Rockbridge Fall Summit	Las Vegas, Nevada	Speech 11/7/2024	
9	Trending 911 Inc. -Genius Network	Scottsdale, Arizona	Speech 11/9/2024	
10	WisnerBaum f/k/a Baum Hedlund Aristei & Goldman	Los Angeles, California	Provided legal representation and referrals.	
11	Marwood Group LLC	New York, New York	Consultant - General Advisory Duties	
12	Clients of WisnerBaum	See Endnote	various	Referral Fees for Contingency Claims.
13	Confidential clients not disclosed pursuant to NY and California Bar Rule 1.6 = 53 individual minors.	See Endnote		Legal Services

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

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Youngster Productions Inc (Media production)	N/A	\$500,001 - \$1,000,000	salary	
1.1	Cast & Crew LLC - Film/TV Payroll	No			
1.1.1	"Curb Your Enthusiasm", Curb Your Enthusiasm Inc	N/A		salary	
1.1.2	"A Bad Moms Christmas", STX Financing, LLC	N/A		Residuals	
1.2	Disney Worldwide Services Inc - Film/TV Production	No			
1.2.1	"Son of Zorn", Twentieth Century Fox Film Corporation	N/A		Residuals	
1.2.2	"Waitress", Twentieth Century Fox Film Corporation	N/A		Residuals	
1.2.3	"Herbie:Fully Loaded", Walt Disney Pictures	N/A		Residuals	
1.3	GEP Talent Services, LLC	No			
1.3.1	"Fantasy Island", SPE Inc on behalf of CPT Holdings, Inc (undefined)	N/A		Residuals	
1.3.2	"RV", SPE Inc on behalf of CPT Holdings, Inc	N/A		Residuals	
1.3.3	"The Ugly Truth", SPE Inc on behalf of CPT Holdings, Inc	N/A		Residuals	
1.3.4	"I Can See Your Voice", Fox Square Productions	N/A		Residuals	
1.3.5	"Space Chimps", Lionsgate/Starz Media LLC	N/A		Residuals	

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1.3.6	"The Conners", The Carsey-Werner Company LLC	N/A		Residuals	
1.4	Media Services Processing LLC	No			
1.4.1	"Curb Your Enthusiasm (acting)", Home Box Office	N/A		Residuals	
1.4.2	"Curb Your Enthusiasm (directing)", Home Box Office	N/A		Residuals	
1.4.3	"Fear and Loathing in Aspen (acting)", ABS Payroll	N/A		salary	
1.5	NBC Universal	No			
1.5.1	"TrollHunters", Universal City Studios LLC	N/A		Residuals	
1.6	"True Story Podcast", Headgum Inc.	N/A		Advertising Revenue	
1.7	"Suburgatory", Warner Bros. Television, a division of WB Studios Enterprises Inc	N/A		Residuals	
1.8	"The Flight Attendant", Warner Bros. Television, a division of WB Studios Enterprises Inc	N/A		Residuals	
1.9	"About Fate" - MGM & UA Services Company	N/A		Residuals	
1.10	Skyhorse Publishing, Inc, book "My Shade of Crazy:A Memoir"	N/A		Book Advance	\$600,000
2	SEP-IRA#1	No			
2.1	Fidelity Government Cash Reserves	Yes	\$1,001 - \$15,000		None (or less than \$201)
2.2	DFA Intl Real Estate Sec Portfolio (DFITX)	Yes	\$15,001 - \$50,000		None (or less than \$201)
2.3	DFA Investment Grade Portfolio Instl (DFAPX)	Yes	None (or less than \$1,001)		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.4	DFA Five Year Gbl Fixed Inc Prtf Instl (DFGBX)	Yes	None (or less than \$1,001)		None (or less than \$201)
2.5	Vanguard Short Term Infltn Prot Sec Admr (VTAPX)	Yes	None (or less than \$1,001)		None (or less than \$201)
2.6	Vanguard GNMA Admiral (VFIJX)	Yes	None (or less than \$1,001)		None (or less than \$201)
2.7	American Centy ETF TR Avantis US Small Cap Value (AVUV)	Yes	\$50,001 - \$100,000		None (or less than \$201)
2.8	American Centy ETF TR Avantis US EQT (AVUS)	Yes	\$250,001 - \$500,000		None (or less than \$201)
2.9	Dimensional ETF Trust Emerging Markets Core Equity 2 ETF (DFEM)	Yes	\$100,001 - \$250,000		None (or less than \$201)
2.10	Dimensional ETF Trust International High Profitability ETF (DIHP)	Yes	\$15,001 - \$50,000		None (or less than \$201)
2.11	Dimensional ETF Trust International Small Cap Value ETF (DISV)	Yes	\$15,001 - \$50,000		None (or less than \$201)
2.12	Dimensional ETF Trust International Core Equity 2 ETF (DFIC)	Yes	\$100,001 - \$250,000		None (or less than \$201)
2.13	Dimensional ETF Trust Dimensional US Real estate ETF (DFAR)	Yes	\$15,001 - \$50,000		None (or less than \$201)
2.14	Dimensional ETF Trust Dimensional US High Profitability ETF (DUHP)	Yes	\$50,001 - \$100,000		None (or less than \$201)
2.15	Dimensional ETF Trust Global Ex US Cor (DFGX)	Yes	\$50,001 - \$100,000		None (or less than \$201)
2.16	Dimensional ETF Trust Short duration F (DFSD)	Yes	\$100,001 - \$250,000		None (or less than \$201)
2.17	Dimensional ETF Trust Core Fixed Incom (DFCF)	Yes	\$100,001 - \$250,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.18	Vanguard Sht-Term Inflation-Protected Sec IDX (VTIP)	Yes	\$100,001 - \$250,000		None (or less than \$201)
3	IRA #1	No			
3.1	Fidelity Government Cash Reserves	Yes	None (or less than \$1,001)		None (or less than \$201)
3.2	American Centy ETF TR Avantis US Small Cap Value (AVUV)	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.3	American Centy ETF TR Avantis US EQT (AVUS)	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.4	Dimensional ETF Trust Emerging Markets Core Equity 2 ETF (DFEM)	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.5	Dimensional ETF Trust International High Profitability ETF (DIHP)	Yes	None (or less than \$1,001)		None (or less than \$201)
3.6	Dimensional ETF Trust International Small Cap Value ETF (DISV)	Yes	None (or less than \$1,001)		None (or less than \$201)
3.7	Dimensional ETF Trust International Core Equity 2 ETF (DFIC)	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.8	Dimensional ETF Trust Dimensional US Real estate ETF (DFAR)	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.9	Dimensional ETF Trust Dimensional US High Profitability ETF (DUHP)	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.10	Vanguard Bd Index Fds Total Bnd Mrkt (BND)	Yes	None (or less than \$1,001)		None (or less than \$201)
3.11	Vanguard Sht-Term Inflation-Protected Sec IDX (VTIP)	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.12	Vanguard Charlotte Fds Total Intl Bd ETF (BNDX)	Yes	None (or less than \$1,001)		None (or less than \$201)
3.13	VANGUARD SCOTTSDALE FOS MTG.BKD SECS ETF (VMBS)	Yes	None (or less than \$1,001)		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3.14	Dimensional ETF Trust Global Ex US Cor (DFGX)	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.15	Dimensional ETF Trust Short duration F (DFSD)	Yes	\$1,001 - \$15,000		None (or less than \$201)
3.16	Dimensional ETF Trust Core Fixed Incom (DFCF)	Yes	\$1,001 - \$15,000		None (or less than \$201)
4	Pension #1 - Director's Guild of America Producers Pension Fund, defined benefit plan	N/A	\$1,001 - \$15,000		None (or less than \$201)
5	Pension #2 - SAG Producers Pension Fund, defined benefit plan	N/A	\$250,001 - \$500,000		None (or less than \$201)
6	Pension #3 - SAG/AFTRA Retirement Fund - (entitled to receive \$5,500/month at age 65), defined benefit plan (value not readily ascertainable)	N/A			None (or less than \$201)
7	Hines & Young, LLC - Beauty Products - operations commenced May 2023	N/A	None (or less than \$1,001)	Business Income	\$50,000
7.1	Hines & Young, LLC - Trademark - value not readily ascertainable	N/A			None (or less than \$201)
8	"Friends", Warner Bros Television, a division of WB Studios Enterprises, Inc	N/A		Residuals	
9	Media Services Processing LLC	No			
9.1	"Curb Your Enthusiasm", (acting), Home Box Office	N/A		Residuals	

## 6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Dragonfly Therapeutics, Inc - Immunotherapy Research and Development	N/A	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500
2	US Bank Acct #1 (cash)	N/A	\$250,001 - \$500,000	Interest	\$201 - \$1,000
3	US Bank Acct #2 (cash)	N/A	\$1,001 - \$15,000		None (or less than \$201)
4	US Bank Acct #3 (cash)	N/A	None (or less than \$1,001)		None (or less than \$201)
5	Family Trust #1	No			
5.1	Citibank Money Market Account (cash)	N/A	\$1,001 - \$15,000		None (or less than \$201)
5.2	Brokerage #1	No			
5.2.1	Northern Funds US Govt Money Mkt Fd (NOGXX)	Yes	\$1,001 - \$15,000		\$5,001 - \$15,000
5.3	Park Holdings Group, LLC - Equity Investments (underlying assets below threshold are not reported)	No			
5.3.1	Northern Funds US Govt Money Mkt Fd (NOGXX)	Yes	None (or less than \$1,001)		None (or less than \$201)
5.3.2	Generation IM Global Equity Fund (underlying assets below threshold)	No	\$1,001 - \$15,000		None (or less than \$201)
5.3.3	Lone Cascade- Class K	Yes	\$1,001 - \$15,000		None (or less than \$201)
5.4	Park Holdings Group, LLC - Hedge Investments (underlying assets below reporting threshold are not reported)	No			
5.4.1	Northern Funds US Govt Money Mkt Fd (NOGXX)	Yes	None (or less than \$1,001)		None (or less than \$201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.5	Park Holdings Group, LLC - Fixed Income Investments (underlying assets below threshold)		No			
5.5.1	Northern Funds US Govt Money Mkt Fd (NOGXX)		Yes	None (or less than \$1,001)		None (or less than \$201)
5.6	Park Holdings Group, LLC - Private Equity Investments		No			
5.6.1	Deutsche Banc Special Opps Fund (Underlying assets are not disclosed due to a preexisting confidentiality agreement)	See Endnote	No	\$1,001 - \$15,000		None (or less than \$201)
5.6.2	Rockefeller Access Fund I, LLC (Underlying assets are not disclosed due to a preexisting confidentiality agreement)	See Endnote	No	\$1,001 - \$15,000		None (or less than \$201)
5.6.3	Northern Funds US Govt Money Mkt Fd (NOGXX)		Yes	\$1,001 - \$15,000		None (or less than \$201)
5.7	GridBright Inc - technology company specializing in secure and sustainable grid integration.		N/A	\$1,001 - \$15,000	Capital Gains	\$100,001 - \$1,000,000
5.8	Vantagepoint Cleantech Associates, II LP - Investment Partnership (underlying investments below threshold are not reported)		No	\$15,001 - \$50,000		None (or less than \$201)
5.8.1	Amprius, Inc - High Energy Battery Research and Development		No			
5.8.1.1	Amprius Technologies, Inc. (AMPX)		N/A	\$1,001 - \$15,000		None (or less than \$201)
5.9	Wolf Point Owners LLC (real estate development holding company)		No			
5.9.1	Commercial Real Estate, parcel 1, Chicago Illinois		N/A	None (or less than \$1,001)		None (or less than \$201)
5.9.2	Commercial Real Estate, parcel 2, Chicago Illinois		N/A	\$500,001 - \$1,000,000		None (or less than \$201)



#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.9.3	Commercial Real Estate, parcel 3, Chicago Illinois		N/A	\$100,001 - \$250,000	Distribution of net operating income	\$9,482
5.9.4	Commercial Real Estate, parcel 4, Chicago Illinois		N/A	\$100,001 - \$250,000	Distribution of net operating income	\$1,284
5.10	Park Holdings Group, LLC - Realty Investments		No			
5.10.1	Northern Funds US Govt Money Mkt Fd (NOGXX)		Yes	\$1,001 - \$15,000		\$201 - \$1,000
5.11	Arctic Royalty LP - private land - oil & gas rights - OK, TX, KS, LA, MS, AL, FL	See Endnote	N/A	None (or less than \$1,001)	Capital Gains and operating income	\$26,605
6	Family Trust # 2		No			
6.1	Citibank Money Market Account (cash)		N/A	None (or less than \$1,001)		None (or less than \$201)
6.2	Arctic Royalty LP - private land - oil & gas rights - OK, TX, KS, LA, MS, AL, FL	See Endnote	N/A	None (or less than \$1,001)	Capital Gains and operating income	\$28,532
7	Family Trust #3		No			
7.1	Citibank Money Market (cash)		N/A	None (or less than \$1,001)		None (or less than \$201)
7.2	Park Holdings Group, LLC - Equity Investments		No			
7.2.1	Generation IM Global Equity Fund (underlying assets below threshold)		No	\$15,001 - \$50,000		None (or less than \$201)
7.2.2	Dodge and Cox Global Stock Fund (DODWX)		Yes	\$1,001 - \$15,000		\$201 - \$1,000
7.2.3	Amansa Fund, L.P. (Underlying assets are not disclosed due to a preexisting confidentiality agreement)	See Endnote	No	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.2.4	WGI Emerging Markets Fund, LLC (Underlying assets are not disclosed due to a preexisting confidentiality agreement)	See Endnote	No	\$1,001 - \$15,000		None (or less than \$201)
7.2.5	McDonald Capital Investors, Inc (underlying assets below the reporting threshold not disclosed)		No	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
7.2.5.1	Progressive Corp (NYSE - PGR)		N/A	\$1,001 - \$15,000		None (or less than \$201)
7.2.5.2	Northern Funds US Govt Money Mkt Fd (NOGXX)		Yes	None (or less than \$1,001)		None (or less than \$201)
7.2.6	Lone Cascade- Class K		Yes	\$1,001 - \$15,000		None (or less than \$201)
7.2.7	Lone Cascade- Class J		Yes	\$1,001 - \$15,000		None (or less than \$201)
7.2.8	Velt Partners Fund, LLC		Yes	\$1,001 - \$15,000		None (or less than \$201)
7.2.9	HCP Private Equity Fund VII, LP (Underlying assets are not disclosed due to a preexisting confidentiality agreement)	See Endnote	No	\$1,001 - \$15,000		None (or less than \$201)
7.2.10	HCP Private Equity Fund VIII, LLC (Underlying assets are not disclosed due to a preexisting confidentiality agreement)	See Endnote	No	\$1,001 - \$15,000		None (or less than \$201)
7.2.11	HCP China Capital Appreciation (Underlying assets are not disclosed due to a preexisting confidentiality agreement)	See Endnote	No	\$1,001 - \$15,000		None (or less than \$201)
7.2.12	HCP Private Equity Fund IX, LP (Underlying assets are not disclosed due to a preexisting confidentiality agreement)	See Endnote	No	\$1,001 - \$15,000		None (or less than \$201)
7.2.13	HCP Private Equity Fund X, LP (Underlying assets are not disclosed due to a preexisting confidentiality agreement)	See Endnote	No	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
7.2.14	Vanguard Intl Equity Index Fund (VTIAX)		Yes	None (or less than \$1,001)		\$201 - \$1,000
7.2.15	Northern Funds US Govt Money Mkt Fd (NOGXX)		Yes	None (or less than \$1,001)		None (or less than \$201)
7.2.16	Baker Brothers Life Sciences, LP (Underlying assets below threshold)		No	\$1,001 - \$15,000		None (or less than \$201)
7.2.17	GMO Resources Fund (GOFIX)		Yes	\$1,001 - \$15,000		None (or less than \$201)
7.2.18	Hound Partners Variable Beta Fund LP (Underlying assets below threshold)		No	\$1,001 - \$15,000		None (or less than \$201)
7.2.19	Ichigo Japan Fund G LP (Underlying assets below threshold)		No	\$1,001 - \$15,000		None (or less than \$201)
7.3	Park Financial Holdings - Hedge Fund (Underlying assets below threshold are not reported)		No			
7.3.1	Northern Funds US Govt Money Mkt Fd (NOGXX)		Yes	\$1,001 - \$15,000		None (or less than \$201)
7.4	Park Holdings Group, LLC - Fixed Income Investments (underlying assets below threshold)		No			
7.4.1	Northern Funds US Govt Money Mkt Fd (NOGXX)		Yes	None (or less than \$1,001)		\$201 - \$1,000
7.5	Arctic Royalty LP - private land - oil & gas rights - OK, TX, KS, LA, MS, AL, FL	See Endnote	N/A	\$1,001 - \$15,000	Operating income	\$467
8	Family Trust #4 - Underlying assets are non-reportable personal property that is not for investment or production of income		No			
9	Family Trust #5 - Underlying assets are non-reportable personal property that is not for investment or production of income		No			

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
10	US Bank Acct #4 (cash)	N/A	\$1,001 - \$15,000		None (or less than \$201)
11	US Bank Acct #5 (cash)	N/A	\$1,001 - \$15,000		None (or less than \$201)
12	US Bank Acct #6 (cash)	N/A	\$100,001 - \$250,000	Interest	\$15,001 - \$50,000
13	Brokerage #2	No			
13.1	Bitcoin (BTC) (Fidelity Crypto)	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
13.2	Fidelity U.S. Brokerage Account (cash)	N/A	\$50,001 - \$100,000		None (or less than \$201)
14	Family Trust #7 - no assets added as yet	No	None (or less than \$1,001)		None (or less than \$201)
15	Northern Funds US Govt Money Mkt Fd (NOGXX)	Yes	\$1,000,001 - \$5,000,000		\$100,001 - \$1,000,000
16	Marathon Digital Holdings Inc (MARA)	N/A	None (or less than \$1,001)		None (or less than \$201)
17	Brokerage #3 - Dependent	No			
17.1	Apple (AAPL)	N/A	\$1,001 - \$15,000		None (or less than \$201)
17.2	Amazon (AMZN)	N/A	\$15,001 - \$50,000		None (or less than \$201)
17.3	CRISPR Therapeutics AG	N/A	\$1,001 - \$15,000		None (or less than \$201)
17.4	SPDR S&P 500 ETF (SPY)	Yes	\$50,001 - \$100,000		\$201 - \$1,000
17.5	Zscaler (ZS)	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
18	Jeff Hayes, Licensing Agreement to use MAHA brand marks	See Endnote	N/A	None (or less than \$1,001)	licensing fees	\$100,000

## 7. Transactions

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

## 8. Liabilities

#	CREDITOR NAME	TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
1	City National Bank - Spouse as Guarantor - Hines & Young LLC	Exercised Line of Credit	\$250,001 - \$500,000	2020	prime + 4.25%	6 years
2	City National Bank - paid in full 5/24/2023	Term Note	\$250,001 - \$500,000	2022	prime + 2.25%	3 years
3	American Express	Credit Card	\$50,001 - \$100,000	2023	23.49%	revolving
4	American Express	Credit Card	\$500,001 - \$1,000,000	2023	23.49%	Revolving
5	American Express	Credit Card	\$50,001 - \$100,000	2023	23.24%	Revolving
6	American Express	Credit Card	\$10,001 - \$15,000	2023	23.24%	Revolving
7	US Bank	Mortgage on Personal Residence	\$1,000,001 - \$5,000,000	2022	2.375%	30 yr, 10/1 ARM interest only
8	City National Bank	Mortgage on Personal Residence	\$1,000,001 - \$5,000,000	2021	2.28%	30 YR, 10/1 ARM Interest Only

#	CREDITOR NAME	TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
9	City National Bank	Mortgage on Personal Residence	\$250,001 - \$500,000	2018	3.62%	30 years

## 9. Gifts and Travel Reimbursements

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

## Endnotes

PART	#	ENDNOTE
2.	3.1	Upon confirmation, I will relinquish all interests in these contingency fee cases
2.	3.2	Upon confirmation, I will relinquish all interests in these contingency fee cases
2.	25	This endorsement agreement related to endorsements of Boxbollen products via social media content. Following signature of the report, I returned \$50,000 as I was not able to fully perform obligations under the contract.
2.	30	\$90,000 owed for services provided.
2.	31	Advance will be between 1-2 million dollars - not received yet.
2.	32	Advance will be between 1-2 million dollars - not received yet.
2.	33	Agreement is for \$10,000.00 dollars which has not been received.

PART	#	ENDNOTE
4.	12	7037 Birdview Avenue, LLC ; Albo, Gerard; Alexander, Brandy E.; Alexander, Steve; Alexander, Vanessa; Alsobrook, James A.; Altagen, Robert S.; Anderson, Kristin; Anderson, Michael; Andrew Sprague Construction; Andrews-Tang, Denise M.; APD Clean Water Technologies; Arnold, Kara; Arnold, Randy; Aspron, Alexandra; Astrup, David; Azarian, Valerie; Bagorio, Majesti Mai; Bagorio, Margaritia Mai; Bagorio, Mauricia Mai; Bagorio, Monica; Ballantyne, Denise T.; Ballantyne, Thomas W.; Balsiger, Jane A.; Balsiger, Justine G.; Barish Trust; Barish, Colter; Barish, Geoffrey; Barish, Sadie P.; Barker, Michelle D.; Barnard, Aiden B.; Barnard, David A.; Barnard, Hunter G.; Barnard, Melissa R.; Barnard, Tristan M.; Bates, Sarah J.; Baum, Colleen M.; Baum, Michael L.; Bech, Lotus; Bensel, Connie; Bird, Devon; Bird, Douglas B.; Bird, Kathy A.; Bitchin' Diggs, LLC; Bivens, Damon;

Bivens, Damon;  
Blue Clementine Trust;  
Boland, Elizabeth;  
Boland, James;  
Boland, Michael;  
Boland, Norine;  
Boland, Vanessa;  
Bomar, Duane;  
Bomar, Nina;  
Booker, Susan B.;  
Bren, Cynthia;  
Bren, Dashiell;  
Bressler, Nathan;  
Brown, Keith;  
Brown, Kevin D.;  
Brownfield, Faye E.;  
Brunner, Jesse;  
Burton, Paul R.;  
Busch, Yvonne;  
Bustamante, Diego;  
Bustamante, Rudy N.;  
Butler, Michael;  
Cairns Family Revocable Trust;  
Cairns, John M.;  
Cameron, Denise M.;  
Campbell-Hill, Nancy A.;  
Cannon, Nancy G.;  
Capers, John D., Jr.;  
Capers, Nora;  
Carrese, Lori A.;  
Carrick, Lois M.;  
Carrick, Michael B.;  
Carson, Bjorn;  
Carson, Carrie Ann;  
Casey Family Trust;  
Casey, Carol;  
Casey, Tony P.;  
Castellano, Oscar I.;  
Chambers, Thomas W.;  
Chollet, Geraldine;  
Christian, Kathryn V.;  
Colby, Linda;  
Colby, Trevor;  
Cole Ohana Revocable Trust;  
Cole, Dale P.;

---



Cole, Dale P.;  
Cole, Kari;  
Conley, Jerry;  
Connors, Connie;  
Cooperman, Michael J.;  
Cordelia and Todd Tappin Family Trust;  
Cordelia and Todd Tappin Family Trust;  
Corey, Michelle M.;  
Cornejo, Mirelia;  
Cortazzo Ranch LLC;  
Cortazzo, Chris;  
Cossette, Rita;  
Costa, Andrew J.;  
Costa, Lynn M.;  
Costa, Shannon E.;  
Culley, Denise;  
Culley, Emmett;  
Cunningham, Alli;  
Cunningham, Kim;  
Cunningham, Maci;  
Cunningham, Michael J.;  
D'Ignazio, Patrick;  
D'Lugoff, Rachel;  
Dandel Trust;  
Danley, Gage D.;  
Danley, Greg;  
Danley, Linda;  
Dante, Joseph;  
Darrin, Daniel P.;  
Darsa, Karol;  
David Yates and Gena Yates Revocable Trust;  
Davis, Timothy J.;  
Dayani, Rosagalia;  
Dechter, Lorraine;  
deCiutiis, Alfred C.;  
Deen, Janet L.;  
DeLaney, Colleen;  
Denise Marie Andrews-Tang Family Trust;  
Dibaei Family Trust;  
Dibaei, Mohsen;  
Dibaei, Salameh;  
Dibaei, Sara;  
Dijker, Barbara;  
Dijker, Brian R.;  
Dijker, Charlie;

---

Dijker, Charlie;  
Dimitri Trust;  
Dobra, Susan M.;  
Doherty, Shannen;  
Dossett Family Trust;  
Dossett, Ben;  
Dossett, Susan;  
Dossetti, Emmanuel;  
Downing, Michael A.;  
Downing, Sabrina B.;  
Dr. Daily, Micah S.;  
Duthie, Scott;  
Dyne, Charlotte;  
Dyne, Chloe;  
Dyne, Colin;  
Dyne, Shari;  
Eigler, Jaye;  
Eigler, Neal L.;  
Ellis Family Trust;  
Ellis, David;  
Ellis, Patricia;  
Elster, Stuart;  
Faherty, Mary;  
Faherty, Paul;  
Fanning, Craig M.;  
Fantini Family Trust;  
Fantini, Marc;  
Fasola, Kenneth B.;  
Ferket, Paulette L.;  
Ferreira Construction, Inc.;  
Ferreira, Steve;  
Flanigan, Joseph;  
Flores, Lisa A.;  
Flying Fish Films, LLC;  
Fogel, Jamee R.;  
Garcia, Jerry Allen;  
Garcia, Sharon Yvonne;  
Gardner, Paula;  
Garfinkle, Craig Stuart;  
Garfinkle, Craig Stuart;  
Gary and Rebecca Gottowski Living Trust;  
Ghirardelli, Jill H.;  
Gibbs, Keegan Thomas;  
Gibbs, Linda M.;  
Gibbs, Richard;

---

Gibbs, Richard;  
Gilbertson, Regan Danthony;  
GIMA Restaurant, Inc.;  
Goldstein Cooperman, Candice L.;  
Goldstein, Rafael;  
Gonzalez, Adriana;  
Gordon, Lisa;  
Gottowski, Gary R. ;  
Gottowski, Rebecca A.;  
Griffin, Susanne;  
Groomer, Catherine;  
Gueye, Serigne Saliou B. S.;  
Guillemot, Cyrille;  
Guillemot, Dexter;  
Guillemot, Dominick;  
Guillemot, Judith;  
Gunn, Linda Susan;  
Haber, Jeanne P.;  
Haber, Thomas S.;  
Hahn, Daniel;  
Hale & Associates, LLC;  
Hale, Nicholas;  
Hale, Terry J.;  
Halverson, Bobette;  
Hame, Heidi;  
Hansen, Meghan A.;  
Harris, Gabrielle K.;  
Hashman, Ray;  
Hauptman, George;  
Hauptman, George J.;  
Hauptman, Margaret;  
Haynes, Shari L.;  
Haynes, Tony G.;  
Heidegger, Jami M.;  
Heidegger, Klaus;  
Hendrie, Alyssa B.;  
Hendrie, Tessa M.;  
Heritage Real Estate Group International, Inc.;  
HH Family Trust;  
Hicks, Laura;  
Hill, Mark A.;  
Holland, John R.;  
Holmes Defender of Faith, LLC;  
Horn Family Trust;  
Horn, Ellen;

---

Horn, Ellen;  
Horn, Larry;  
Ibrahim, Amir A.;  
Ingoglia, Arlene;  
Ingoglia, Joseph A.;  
Izambard, Renee;  
Izambard, Sebastien;  
Izquierdo, Jairo;  
Jacobson, Richard Leslie;  
James Joseph Webster Trust;  
Jeffers, Gigi A.;  
Jensen, Wendy;  
Jimenez, Socorro;  
Johnson, Lisa;  
Johnson, Shawna;  
Jolley, Joan D.;  
Jones, Norman A.;  
Joseph, Daniel Robert;  
Kasza, Elisabeth;  
Kasza, Elizabeth J.;  
Kennon, Joshua;  
Kern, Rebecca;  
Kern, Sarah;  
Keystone Group, Inc;  
KG Malibu, LLC dba SIP Malibu Grapes;  
King, Martin G.;  
Klatte Family Trust;  
Klatte, Carroll L.;  
Klatte, Herman K.;  
Klein, Larry;  
Kloppman, Kai;  
Koenig, David A.;  
Kohn, Michael B.;  
Kotler Family Irrevocable Family Trust;  
Kotler, Ava J.;  
Kotler, Honore;  
Kotler, Kirra R.;  
Krause, Adam D.;  
Kunst Family Trust;  
Kunst Painting and Decorating;  
Kunst, John Thomas;  
Ladesich, Lucas A.;  
Ladesich, Nicholas J.;  
Ladesich, Robert M.;  
Lamonea, Gaige;

---

Lamonea, Gaige;  
Lamonea, Hannah;  
LaPlante, Jacqueline;  
LaPlante, Juliette;  
LaPlante, Leo R.;  
LaPlante, Rosamond L. A.;  
Lasky, Matthew P.;  
Lasky, Thea;  
Laveque, Jamison;  
Lawhun, Alec;  
Lawhun, Jolene M.;  
Lawhun, Lucille;  
Lawhun, Mateo;  
Lawhun, Nicole Marie;  
Lawhun, Steven Allen;  
Lawhun, Troyanna;  
Lazzarino, Mark L.;  
Lazzarino, Stacy L.;  
Ledoux, Kimberly E.;  
Lefevre, Gregory;  
Lefevre, Michelle;  
LeGassicl, Jenefer P.;  
LeGassicl, Steven;  
Lejade, Dominique;  
Lemos, Dhara;  
Leon Elster, Inc.;  
Levy, Leann M.;  
Lewis, Kelly M.;  
Liles, Alexis;  
Lindstrom, Kevin;  
Lindstrom, Sandra;  
Lloy, Karin Ruth;  
Loomis, Elizabeth;  
Lovaas, Lisa;  
Love & Varlinsky Trust;  
Love, Marianna R.;  
Loy-Hicks, Lucille;  
Loy, John;  
LRW Living Trust;  
Luce, David W.;  
Luce, Edward S.;  
Luce, Jeri A.;  
Lupo, Cosett;  
Lupo, Evelyn;  
Lupo, Francheska;

---

PART

#

ENDNOTE

---

Lupo, Francheska;  
Lupo, John M.;  
Lyon, Georgie L.;  
Mack, Koa;  
Mack, Kristin;  
Mack, Nalu;  
Madruga, Maria;  
Madruga, Noah;  
Magalia Community Church;  
Major, Paul;  
Major, Valerie;  
Makkink, Yvonne;  
Malibu Eventing, LLC;  
Malibu Shirts Inc.;  
Malmazada, Debra J.;  
Malmazada, Gabrielle T.;  
Malmoux, Ludovic;  
Malmoux, Tamatha;  
Mancini, Patricia A.;  
Marinero Family Trust;  
Marinero, Katharine L.;  
Marinero, Luca;  
Marinero, Nico;  
Marinero, Ron;  
Martinez, Araceli;  
Martinez, Victor;  
Marx, Nicole J.;  
Masset, Eloise R.;  
Masset, Marybeth;  
Masset, Patrick & Marybeth;  
Masset, Patrick J.;  
Masset, Rose;  
Masset, Weston H.;  
Matson, Kelly L.;  
McGee, Daniel;  
McGee, Inez;  
McGee, James;  
McGee, Karin;  
McKinnon Family Trust;  
McKinnon, Mark A.;  
McKinnon, Wendy M.;  
Mendoza, Christina;  
Mezenova, Marina;  
Michael Stuart Weinstock Trust;  
Miller-George, John L.;

---

Miller-George, John L.;  
Miller-George, Sandra S.;  
Mills, Tiffany;  
Miracle, Tai;  
Moore, Dennis;  
Moore, Luca;  
Moore, Sally;  
Moore, Sorin;  
Morch, Andreas M.;  
Morch, Joanne M.;  
Morelock, Norma;  
Morelock, Robert;  
Morgan, Michael;  
Moseley, Madison M.;  
Moulard, Cecile;  
Murphy, Bonnie M.;  
Murphy, Edward F.;  
Murphy, Edward S.;  
Murphy, Molly;  
Murrell, Chase;  
Murrell, Hunter;  
Murrell, Inga;  
Murrell, Jeff;  
Myers, James J.;  
Myers, Jean M.;  
Nancy Campbell-Hill and Mark Hill Trust;  
Natalia, Anthony J.;  
Natalia, Anthony J. R.;  
Natalia, Kathryn I.;  
Natalia, Nicole;  
Nathanson, Naomi J.;  
Nestor, Peggy;  
Niebergall, David;  
Noone, Eimear;  
Norman, David C.;  
Norman, David C.;  
Norman, Edward D.;  
Norman, Rita A.;  
O'Grady, Shannon S.;  
O'Grady, Tammi J.;  
O'Hara, Christina;  
O'Hara, Erin M.;  
O'Neal, Brendon;  
O'Neill Ferris, Barbara;  
O'Neill, Blaine;

---

O'Neill, Blaine;  
O'Neill, Elizabeth;  
O'Neill, Riley;  
O'Neill, Steven;  
O'Hara, Erin M.;  
Olsen-Fanning, Ita;  
Olson, Randy;  
Omary, Michael R.;  
Omary, Michael R.;  
Ovando, Rene G.;  
Oxenberg, Catherine;  
Oxenberg, India R.;  
Pacific Malibu, LLC;  
Page, Aja;  
Page, Alicia F.;  
Page, James;  
Page, Linda;  
Page, Richard;  
Palmer, Jonathan R.;  
Palms of Malibu Ranch, LLC;  
Paradise Community Guilds;  
Park, Jerry L.;  
Parker, Rosalie C.;  
Pascucci, Patricia;  
Patterson, Hamish K.;  
Pendergast, Cherry;  
Pendergast, Logan;  
Pendergast, W. M.;  
Petersen, Jennifer;  
Petersen, Michael;  
Petersen, Porter;  
Peterson, Glen D.;  
Peterson, Jacqueline M.;  
Phelps-Zink, David L.;  
Phelps-Zink, Lori;  
Poe, Kim;  
Poe, Rahasya;  
Possick, Benjamin;  
Potters, Risa;  
Puklus, Jane M.;  
Quattlander, Karen;  
Quigley, Michael W.;  
Quinones-Gallegos, Yahna;  
Quintero Carrillo, Victor;  
Reconnect Psychological Services;

---



Reconnect Psychological Services;  
Redclay, Brianna;  
Redclay, Elijah;  
Redclay, Rivers;  
Redridge-Kunst, Vicki L.;  
Renn, Carol Louise;  
Reyes, Juan;  
Rezvan, Abbas;  
Rezvan, Ali;  
Rezvan, Farahnaz;  
Rezvan, Ghazzal;  
Richards, Christos;  
Richardson, Alison A.;  
Richardson, Gary A.;  
Rifkin, Blythe;  
Rizzo-Vigo, Karissa;  
Robinson, Matt;  
Roderick, Diane G.;  
Rodgerson, Christine E.;  
Rodgerson, Denis O.;  
Rollins, Nick E.;  
Rondell, Lynn;  
Ropella, Guy D.;  
Rose, James M.;  
Rudisill, Peter J.;  
Rudisill, Petra;  
Rudisill, Robin;  
Ryan, Robert K.;  
Safran, Alexandra;  
Safran, Thomas;  
Salter, Robin B.;  
Samuel, Peter D.;  
Sanchez Debroy, Sofia I.;  
Sanchez, Cesar;  
Santos, Anthony M.;  
Scher, Emily;  
Schiro, Joseph A.;  
Schmidt, Andrea H.;  
Schulz, Shen O.;  
Schuttenberg, Mark D.;  
Schuttenberg, Tanya;  
Scoales, William A.;  
Seashols, Courtney;  
Sebba, Neil;  
Segreto, Giuseppe;

---

Segreto, Giuseppe;  
Selig, Jonathan S.;  
Sherman, Anne O.;  
Sherman, Fay H.;  
Shevick, Ivy;  
Shevick, Jerry J.;  
Shevick, Truman;  
Shoemaker, Paul;  
Shoemaker, Tina N.;  
Sierka, Karl;  
Sierka, Karly;  
Sitzer, Anni J.;  
Sklarevsky, Valerie;  
Small, Tricia;  
Smelser, Matthew D.;  
Smith, Brett;  
Smith, Konoka L.;  
Smith, Noriko K.;  
Smith, Olivia;  
Smith, Sakura P.;  
Smith, Stuart & Noriko;  
Smith, Stuart A.;  
Snap Investments, Incorporated Projects, Inc. dba Investment Management Corporation, and 4350-68;  
Sonntag, Diane;  
Sonntag, Walter;  
Sottile, Barbara;  
Sprague - Haber, LLC;  
Sprague, Andrew C.;  
Sprague, Janell L.;  
Stack, Brian;  
Stack, Roohi;  
Stansfield, David E.;  
Stansfield, Denise;  
Steele, Glen A.;  
Steven & Nancy R. Faoro;  
Stewart, Chelsey;  
Stewart, Donald W.;  
Stewart, Jessie J.;  
Strange, Wendy L.;  
Streicher, Anthony;  
Streicher, Laura;  
Struthers, John E., III;  
Stultz, James L.;  
Sun, John-Michael;  
Swiger, Jennifer C.;

---

Swiger, Jennifer C.;  
Swiger, John R.;  
Switzer, Paul R.;  
Taheri, Daniel;  
Taheri, Daniel as Trustee of Khaneh Holdings;  
Tahery, Mehry;  
Tahery, Mehry as Trustee of Tahery Family Trust;  
Tang, Jacqueline;  
Tang, Jasmine;  
Tashnek, Gary;  
Taylor, Azita;  
Taylor, Claudia Jo;  
Taylor, Leighton R., III;  
Taylor, Troy;  
The Colby Family Trust;  
The Edward Shell and Jeri Ann Luce Revocable Living Trust;  
The Halverson Family Trust;  
The Kasza Family Trust;  
The Kathryn V. Alires Trust;  
The Loy-Hicks Family Trust;  
The Norton Buffalo - Lisa Flores Trust by Lisa Flores trustee;  
The Toci Trust;  
Thompson, Jeffrey S.;  
Thompson, Nan;  
Thorn, Steven C.;  
Toci, Diana T.;  
Toci, William E.;  
Tonetti, Elena;  
Triunfo Holdings LLC;  
Turner-Crossley, Wesley R.;  
Turner, Charles C.;  
Turner, Meghan I.;  
Turturici, Jack;  
Turturici, Michele;  
V&H Construction;  
V&H Construction;  
Varlinsky, Raymond;  
Vasa Park Association, Inc.;  
Vasquez, George;  
Vigo, Phillip;  
Wachs, Allan S.;  
Walden, Michael;  
Walker, Mary M.;  
Walter & Diane Sonntag Family Trust;  
Ward, Nicholas James;

---

Ward, Nicholas James;  
Watkin, John;  
Watkin, Stefanie;  
Waziri, Omar;  
Webster, Amy L.;  
Webster, James J.;  
Weinstock, Michael S.;  
Weinstock, Sara P.;  
Weisel, Julie A.;  
Weisel, Patricia;  
Westrope, Anthony;  
Westways World Travel, Inc.;  
White, Ethan James;  
White, Mark K.;  
White, Nicole;  
White, Susan B.;  
Wild Rose Films, Inc.;  
Wilkinson, Richard C.;  
Williams, Elinor J.;  
Williams, Robert L.;  
Winterburn, Alexandria R.;  
Winterburn, Anthony B.;  
Winters, Dionne M.;  
Winters, Gregory J.;  
Wise, Wayne William;  
Wolfe, Michelle;  
Wolfe, Valodin;  
Wolman, Laurent R.;  
Wonacott, Victoria A.;  
Woodman, Paul;  
Woodshed Entertainment, President Gibbs, Richard;  
Wyman, Kimberly M.;  
Yang, Zhongmei;  
Yates, David;  
Yuvienco, Zenaida;  
Zatarga, Kathy;  
Zink, Don C. H., II;  
Zuma Canyon Orchids, Inc.;  
Adams, Candace;  
Alderman, Paul E.;  
Ancalade, Kenneth J.;  
Anderson, Donna R.;  
Anderson, Edwin;  
Anderson, Quentin V.;  
Angelo, Bryan;

---

Angelo, Bryan;  
Ash, Thomas E.;  
Auer, Eula A.;  
Baird, Miranda S.;  
Bajeca, Vicki E.;  
Balaz, John;  
Barajas, Rigoberto;  
Barnum-Hutchinson, Lisa;  
Baron, Kelly S.;  
Barrera, Enrique;  
Batten, Jeanne A.;  
Battles, Mary A.;  
Benford, Tommy;  
Beutz, Jennifer L.;  
Blockhus, Curtis M.;  
Bolton, Dana J.;  
Booker, Michael B.;  
Bosak Harkness, William G.;  
Bowns, Allison;  
Brainin, Faina;  
Brenner, Donald E.;  
Broulik, Julie A.;  
Brown, Janet E.;  
Burgon, Ralph D.;  
Cameron, William L.;  
Campbell, Glenn;  
Campbell, John V.;  
Campbell, Rose;  
Carr, Laurence A.;  
Casey, Dempsey R.;  
Chase, Dana L.;  
Chesler, Janet L.;  
Christoffersen, Judy L.;  
Ciabattoni, Patrick J.;  
Clark, Martha J.;  
Clinton, Mary;  
Coker, Scott K.;  
Cole, George R.;  
Cozort, Barbara J.;  
Cressell, Suzanne;  
Crompe, Thomas B.;  
Cruz, Bernadette M.;  
Crysler, Judith A.;  
Davis, Janie M.;  
DeVylder, Karen;

---

DeVylder, Karen;  
Diamond, Susan B.;  
Dutcher, Dawn;  
Dyer, John J.;  
Edwards, Elizabeth K.;  
Ertola, Linda L.;  
Exposito, Alina M.;  
Fabela, Juanita;  
Fink, Samoil;  
Fishman, David W.;  
Fjelstad, Mikki;  
Flores, Stella;  
Forsyth, Maureen L.;  
Forsythe, Beverly A.;  
Freisinger, Sheldon D.;  
Galang, Leonides;  
Galena, Edward C.;  
Getchell, Bruce H.;  
Glassburn, David;  
Goldstein, Jon D.;  
Gunter, William C.;  
Haire, Robert E.;  
Hamilton, Patricia;  
Hansen, Kenny M.;  
Haysom, Richard C., Sr.;  
Hernandez, Phil;  
Hibbs, Nancy E.;  
Hood, Arla C.;  
Huynh, Kim;  
Inspector, Sol;  
Johnson, David D.;  
Johnson, Gerald H.;  
Johnson, Sandy;  
Johnson, Thomas L.;  
Karazournias, Ekaterina;  
Karwoski, Robert P.;  
Kaul, Erik W.;  
Kelly, Robert W.;  
Kenny, Cathleen M.;  
Key, Linda J.;  
Klinke, Ellen L.;  
Koerner, Dorothy J.;  
Kridner, George W.;  
Kritzer, Teresa L.;  
Krugler, Barbara;

---

Krugler, Barbara;  
Lanza, Vicky L.;  
LaRue, Denise C.;  
Lawson, Melissa Ann;  
Laybourne, Vicky;  
Leavitt, Todd A.;  
LeBlanc, Alyson M.;  
Legarreta, Adeline;  
Lent, John R.;  
Levine-Aiton, Elaine;  
Linnabary, Rebecca;  
Liss, Kathleen M.;  
Lotz, Andrea;  
Lunn, Russell S.;  
Mafi, Tracy;  
Malles, Marcia;  
Marinovich, Danielle;  
Marra, Emmett;  
Mason, Faye B.;  
McCleve, Maria L.;  
McIntosh, Susan E.;  
Mendoza, Nancy;  
Merced, Alberto;  
Meyer, Kathleen F.;  
Michels, Timothy;  
Monast, Norman J.;  
Moreno, Tammy B.;  
Morgan, Dolores M.;  
Morton, Harrison;  
Murphy, Grant M.;  
Myers, Joseph R.;  
Nebel, Diane G.;  
Nelson, Patricia A.;  
Nicklin, Michael J.;  
Oakley, Lisa A.;  
O'Connor, Tracie;  
Page, Lucus C.;  
Parisi-Nunya, Cheryl A.;  
Parker, Kenneth C.;  
Parker, Leslie V.;  
Parsons, Julie;  
Patel, Anandkumar T.;  
Peck, Kim A.;  
Perkins, Lillian A.;  
Peters, Silvia and, Bedolla, Maria;

---

Peters, Silvia and, Bedolla, Maria;  
Phagura, Gurbachan K.;  
Playter, Timothy J.;  
Pokusa, Kelly J.;  
Pollina, Ann;  
Pounds, Patricia A.;  
Powell, Tina M.;  
Pratt, Curtiss S.;  
Price, Doreen A.;  
Quattrucci, Lewis T., Jr.;  
Racobs, Mark A.;  
Ramey, Debra K.;  
Ranes, Cheri A.;  
Reid, Yvette;  
Remis, Elyse;  
Renaud, Diane E.;  
Reynolds, Mark A.;  
Rhoads, John L.;  
Rich, Linda K.;  
Ringer, Arthur J.;  
Risner, Irene;  
Robertson, Mona L.;  
Russo, Vito F.;  
Ruvalcaba, Jorge P.;  
Sailes-Jackson, Patricia A.;  
Saltzman, Norma J.;  
Schwien, Stanley R.;  
Seaver, Angela;  
Sillivos, Mary E.;  
Smith, Douglas;  
Snell, Linda;  
Sorrell, Dorothy;  
Sparks, Amargia;  
Spicer, Danielle M. M.;  
Sptaru, Ezack;  
Stallcup, Karen;  
Stanman, Sharon K.;  
Steinburg, Joan L.;  
Stevens, Nancy L.;  
Strafford, Krista J.;  
Strauss, Erin M.;  
Strohm, Steven M.;  
Sturgeon, Kenneth D.;  
Tavernite, Vincent A.;  
Taylor, Elaine;

---



PART	#	ENDNOTE
		<p>Taylor, Elaine;  The Family of Linda S. Spangler;  Thomas, Etta I.;  Tietje, Deborah J.;  Townsend, Mary K.;  Trunnell, Jay R.;  Van Guilder, Coleen;  Viren, Angel;  Wall, Richard L.;  Wallace, Kimberley L.;  Walls, Kenneth E., Jr.;  Walt, Darin R.;  Watson, Jeannie M.;  Weaver, Frank H.;  Wells, Sharon L.;  West, Carl P.;  Wheeler, James P.;  Whitley, Ted &amp; Lilly;  Wicker, Guy N.;  Woods, Gregory A.;  Wright, Sharon G.;  MSP Recovery Inc.</p>
4.	13	<p>Each client whose information is withheld is a client of WisnerBaum. As described in Part 3, pursuant to my referral agreement with WisnerBaum, I received over the reporting amount from contingency fee cases involving these clients. I will divest of all outstanding contingency fee claims arising under my agreement with WisnerBaum as described in Part 3. Fifty of the cases concern claims for damages resulting from the Woolsey fire and three of the cases concern claims for Roundup-induced non-Hodgkins lymphoma.</p>
6.	5.6.1	<p>I will divest this asset if confirmed.</p>
6.	5.6.2	<p>I will divest this asset if confirmed.</p>

PART	#	ENDNOTE
6.	5.11	The below oil and gas Leases that produced between \$201-\$1,000 in reportable income attributable to the filer.;
		Coffeyville Resources, Inc (Creek, OK); CV Supply & Trading LLC (Creek, OK); Contango Oil & Gas Management LLC (Dewey, OK); Gulfport Midcon LLC (Grady, OK); Ovintiv USA Inc. (Kingfisher, OK); Circle 9 Resources LLC (Pottawatomie, OK); XTO Energy Inc (Gaines, TX); Hilcorp Energy/San Juan (Starr, TX); Riley Permian Operating Co., LLC (Yoakum, TX).
6.	6.2	Reportable leases listed in the endnote to Part 6, Line 5.11
6.	7.2.3	I will divest this asset if confirmed.
6.	7.2.4	I will divest this asset if confirmed.
6.	7.2.9	I will divest this asset if confirmed.
6.	7.2.10	I will divest this asset if confirmed.
6.	7.2.11	I will divest this asset if confirmed.
6.	7.2.12	I will divest this asset if confirmed.
6.	7.2.13	I will divest this asset if confirmed.
6.	7.5	Reportable leases listed in the endnote to Part 6, Line 5.11
6.	18	I subsequently transferred ownership of the trade/service marks that were subject to this licensing arrangement to a third-party for no compensation.

# 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 (note: certain PAS nominees and appointees are required to report all mortgages); (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

5 U.S.C. § 13101 et seq., 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 5 U.S.C. §§ 13107 and § 13122(b)(1) 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.

## Public Burden Information

This collection of information is estimated to take an average of ten hours per response, including time for reviewing the instructions, gathering the data needed, and completing the form. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Program Counsel, U.S. Office of Government Ethics (OGE) 250 E Street, S.W., Suite 750, Washington, DC 20024-3249.

Pursuant to the Paperwork Reduction Act, as amended, an agency may not conduct or sponsor, and no person is required to respond to, a collection of information unless it displays a currently valid OMB (that control number 3209-0001, is displayed here and at the top of the first page of this OGE Form 278e).

---