OGE Form 278e (Updated 08/2024) (Expires 08/31/2027)
U.S. Office of Government Ethics; 5 C.F.R. part 2634 | Form Approved: OMB No. (3209-0001)

Report Type: Termination Report
Year (Annual Report only):
Date of Appointment: 02/2021
Date of Termination: 12/2024
Appointment Type: PAS

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

Filer's Information

Vilsack, Thomas J

OSEC-Secretary, Department of Agriculture

Date of Termination: 12/18/2024

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

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

/s/ Vilsack, Thomas J [electronically signed on 01/08/2025 by Vilsack, Thomas J 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/ Bender, Stuart, Certifying Official [electronically signed on 01/21/2025 by Bender, Stuart in Integrity.gov]

Other review conducted by

U.S. Office of Government Ethics Certification

/s/ Granahan, Megan, Certifying Official [electronically signed on 02/07/2025 by Granahan, Megan in Integrity.gov]

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	Iowa Public Employment System (Defined Benefit Plan. Value not readily ascertainable.)		N/A		Retirement Income (annual)	$36,000
2	IRA #1		No			
2.1	U.S. Money Market Account (cash)		N/A	$1,001 - $15,000		None (or less than $201)
2.2	Columbia Overseas Value Fund (COSSX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.3	DFA Global Real Estate (DFGEX)		Yes	None (or less than $1,001)		None (or less than $201)
2.4	Fidelity Real Estate Index Fund (FSRNX)		Yes	None (or less than $1,001)		None (or less than $201)
2.5	John Hancock Disciplined Value (JVMIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.6	Lord Abbett Short Duration (LDLFX)		Yes	None (or less than $1,001)		None (or less than $201)
2.7	Pimco International Bond Fund (PFUPX)		Yes	None (or less than $1,001)		None (or less than $201)
2.8	Pimco Long Term Real Return (PRTPX)		Yes	None (or less than $1,001)		None (or less than $201)
2.9	Principal Midcap (PCBIX)		Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.10	Columbia Mortgage Opportunities Fund Institutional 2 Class Shares (CLMVX)		Yes	$1,001 - $15,000		None (or less than $201)
2.11	Eaton Vance Emerging Markets Local Income Fund Class I Shares (EEIIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.12	Federated Kaufmann Small Cap Fund Institutional Class Shares (FKAIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.13	FT Cboe Vest US Equity Deep Buffer ETF - August (DAUG)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.14	Principal Global Real Estate Securities Fund Institutional Class Shares (POSIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.15	PIMCO International Bond Fund (US Dollar-Hedged) Class I-2 Shares (PFBPX)		Yes	$1,001 - $15,000		None (or less than $201)
2.16	JPMorgan Growth and Income Fund Class I Shares (VGIIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.17	Federated Short-Term Income Fund Institutional Shares (FSTYX)		Yes	$1,001 - $15,000		None (or less than $201)
2.18	Fidelity Advisor International Capital Appreciation Fund Class I Shares (FCPIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.19	MFS Growth Fund Class I Shares (MFEIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.20	Invesco Oppenheimer Total Return Bond Fund Class Y Shares (OPBYX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.21	Victory SophusEmerging Markets Fund Class Y Shares (RSENX)		Yes	None (or less than $1,001)		None (or less than $201)
2.22	Parametric Commodity Strategy Fund Institutional Class Shares (EIPCX)		Yes	$1,001 - $15,000		None (or less than $201)
2.23	Columbia Small Cap Value Fund I Institutional 2 Class Shares (CUURX)		Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.24	John Hancock Investment Grade Bond Fund Class I Shares (TIUSX)		Yes	$1,001 - $15,000		None (or less than $201)
2.25	Fidelity Long-Term Treasury Bond Index Fund (FNBGX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.26	Fidelity Advisor International Small Cap Fund Class I Shares (FIXIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.27	Eaton Vance Floating-Rate Fund Institutional Class Shares (EIBLX)		Yes	$1,001 - $15,000		None (or less than $201)
2.28	Cohen & SteersGlobal Realty Shares, Inc Class I Shares (CSSPX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.29	DFA International Value Portfolio Institutional Class Shares (DFIVX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.30	Fidelity Mid Cap Index Fund (FSMDX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.31	FT Cboe Vest U.S. Equity Deep Buffer ETF - October FT Cboe Vest U.S. Equity Deep Buffer ETF - October (DOCT)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.32	Goldman Sachs Emerging Markets Equity Insights Fund Institutional Class Shares (GERIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.33	JPMorgan Core Bond Fund Class I Shares (WOBDX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.34	JPMorgan Large Cap Growth Fund Class I Shares (SEEGX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.35	Putnam Small Cap Growth Fund Class Y Shares (PSYGX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.36	PIA High Yield Fund Institutional Class Shares (PHYSX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
3	UDIA Thrift and Savings Plan (401K)		No			

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3.1	Dodge and Cox Income Fund	Yes	$50,001 - $100,000		None (or less than $201)
3.2	Fidelity US Bond Index	Yes	$15,001 - $50,000		None (or less than $201)
3.3	Principal Div Real Asset	Yes	$50,001 - $100,000		None (or less than $201)
3.4	Fidelity 500 Index Fund	Yes	$15,001 - $50,000		None (or less than $201)
3.5	T. Rowe Price Large Cap Growth	Yes	$15,001 - $50,000		None (or less than $201)
3.6	DFA US Large Cap Val	Yes	$1,001 - $15,000		None (or less than $201)
4	AB Municipal Bond Int'l Strategies Ad Fund	Yes	$1,001 - $15,000		None (or less than $201)
5	Columbia Overseas Value Fund	Yes	$1,001 - $15,000		None (or less than $201)
6	Delaware Small Cap Value Insel OL Fund	Yes	$1,001 - $15,000		None (or less than $201)
7	DFA US Large Cap Value Portfolio Institutional Class Fund	Yes	$1,001 - $15,000		None (or less than $201)
8	Eaton Vance Emerging Markets Local Income Fund	Yes	$1,001 - $15,000		None (or less than $201)
9	Thornburg Limited Term Municipal Fund Class	Yes	$15,001 - $50,000		$201 - $1,000

3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	Iowa Public Employment Retirement System	Des Moines, Iowa	I will continue to participate in this defined benefit plan.	1/1993
2	UDIA Thrift and Savings Plan (401K)	Arlington, Virginia	I will continue to participate in this defined contribution plan. The plan sponsor will not make further contributions after my separation.	1/2017
3	The World Food Prize Foundation	Des Moines, Iowa	I will become the Chief Executive Oficer for this non-profit organization in March, 2025.	3/2025
4	Colorado State University	Fort Collins, Colorado	I will become a Fellow employed by Colorado State University in March, 2025.	5/2025
5	The Global Dairy Platform	Rosemont, Illinois	I will serve the Global Dairy Platform as a Chair of its convening conference (to be held in Europe in Autumn 2025.)	3/2025

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	Iowa Public Employee Retirement System (Defined Benefit Plan. Value Not Readily Ascertainable)		N/A		Retirement Income	
2	IRA #2		No			
2.1	Columbia Overseas Value Fund (COSXX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.2	Fidelity MidCap Index Fund (FSMDX)		Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.3	John Hancock Disciplined Value Mid Cap (JVMIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.4	Principal Midcap Fund (PCBIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.5	Principal Global Real Estate Securities Fund (POSIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.6	Columbia Mortgage Opportunities Fund Institutional 2 Class Shares (CLMVX)		Yes	$1,001 - $15,000		None (or less than $201)
2.7	FT Cboe Vest US Equity Deep Buffer ETF - August (DAUG)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.8	First Trust Cboe Vest US Equity Deep Buffer ETF (Exchange Traded Fund)		Yes	$1,001 - $15,000		None (or less than $201)
2.9	Eaton Vance Emerging Markets Local Income Fund Class I Shares (EEIIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.10	Fidelity Advisor Small Cap Growth Fund Class I Shares (FCIGX)		Yes	None (or less than $1,001)		None (or less than $201)
2.11	Fidelity Advisor International Capital Appreciation Fund Class I Shares (FCPIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.12	Fidelity Advisor Investment Grade Bond Fund Class I Shares (FGBPX)		Yes	$1,001 - $15,000		None (or less than $201)
2.13	Federated Institutional High Yield Bond Fund Institutional Shares (FIHBX)		Yes	$1,001 - $15,000		None (or less than $201)
2.14	Fidelity International Index Fund (FSPSX)		Yes	$1,001 - $15,000		None (or less than $201)
2.15	Federated Short-Term Income Fund Institutional Shares (FSTYX)		Yes	$1,001 - $15,000		None (or less than $201)
2.16	Fidelity 500 Index Fund (FXAIX)		Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.17	John Hancock Bond Fund Class I Shares (JHBIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.18	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.19	Victory SophusEmerging Markets Fund Class Y Shares (RSENX)		Yes	$1,001 - $15,000		None (or less than $201)
2.20	JPMorgan Growth and Income Fund Class I Shares (VGIIX)		Yes	$1,001 - $15,000		None (or less than $201)
2.21	Federated Kaufmann Small Cap Fund Institutional Class Shares (FKAIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.22	MFS Growth Fund Class I Shares (MFEIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.23	PIMCO International Bond Fund (US Dollar-Hedged) Class I-2 Shares (PFBPX)		Yes	$1,001 - $15,000		None (or less than $201)
2.24	Invesco Oppenheimer Total Return Bond Fund Class Y Shares (OPBYX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.25	Parametric Commodity Strategy Fund Institutional Class Shares (EIPCX)		Yes	$1,001 - $15,000		None (or less than $201)
2.26	Columbia Small Cap Value Fund I Institutional 2 Class Shares (CUURX)		Yes	$1,001 - $15,000		None (or less than $201)
2.27	John Hancock Investment Grade Bond Fund Class I Shares (TIUSX)		Yes	$1,001 - $15,000		None (or less than $201)
2.28	Fidelity Long-Term Treasury Bond Index Fund (FNBGX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.29	Fidelity Advisor International Small Cap Fund Class I Shares (FIXIX)		Yes	None (or less than $1,001)		None (or less than $201)
2.30	Eaton Vance Floating-Rate Fund Institutional Class Shares (EIBLX)		Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.31	Cohen & SteersGlobal Realty Shares, Inc Class I Shares (CSSPX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.32	DFA International Value Portfolio Institutional Class Shares (DFIVX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.33	FT Cboe Vest U.S. Equity Deep Buffer ETF - October FT Cboe Vest U.S. Equity Deep Buffer ETF - October (DOCT)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.34	Goldman Sachs Emerging Markets Equity Insights Fund Institutional Class Shares (GERIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.35	JPMorgan Core Bond Fund Class I Shares (WOBDX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.36	JPMorgan Large Cap Growth Fund Class I Shares (SEEGX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.37	Putnam Small Cap Growth Fund Class Y Shares (PSYGX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
2.38	PIA High Yield Fund Institutional Class Shares (PHYSX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Farmland (rented), Davis County, Iowa	N/A	$1,000,001 - $5,000,000	Rent or Royalties	$50,001 - $100,000
2	Brokerage Account #1	No			
2.1	Touchstone Mid Cap Value Fund (TCVYX)	Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.2	Lazard US Equity Concentrated Portfolio Fund (LEVIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.3	JP Morgan Small Cap Equity Fund (VSEIX)		Yes	None (or less than $1,001)		None (or less than $201)
2.4	Aberdeen Emerging Markets Fund (ABEMX)		Yes	None (or less than $1,001)		None (or less than $201)
2.5	Eaton Vance Income Fund of Boston Fund (EIBIX)		Yes	None (or less than $1,001)		None (or less than $201)
2.6	Edgewood Growth Fund (EGFIX)		Yes	None (or less than $1,001)		None (or less than $201)
2.7	Hartford Mid Cap Fund (HFMIX)		Yes	None (or less than $1,001)		$201 - $1,000
2.8	Lazard International Equity Portfolio Fund (LZIEX)		Yes	None (or less than $1,001)		None (or less than $201)
2.9	Hancock Classic Value Fund		Yes	None (or less than $1,001)		None (or less than $201)
2.10	US Large Cap Value Portfolio Institutional Class Shares (DFLVX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.11	Fidelity Advisor Small Cap Growth Fund Class I Shares (FCIGX)		Yes	$1,001 - $15,000		None (or less than $201)
2.12	Victory SophusEmerging Markets Fund Class Y Shares (RSENX)		Yes	$1,001 - $15,000		None (or less than $201)
2.13	PIA High Yield Fund Institutional Class Shares (PHYSX)		Yes	$1,001 - $15,000		None (or less than $201)
2.14	Columbia Small Cap Value Fund I Institutional 2 Class Shares (CUURX)		Yes	$1,001 - $15,000		None (or less than $201)
2.15	FT Cboe Vest International Equity Buffer ETF - March FT Cboe Vest International Equity Buffer ETF - March (YMAR)		Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
2.16	Eaton Vance Emerging Markets Local Income Fund Class I Shares (EEIIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
2.17	Vanguard Mid-Cap Index Fund Admiral Shares (VIMAX)		Yes	$1,001 - $15,000		None (or less than $201)
2.18	PIMCO International Bond Fund (U.S. Dollar-Hedged) I-2 (PFBPX)		Yes	$1,001 - $15,000		None (or less than $201)
3	Brokerage Account #2		No			
3.1	U.S. Brokerage Money Market Account (cash)		N/A	$1,001 - $15,000		None (or less than $201)
3.2	Columbia Mortgage Opportunities Fund Institutional 2 Class (CLMVX)		Yes	None (or less than $1,001)		None (or less than $201)
3.3	Columbia Overseas Value Fund (COSSX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
3.4	DFA Global Real Estate (DFGEX)		Yes	None (or less than $1,001)		None (or less than $201)
3.5	FT Cboe Vest US Equity Deep Buffer ETF - August (DAUG)		Yes	$1,001 - $15,000		None (or less than $201)
3.6	Emerging Markets Portfolio Institutional Class Shares (DFEMX)		Yes	$1,001 - $15,000		None (or less than $201)
3.7	BNY Mellon International Core Equity Fund Class I Shares (DIERX)		Yes	$1,001 - $15,000		None (or less than $201)
3.8	First Trust Exchange-Traded Fund VIII FT CBOE VEST U S Equity Deep Buffer ETF		Yes	$1,001 - $15,000		None (or less than $201)
3.9	Fidelity Advisor International Capital Appreciation Fund Class I Shares (FCPIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.10	Fidelity Advisor International Small Cap Fund Class I Shares (FIXIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.11	Federated Kaufmann Small Cap Fund Institutional Class Shares (FKAIX)		Yes	$1,001 - $15,000		None (or less than $201)

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
3.12	Nuveen Limited Term Municipal Bond Fund Class I Shares (FLTRX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
3.13	John Hancock Funds III Disciplined Value Mid Cap Fund Institutional Class Shares (JVMIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.14	MFS Growth Fund Class I Shares (MFEIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
3.15	Nuveen Intermediate Duration Municipal Bond Fund Class I Shares (NUVBX)		Yes	$15,001 - $50,000		$201 - $1,000
3.16	MFS Mid Cap Growth Fund Class I Shares (OTCIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.17	JPMorgan Large Cap Growth Fund Class I Shares (SEEGX)		Yes	$1,001 - $15,000		None (or less than $201)
3.18	Thornburg Intermediate Municipal Fund Class I Shares (THMIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.19	JPMorgan Growth and Income Fund Class I Shares (VGIIX)		Yes	$1,001 - $15,000		None (or less than $201)
3.20	First Trust Exchange Traded Fund VIII CBOE VEST International Equity Buffer ETF		Yes	$1,001 - $15,000		None (or less than $201)
3.21	DFA International Value Portfolio Institutional Class Shares (DFIVX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
3.22	Eaton Vance Emerging Markets Debt Opportunities Fund Class I Shares (EIDOX)	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
3.23	Goldman Sachs Emerging Markets Equity Insights Fund Institutional Class Shares (GERIX)	See Endnote	Yes	None (or less than $1,001)		None (or less than $201)
4	Baird Brokerage Fund		No			
4.1	U.S. Bancorp (USB)		N/A	$15,001 - $50,000	Dividends	$201 - $1,000

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
4.2	State Univ IA Rev RFDG Bond		N/A	$1,001 - $15,000		None (or less than $201)
4.3	State Univ IA Univ Rev Bond		N/A	$15,001 - $50,000	Interest	$201 - $1,000
4.4	University NORTH IA Bond		N/A	$1,001 - $15,000	Interest	$201 - $1,000
4.5	Iowa High Ed Ln Auth Bond		N/A	$1,001 - $15,000	Interest	$201 - $1,000
4.6	Coralville IA Bond		N/A	$15,001 - $50,000	Interest	$201 - $1,000
4.7	State Univ IA Athletic Rev Bond		N/A	$1,001 - $15,000	Interest	$201 - $1,000
4.8	Invesco QQQ		Yes	$1,001 - $15,000		None (or less than $201)
4.9	Vanguard Growth VUG		Yes	$15,001 - $50,000		None (or less than $201)
5	U.S. bank (cash)		N/A	$1,001 - $15,000		None (or less than $201)
6	U.S. bank (Certificates of Deposit)		N/A	$15,001 - $50,000	Interest	$201 - $1,000
7	New York Life (whole life insurance policy)		N/A	$1,001 - $15,000		None (or less than $201)
8	USDA Conservation Reserve Program (CRP)	See Endnote	N/A		CRP rental payments	$14,726
9	Iowa Advisor 529 (College Savings Plan) Account #1		No			
9.1	IA Advisor 529 Account - Age 11-15 Option Class A Voya International Index Option	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
10	Iowa Advisor 529 (College Savings Plan) Account #2		No			

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
10.1	IA Advisor 529 Account - Age 6-10 Option Class A Voya Intermediate Bond Option	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
11	Iowa Advisor 529 (College Savings Plan) Account #3		No			
11.1	IA Advisor 529 Account - Age 6-10 Option Class A Voya Intermediate Bond Option	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
12	Iowa Advisor 529 (College Savings Plan) Account #4		No			
12.1	IA Advisor 529 Account - Age 0-5 Option Class A Voya Government Money Market Option	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
13	Iowa Advisor 529 (College Savings Plan) Account #5		No			
13.1	IA Advisor 529 Account - Age 11-15 Option Class A Voya International Index Option	See Endnote	Yes	$1,001 - $15,000		None (or less than $201)
14	Municipal Bond for Iowa Board of Regents-University of Iowa Hospital		N/A	$15,001 - $50,000		None (or less than $201)

7. Transactions

#	DESCRIPTION	TYPE	DATE	AMOUNT
1	Cohen & SteersGlobal Realty Shares, Inc Class I Shares (CSSPX)	Purchase	07/08/2024	$1,001 - $15,000
2	Columbia Overseas Value Fund Institutional 2 Class Shares (COSSX)	Sale	05/22/2024	$1,001 - $15,000
3	Federated Kaufmann Small Cap Fund Institutional Class Shares (FKAIX)	Sale	05/22/2024	$1,001 - $15,000
4	DFA International Value Portfolio Institutional Class Shares (DFIVX)	Purchase	05/22/2024	$1,001 - $15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
5	Fidelity Mid Cap Index Fund (FSMDX)	Purchase	05/08/2024	$1,001 - $15,000
6	Fidelity Long-Term Treasury Bond Index Fund (FNBGX)	Sale	04/18/2024	$1,001 - $15,000
7	FT Cboe Vest U.S. Equity Deep Buffer ETF - October FT Cboe Vest U.S. Equity Deep Buffer ETF - October (DOCT)	Purchase	11/04/2024	$1,001 - $15,000
8	FT Cboe Vest US Equity Deep Buffer ETF - August (DAUG)	Sale	05/09/2024	$1,001 - $15,000
9	PrincipalGlobal Real Estate Securities Fund Institutional Class Shares (POSIX)	Sale	07/09/2024	$1,001 - $15,000
10	Invesco Oppenheimer Total Return Bond Fund Class Y Shares (OPBYX)	Sale	01/30/2024	$1,001 - $15,000
11	JPMorgan Core Bond Fund Class I Shares (WOBDX)	Purchase	01/30/2024	$1,001 - $15,000
12	JPMorgan Large Cap Growth Fund Class I Shares (SEEGX)	Purchase	01/31/2024	$1,001 - $15,000
13	MFS Growth Fund Class I Shares (MFEIX)	Sale	01/31/2024	$1,001 - $15,000
14	Putnam Small Cap Growth Fund Class Y Shares (PSYGX)	Purchase	01/26/2024	$1,001 - $15,000
15	PIA High Yield Fund Institutional Class Shares (PHYSX)	Purchase	04/19/2024	$1,001 - $15,000
16	Cohen & SteersGlobal Realty Shares, Inc Class I Shares (CSSPX)	Purchase	07/05/2024	$1,001 - $15,000
17	Columbia Overseas Value Fund Institutional 2 Class Shares (COSSX)	Sale	05/22/2024	$1,001 - $15,000
18	DFA International Value Portfolio Institutional Class Shares (DFIVX)	Purchase	05/22/2024	$1,001 - $15,000
19	Federated Kaufmann Small Cap Fund Institutional Class Shares (FKAIX)	Sale	05/22/2024	$1,001 - $15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
20	Fidelity Long-Term Treasury Bond Index Fund (FNBGX)	Sale	04/18/2024	$1,001 - $15,000
21	FT Cboe Vest US Equity Deep Buffer ETF - August (DAUG)	Sale	05/09/2024	$1,001 - $15,000
22	FT Cboe Vest U.S. Equity Deep Buffer ETF - October FT Cboe Vest U.S. Equity Deep Buffer ETF - October (DOCT)	Purchase	11/04/2024	$1,001 - $15,000
23	PrincipalGlobal Real Estate Securities Fund Institutional Class Shares (POSIX)	Sale	07/09/2025	$1,001 - $15,000
24	Invesco Oppenheimer Total Return Bond Fund Class Y Shares (OPBYX)	Sale	01/30/2024	$1,001 - $15,000
25	JPMorgan Core Bond Fund Class I Shares (WOBDX)	Purchase	01/30/2024	$1,001 - $15,000
26	JPMorgan Large Cap Growth Fund Class I Shares (SEEGX)	Purchase	01/31/2024	$1,001 - $15,000
27	MFS Growth Fund Class I Shares (MFEIX)	Sale	01/31/2024	$1,001 - $15,000
28	Putnam Small Cap Growth Fund Class Y Shares (PSYGX)	Purchase	11/27/2024	$1,001 - $15,000
29	PIA High Yield Fund Institutional Class Shares (PHYSX)	Purchase	04/15/2024	$1,001 - $15,000
30	Columbia Overseas Value Fund Institutional 2 Class Shares (COSSX)	Sale	05/22/2024	$1,001 - $15,000
31	DFA International Value Portfolio Institutional Class Shares (DFIVX)	Purchase	05/22/2024	$1,001 - $15,000
32	Eaton Vance Emerging Markets Debt Opportunities Fund Class I Shares (EIDOX)	Purchase	10/15/2024	$1,001 - $15,000
33	Eaton Vance Emerging Markets Local Income Fund Class I Shares (EEIIX)	Sale	10/15/2024	$1,001 - $15,000
34	Lazard US Equity Concentrated Portfolio Institutional Shares (LEVIX)	Sale	05/08/2024	$1,001 - $15,000

#	DESCRIPTION	TYPE	DATE	AMOUNT
35	MFS Growth Fund Class I Shares (MFEIX)	Sale	01/31/2024	$1,001 - $15,000
36	Nuveen Limited Term Municipal Bond Fund Class I Shares (FLTRX)	Sale	01/08/2025	$1,001 - $15,000

8. Liabilities

None

9. Gifts and Travel Reimbursements

None

Endnotes

PART	#	ENDNOTE
2.	2.2	This mutual fund was sold on May 22, 2024.
2.	2.12	This mutual fund was sold on May 22, 2024.
2.	2.13	This mutual fund was sold on May 9, 2024.
2.	2.14	This mutual fund was sold on July 9, 2024.
2.	2.19	This mutual fund was sold on January 31, 2024.
2.	2.20	This mutual fund was sold on January 30, 2024.
2.	2.25	This mutual fund was sold on April 18, 2024.
2.	2.28	This mutual fund was purchased on July 8, 2024.

PART	#	ENDNOTE
2.	2.29	This mutual fund was purchased on May 22, 2024.
2.	2.30	This mutual fund was purchased on May 8, 2024.
2.	2.31	This mutual fund was purchased on November 4, 2024.
2.	2.32	This mutual fund was purchased on May 17, 2024. The amount purchased was below the $1,000 transaction reporting threshold in Section 7 (Transactions) of this report.
2.	2.33	This mutual fund was purchased on January 30, 2024.
2.	2.34	This mutual fund was purchased on January 31, 2024.
2.	2.35	This mutual fund was purchased on January 26, 2024.
2.	2.36	This mutual fund was purchased on April 19, 2024.
5.	2.1	THis mutual fund was sold on May 22, 2024.
5.	2.5	This mutual fund was sold on July 9, 2024.
5.	2.7	This mutual fund was sold on May 9, 2024.
5.	2.21	This mutual fund was sold on May 22, 2024.
5.	2.22	This mutual fund was sold on January 31, 2024.
5.	2.24	This mutual fund was sold on January 30, 2024.
5.	2.28	This mutual fund was sold on April 18, 2024.
5.	2.31	This mutual fund was purchased on July 5, 2024.
5.	2.32	This mutual fund was purchased on May 22, 2024.
5.	2.33	This mutual fund was purchased on November 4, 2024.
5.	2.34	This mutual fund was purchased on May 17, 2024. The amount purchased was below the $1,000 transaction reporting threshold in Section 7 (Transactions) of this report.
5.	2.35	This mutual fund was purchased on January 30, 2024.
5.	2.36	This mutual fund was purchased on January 31, 2024.

PART	#	ENDNOTE
5.	2.37	This mutual fund was purchased on November 27, 2024.
5.	2.38	This mutual fund was purchased on April 15, 2024.
6.	2.2	This mutual fund was sold on May 8, 2024.
6.	2.10	This mutual fund was sold on May 8, 2024. The amount sold was below the $1,000 transaction reporting threshold in Section 7 (Transactions) of this report.
6.	2.16	This mutual fund was sold on October 15, 2024.
6.	3.3	This mutual fund was sold on May 22, 2024.
6.	3.12	This mutual fund was partially sold on January 8, 2025.
6.	3.14	This mutual fund was sold on January 31, 2024.
6.	3.21	This mutual fund was purchased on May 22, 2024.
6.	3.22	This mutual fund was purchased on October 15, 2024.
6.	3.23	This mutual fund was purchased on May 17, 2024. The amount purchased was below the $1,000 transaction reporting threshold in Section 7 (Transactions) of this report.
6.	8	USDA's Conservation Reserve Program pays a yearly rental in exchange for farmland owners removing environmentally sensitive land from agricultural production or planting species that will improve environmental quality.This payment concerns the farmland property identified in Part 6, Item 1.
6.	9.1	Established for family member.
6.	10.1	Established for family member.
6.	11.1	Established for family member.
6.	12.1	Established for family member.
6.	13.1	Established for family member.

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.

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