From:	LNAPPS1.USOGE@oge.gov		
То:	Marjorie R. Levine		
Subject:	New CD Assignment: Please review		
Date:	Monday, March 1, 2021 12:07:11 PM		

A Certificate of Divestiture for Kerry is pending ACTION: Review in Process. Please click the link below.

(b)(5) internal agency network

	Refe	rral	to	D	0	S
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From: Marjorie R. Levine <mlevine@oge.gov>

Sent: Wednesday, March 3, 2021 11:28 PM
To: Alexander, M. J. (b) (6)
Subject: Re: Kerry CD - [Message contains CUI]

CONTROLLED

Yes, two in one day (busy times!) 11am works for me. I'll give you a call then.

Thanks,

Marjie

From: Marjorie R. Levine <mlevine@oge.gov <<u>mailto:mlevine@oge.gov</u>>> Sent: Wednesday, March 3, 2021 4:50 PM

To: Alexander, M. J. (b) (6) <<u>mailto:</u>(b) (6)

Subject: Kerry CD - [Message contains CUI]

>>

CONTROLLED Alex, I'm reviewing the CD request submitted for John Kerry and my understanding is you are the agency POC. Could we set up a time to discuss a few questions I have? I'm happy to have a short call between now and 5:30, where I can give you the information I'm seeking and you can get back to me separately, or we could find a time tomorrow. Anytime between 11 and 4 works for me tomorrow.

Thank you, Marjie

Marjorie Levine Assistant Counsel, Ethics Law & Policy Branch Office of Government Ethics mlevine@oge.gov <<u>mailto:mlevine@oge.gov</u>> <<u>mailto:mlevine@oge.gov</u>> <<u>mailto:mlevine@oge.gov</u>>> (202) 482-9268 Follow OGE @OfficeGovEthics

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Hi Marjie,

I am available now

Thanks, Elaine

From: Marjorie R. Levine
Sent: Friday, March 5, 2021 10:37 AM
To: Elaine Newton <enewton@oge.gov>
Subject: RE: Kerry CD

Elaine,

Could I give you a quick call about this CD?

Thanks, Marjie

From: Marjorie R. Levine
Sent: Thursday, March 4, 2021 5:45 PM
To: Elaine Newton <<u>enewton@oge.gov</u>>
Subject: Kerry CD

Hi Elaine,

I just forwarded the Kerry CD to you for review. I realized when I started working on the CD template that (b) (5)

. I am not sure about how to (b) (5) , so would like to discuss that with you.

I'm available tomorrow to discuss the CD and any questions you may have about my notes.

Thanks, Marjie

Marjorie Levine Assistant Counsel, Ethics Law & Policy Branch Office of Government Ethics mlevine@oge.gov (202) 482-9268 Follow OGE @OfficeGovEthics

From:	Marjorie R. Levine
To:	Elaine Newton
Subject:	FW: CD question - [Message contains CUI]
Date:	Friday, March 5, 2021 3:39:59 PM

Info below about the (b) (5)

Thanks, Marjie

From: Mariar	ie R. Levine < <u>mlevine@o</u>				
Sent: Thursda	ay, March 4, 2021 5:32 Pl	PM			
	r, M. J. < <mark>(b) (6)</mark> CD question - [Message o	contains CUI]			
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at COB.					
Thanks,					
Marjie					
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From: Maria	ria P. Lavina emlavina	@oge.gov < <u>mailto:mlevine</u>			
	ay, March 4, 2021 5:15		<u>Imore: Ron</u>		
	er, M. J. <mark>(b) (6)</mark>		>>		
To: Alexande	CD question - [Message	ge contains CUI]			
)				

Thanks,	
Marjie	

erral to DOS	
From: Marjorie R. Levine <mlevine@oge.gov <<u="">mailto:mlevine@oge.gov <mailto:mlevine@oge.gov< u="">>>></mailto:mlevine@oge.gov<></mlevine@oge.gov>	
Sent: Thursday, March 4, 2021 4:48 PM	
To: Alexander, M. J. (b) (6) < <u>mailto(b)</u> (6)	>>>
Subject: RE: CD question - [Message contains CUI]	
CONTROLLED	
Alex,	
Just confirming you received my question below?	
Thanks,	
Marjie	
From: Marjorie R. Levine	
Sent: Thursday, March 4, 2021 3:04 PM	
To: 'Alexander, M. J.' <(b) (6) < <u>mailto(b)</u> (6) < <u>mailto(b)</u> (6) (6)	>>
Subject: Re: CD question - [Message contains CUI]	
CONTROLLED	
Alex,	
Is it possible for you to send me a (b) (5)	
Thanks,	
Marjie	
eferral to DOS	

Referral to DOS	

From: Marjorie R. Levine <mlevine@oge.gov <<u="">mailto:mlevine@oge.gov</mlevine@oge.gov>
<mailto:mlevine@oge.gov%20%3cmailto:mlevine@oge.gov>>>></mailto:mlevine@oge.gov%20%3cmailto:mlevine@oge.gov>
Sent: Thursday, March 4, 2021 12:10 PM
To: Alexander, M. J. (b) (6) <a>
<u><mailto(b) (6)<="" u=""> >>>></mailto(b)></u>
Subject: CD question - [Message contains CUI]
CONTROLLED
Alex.

The spreadsheet of (b) (5)

Thank you, Marjie

Marjorie Levine Assistant Counsel, Ethics Law & Policy Branch Office of Government Ethics mlevine@oge.gov <mailto:mlevine@oge.gov> <mailto:mlevine@oge.gov>> <mailto:mlevine@oge.gov <mailto:mlevine@oge.gov%20%3cmailto:mlevine@oge.gov>> <mailto:mlevine@oge.gov%20%3cmailto:mlevine@oge.gov>> <mailto:mlevine@oge.gov%20%3cmailto:mlevine@oge.g

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Referral to DOS		

Sent from Workspace ONE Boxer

On March 7, 2021 at 12:54:32 PM EST, Marjorie R. Levine <mlevine@oge.gov> wrote:

CONTROLLED
Hi Alex,
I hope you're having a good weekend. On Friday, Elaine asked me for additional information about the some of the holdings on the filer's 278. You have provided me with most of the information she requested, but I wanted to clarify one thing about (b)(5), (b)(6) and some info (b)(3) . I understand from speaking to you that (b) (5) . but I want to determine (b) (5) . Could you clarify (b) (5)
Also, there is no need to get back to me today, but if you could send me the information by tomorrow morning, I would appreciate it.
Thank you, Marjie
Marjorie Levine Assistant Counsel, Ethics Law & Policy Branch Office of Government Ethics mlevine@oge.gov < <u>mailto:mlevine@oge.gov</u> > (202) 482-9268 Follow OGE @OfficeGovEthics

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I have updated my notes/FDTS for this CD to provide the information you requested on Friday. Please let me know if you need anything further.

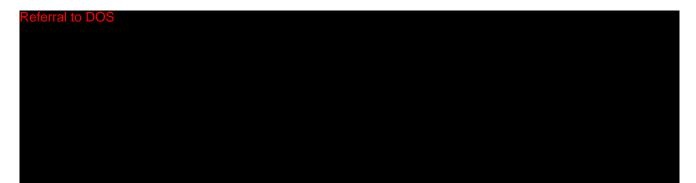
Thank you, Marjie

Marjorie Levine Assistant Counsel, Ethics Law & Policy Branch Office of Government Ethics <u>mlevine@oge.gov</u> (202) 482-9268 Follow OGE @OfficeGovEthics

From:	LNAPPS1.USOGE@oge.gov
To:	David J. Apol
Subject:	CD for your review and approval
Date:	Monday, March 8, 2021 1:03:33 PM

A Certificate of Divestiture for Kerry is pending ACTION: Final Review and Certification. Please click the link below.

(b)(5) internal agency network



From: Elaine Newton <enewton@oge.gov>
Sent: Monday, March 8, 2021 4:51 PM
To: Alexander, M. J.
b) (6)
Cc: Marjorie R. Levine <mlevine@oge.gov>; Marshall, Veda <vemarsha@oge.gov>; Elaine Newton
<enewton@oge.gov>
Subject: Kerry Certificate of Divestiture - [Message and attachment(s) contain CUI]

CONTROLLED Email and attachment(s) contain CUI. Attachments released below

Good Afternoon:

In response to your request of March 1, 2021, attached is Certificate of Divestiture, OGE-2021-022 for John Kerry, Department of State. Please forward the certificate to Mr. Kerry.

If there are any questions, you may contact Marjorie Levin at 202-482-9268. Please confirm receipt of this email by replying to all.

Thank you. Elaine Newton Associate Counsel U.S. Office of Government Ethics 1201 New York Ave., NW, Suite 500 Washington, DC 20005-3915 Telephone: 202-482-9265

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The attached document contains CUI that requires protection and safeguarding in a manner that prevents unauthorized disclosure of CUI. (e.g., locked file cabinet, restricted access to CUI, etc.)

If you need additional information regarding the attached document containing CUI, please contact Elaine Newton, enewton@oge.gov or 202-482-9265.

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UNITED STATES OFFICE OF

CERTIFICATE OF DIVESTITURE

CERTIFICATE NO: OGE-2021-022

DATE OF ISSUANCE: March 8, 2021

ELIGIBLE PERSON: BNY Mellon, National Association [trustee of the Teresa F. Heinz Marital Trust][trust for the spouse of John F. Kerry], Department of State]

[The divestiture property is identified in the attachment to this Certificate.]

[Please note: Upon the sale of this property, only the capital gain realized under Federal tax law is eligible for deferral under section 1043. This Certificate of Divestiture does not apply to ordinary compensation income.]

This Certificate of Divestiture is issued in accordance with section 1043 of the Internal Revenue Code and 5 C.F.R. § 2634.1002 with respect to the specific property described in the attachment. I hereby determine that the divestiture of the described property is reasonably necessary to comply with 18 U.S.C. § 208, or other applicable Federal conflict of interest statutes, regulations, rules, or executive orders.

Section 1043 of the Internal Revenue Code and the rules of 5 C.F.R. part 2634, subpart J provide for nonrecognition of gain in the case of sales to comply with conflict of interest requirements. The substantive and procedural rules relating to the tax aspects of such sales and rollovers pursuant to the statutory scheme are subject to the jurisdiction of the Internal Revenue Service. Eligible persons should seek the advice of their personal tax advisors for guidance as to the tax aspects of divestiture transactions and whether proposed acquisitions meet the requirements for permitted property. Internal Revenue Service regulations and other guidance should also be consulted as to these matters. Eligible persons must follow Internal Revenue Service requirements for reporting dispositions of property and making an election not to recognize gain under section 1043 (IRS Form 8824).

A Certificate of Divestiture may only be used if the person identified above is an "eligible person" at the time of divestiture. The rules of 5 C.F.R. part 2634, subpart J relate to the issuance of Certificates of Divestiture and the permitted property into which reinvestment must be made during the 60-day period beginning on the date of such a sale in order for nonrecognition to be permitted. Such reinvestments are called rollovers, and are limited to obligations of the United States and diversified investment funds as defined in 5 C.F.R. § 2634.1003.

DAVID APOL

David J. Apol General Counsel Digitally signed by DAVID APOL Date: 2021.03.08 15:38:59 -05'00'

Attachment

1201 NEW YORK AVE NW•SUITE 500•WASHINGTON DC•20005

ATTACHMENT CERTIFICATE NO.: OGE-2021-022

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BIOGEN IDEC INC33 PurchaseTeresa F. Heinz Marital TrustSpouseB /S WHOLESALE CLUB HOLDINGS INC59 PurchaseTeresa F. Heinz Marital TrustSpouseBLACK HILLS CORP136 PurchaseTeresa F. Heinz Marital TrustSpouseBLACKROCK INC42 PurchaseTeresa F. Heinz Marital TrustSpouseBOK FINL CORP102 PurchaseTeresa F. Heinz Marital TrustSpouseBOOKING HOLDINGS INC.10 PurchaseTeresa F. Heinz Marital TrustSpouseBOSTON BEER INC CL A25 PurchaseTeresa F. Heinz Marital TrustSpouseBOSTON SCIENTIFIC CORPORATION167 PurchaseTeresa F. Heinz Marital TrustSpouseBRIGHTHOUSE FINANCIAL, INC.62 PurchaseTeresa F. Heinz Marital TrustSpouseBRINKER INTL INC117 PurchaseTeresa F. Heinz Marital TrustSpouseBRIOMDOW INC79 PurchaseTeresa F. Heinz Marital TrustSpouseBROADCOM INC79 PurchaseTeresa F. Heinz Marital TrustSpouseBROW FORMAN CORP CL B181 PurchaseTeresa F. Heinz Marital TrustSpouseBROW FORMAN CORP CL A170 PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GAS CORP CL A170 PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GAS CORP CL A170 PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GAS CORP CL A170 PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GAS CORP CL A170 PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GA	BERKSHIRE HATHAWAY INC DEL CL B	423	Purchase	Teresa F. Heinz Marital Trust	Spouse
B J'S WHOLESALE CLUB HOLDINGS INC59 PurchaseTeresa F. Heinz Marital TrustSpouseBLACK HILLS CORP136 PurchaseTeresa F. Heinz Marital TrustSpouseBLACKROCK INC42 PurchaseTeresa F. Heinz Marital TrustSpouseBLACKROCK INC102 PurchaseTeresa F. Heinz Marital TrustSpouseBOK FINL CORP102 PurchaseTeresa F. Heinz Marital TrustSpouseBOOKING HOLDINGS INC.10 PurchaseTeresa F. Heinz Marital TrustSpouseBOSTON BEER INC CL A25 PurchaseTeresa F. Heinz Marital TrustSpouseBOSTON SCIENTIFIC CORPORATION167 PurchaseTeresa F. Heinz Marital TrustSpouseBRIGHTHOUSE FINANCIAL, INC.62 PurchaseTeresa F. Heinz Marital TrustSpouseBRINKER INTL INC117 PurchaseTeresa F. Heinz Marital TrustSpouseBRISTOL-MYERS SQUIBB COMPANY591 PurchaseTeresa F. Heinz Marital TrustSpouseBROXDOM INC79 PurchaseTeresa F. Heinz Marital TrustSpouseBROWN FORMAN CORP CL B181 PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GAS CORP CL A170 PurchaseTeresa F. Heinz Marital TrustSpouse					•
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BOOKING HOLDINGS INC.10 PurchaseTeresa F. Heinz Marital TrustSpouseBOSTON BEER INC CL A25 PurchaseTeresa F. Heinz Marital TrustSpouseBOSTON SCIENTIFIC CORPORATION167 PurchaseTeresa F. Heinz Marital TrustSpouseBRIGHTHOUSE FINANCIAL, INC.62 PurchaseTeresa F. Heinz Marital TrustSpouseBRINKER INTL INC117 PurchaseTeresa F. Heinz Marital TrustSpouseBRIODADCOM INC591 PurchaseTeresa F. Heinz Marital TrustSpouseBROADCOM INC79 PurchaseTeresa F. Heinz Marital TrustSpouseBROWN FORMAN CORP CL B181 PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GAS CORP CL A170 PurchaseTeresa F. Heinz Marital TrustSpouse					
BOSTON BEER INC CL A25PurchaseTeresa F. Heinz Marital TrustSpouseBOSTON SCIENTIFIC CORPORATION167PurchaseTeresa F. Heinz Marital TrustSpouseBRIGHTHOUSE FINANCIAL, INC.62PurchaseTeresa F. Heinz Marital TrustSpouseBRISHTHOUSE FINANCIAL, INC117PurchaseTeresa F. Heinz Marital TrustSpouseBRISTOL-MYERS SQUIBB COMPANY591PurchaseTeresa F. Heinz Marital TrustSpouseBROADCOM INC79PurchaseTeresa F. Heinz Marital TrustSpouseBROWN FORMAN CORP CL B181PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GAS CORP CL A170PurchaseTeresa F. Heinz Marital TrustSpouse					
BOSTON SCIENTIFIC CORPORATION167PurchaseTeresa F. Heinz Marital TrustSpouseBRIGHTHOUSE FINANCIAL, INC.62PurchaseTeresa F. Heinz Marital TrustSpouseBRINKER INTL INC117PurchaseTeresa F. Heinz Marital TrustSpouseBRISTOL-MYERS SQUIBB COMPANY591PurchaseTeresa F. Heinz Marital TrustSpouseBROACOM INC79PurchaseTeresa F. Heinz Marital TrustSpouseBROWN FORMAN CORP CL B181PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GAS CORP CL A170PurchaseTeresa F. Heinz Marital TrustSpouse					
BRIGHTHOUSE FINANCIAL, INC.62PurchaseTeresa F. Heinz Marital TrustSpouseBRINKER INTL INC117PurchaseTeresa F. Heinz Marital TrustSpouseBRISTOL-MYERS SQUIBB COMPANY591PurchaseTeresa F. Heinz Marital TrustSpouseBROADCOM INC79PurchaseTeresa F. Heinz Marital TrustSpouseBROWN FORMAN CORP CL B181PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GAS CORP CL A170PurchaseTeresa F. Heinz Marital TrustSpouse					
BRINKER INTL INC117PurchaseTeresa F. Heinz Marital TrustSpouseBRISTOL-MYERS SQUIBB COMPANY591PurchaseTeresa F. Heinz Marital TrustSpouseBROADCOM INC79PurchaseTeresa F. Heinz Marital TrustSpouseBROWN FORMAN CORP CL B181PurchaseTeresa F. Heinz Marital TrustSpouseCABOT OIL & GAS CORP CL A170PurchaseTeresa F. Heinz Marital TrustSpouse					•
BROADCOM INC 79 Purchase Teresa F. Heinz Marital Trust Spouse BROWN FORMAN CORP CL B 181 Purchase Teresa F. Heinz Marital Trust Spouse CABOT OIL & GAS CORP CL A 170 Purchase Teresa F. Heinz Marital Trust Spouse	BRINKER INTL INC	117	Purchase		
BROWN FORMAN CORP CL B 181 Purchase Teresa F. Heinz Marital Trust Spouse CABOT OIL & GAS CORP CL A 170 Purchase Teresa F. Heinz Marital Trust Spouse					
CABOT OIL & GAS CORP CL A 170 Purchase Teresa F. Heinz Marital Trust Spouse					
Conduct deplots of a fine of the second					
		1	i uicliase	reresd F. Heinz Widfildi Ifust	Shouse

Description of the Dresents	Quantity of Descentions Quand	Here Dresentering Associate	- Owner of the Prenerty	Deletienskin te the Frankruse
Description of the Property CAMDEN PROPERTY TRUST REIT		How Property was Acquire Purchase	ed Owner of the Property Teresa F. Heinz Marital Trust	Relationship to the Employee Spouse
CAPITAL ONE FINANCIAL CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
CARDINAL HEALTH INC	23	Purchase	Teresa F. Heinz Marital Trust	Spouse
CARLISLE COS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
CARMAX INC CARRIER GLOBAL CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
CARRIER GLOBAL CORPORATION CASEYS GENERAL STORES INC		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
CATERPILLAR INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
CATHAY GENERAL BANCORP INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
C B R E GROUP,INC.	78	Purchase	Teresa F. Heinz Marital Trust	Spouse
C D K GLOBAL INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
CERNER CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
CHAMPIONX CORP CHARTER COMMUNICATINS, INC.		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
CHENIERE ENERGY INC		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
CHIPOTLE MEXICAN GRILL INC CL A		Purchase	Teresa F. Heinz Marital Trust	Spouse
CHUBB LIMITED		Purchase	Teresa F. Heinz Marital Trust	Spouse
CHURCH & DWIGHT INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
CIGNA CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
CIMAREX ENERGY CO CINTAS CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
CINTAS CORP CISCO SYSTEMS INC		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
CITIGROUP INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
CLOROX CO		Purchase	Teresa F. Heinz Marital Trust	Spouse
CME GROUP INC	54	Purchase	Teresa F. Heinz Marital Trust	Spouse
COCA - COLA CO		Purchase	Teresa F. Heinz Marital Trust	Spouse
COGNIZANT TECHNOLOGY SOLUTIONS CORP CL		Purchase	Teresa F. Heinz Marital Trust	Spouse
COLGATE-PALMOLIVE COMPANY		Purchase	Teresa F. Heinz Marital Trust	Spouse
COMCAST CORP CL A COMERICA INC		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
CONAGRA INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
CONOCOPHILLIPS	337	Purchase	Teresa F. Heinz Marital Trust	Spouse
CONSTELLATION BRANDS INC-A	33	Purchase	Teresa F. Heinz Marital Trust	Spouse
CORNING INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
COSTAR GROUP INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
COSTCO WHSL CORP NEW COUPA SOFTWARE INCORPORATED		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse
CROWDSTRIKE HOLDINGS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse Spouse
CROWN CASTLE INTL CORP NEW		Purchase	Teresa F. Heinz Marital Trust	Spouse
CROWN HLDGS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
C S X CORP	255	Purchase	Teresa F. Heinz Marital Trust	Spouse
CULLEN FROST BANKERS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
		Purchase	Teresa F. Heinz Marital Trust	Spouse
CVS HEALTH CORPORATION DANAHER CORP		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
DEERE & CO		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
DELL TECHNOLOGIES INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
DELTA AIR LINES INC	105	Purchase	Teresa F. Heinz Marital Trust	Spouse
DIGITAL REALTY TRUST INC	67	Purchase	Teresa F. Heinz Marital Trust	Spouse
DOCUSIGN, INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
DOLLAR GENERAL CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
DOLLAR TREE INC DOMINION RES INC VA NEW		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
DOMINOS PIZZA INC COM		Purchase	Teresa F. Heinz Marital Trust	Spouse
DOUGLAS EMMETT INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
DOVER CORP	77	Purchase	Teresa F. Heinz Marital Trust	Spouse
DOW INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
D T E ENERGY CO		Purchase	Teresa F. Heinz Marital Trust	Spouse
DUKE ENERGY CORPORATION DUPONT DE NEMOURS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
DYCOM INDS INC		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
EASTMAN CHEM CO		Purchase	Teresa F. Heinz Marital Trust	Spouse
EATON CORP PLC		Purchase	Teresa F. Heinz Marital Trust	Spouse
EBAY INC	149	Purchase	Teresa F. Heinz Marital Trust	Spouse
ECOLAB INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
EDISON INTERNATIONAL		Purchase	Teresa F. Heinz Marital Trust	Spouse
EDWARDS LIFESCIENCES CORP ELANCO ANIMAL HEALTH		Purchase	Teresa F. Heinz Marital Trust	Spouse
ELECTRONIC ARTS INC		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
EMERSON ELECTRIC CO		Purchase	Teresa F. Heinz Marital Trust	Spouse
ENTERGY CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
E O G RES INC	294	Purchase	Teresa F. Heinz Marital Trust	Spouse
E Q T CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
EQUINIX, INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
EQUITY RESIDENTIAL ESSENTIAL UTILS INC USD 0.5		Purchase	Teresa F. Heinz Marital Trust	Spouse
ESSENTIAL UTILS INC USD 0.5 ESSEX PROPERTY TRUST INC REIT		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
ESTEE LAUDER COMPANIES CLASS A		Purchase	Teresa F. Heinz Marital Trust	Spouse
ETSY, INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
EVERSOURCE ENERGY	124	Purchase	Teresa F. Heinz Marital Trust	Spouse
EXELON CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
EXPEDITORS INTL WASH INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
FACEBOOK INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
FASTENAL CO FEDEX CORP		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
FIDELITY NATIONAL INFORMATION SERVICES, IN		Purchase	Teresa F. Heinz Marital Trust	Spouse
FISERV INC		Purchase	Teresa F. Heinz Marital Trust	Spouse

Description of the Property	Quantity or Porcontago Quand	How Property was Acquired	Owner of the Property	Polationship to the Employee
Description of the Property FIVE9 INC	Quantity or Percentage Owned 59	How Property was Acquired Purchase	Teresa F. Heinz Marital Trust	Relationship to the Employee Spouse
FLEETCOR TECHNOLOGIES INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
FLUOR CORP NEW	322	Purchase	Teresa F. Heinz Marital Trust	Spouse
FORD MOTOR COMPANY		Purchase	Teresa F. Heinz Marital Trust	Spouse
FORTIVE CORP.		Purchase	Teresa F. Heinz Marital Trust	Spouse
G C P APPLIED TECHNOLOGIES GENERAL DYNAMICS CORPORATION		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
GENERAL ELECTRIC COMPANY		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
GENERAL MILLS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
GENERAL MOTORS CO		Purchase	Teresa F. Heinz Marital Trust	Spouse
GILEAD SCIENCES INC	276	Purchase	Teresa F. Heinz Marital Trust	Spouse
GLOBAL PMTS INC	86	Purchase	Teresa F. Heinz Marital Trust	Spouse
GOLDMAN SACHS GROUP INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
GRAMHAM HOLDINGS COMPANY		Purchase	Teresa F. Heinz Marital Trust	Spouse
GUARDANT HEALTH INC. HANCOCK HLDG CO		Purchase	Teresa F. Heinz Marital Trust	Spouse
HARLEY DAVIDSON INC		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
HARRIS CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
HARTFORD FINL SVCS GROUP INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
H C A HOLDINGS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
HCP, INC.	308	Purchase	Teresa F. Heinz Marital Trust	Spouse
HENDERSON GROUP PLC	91	Purchase	Teresa F. Heinz Marital Trust	Spouse
HERSHEY CO		Purchase	Teresa F. Heinz Marital Trust	Spouse
HESS CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
HEWLETT PACKARD ENTERPRISE COMPANY		Purchase	Teresa F. Heinz Marital Trust	Spouse
HILTON WORLDWIDE HOLDINGS INC. HOME DEPOT INC		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
HOME DEPOTING HONEYWELL INTLINC		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
HORIZON THERAPEUTICS PUBLIC LIMITED COMP		Purchase	Teresa F. Heinz Marital Trust	Spouse
HORMEL FOODS CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
H P INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
HUMANA INC	10	Purchase	Teresa F. Heinz Marital Trust	Spouse
IAC/INTERACTIVECORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
IDACORP INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
IDEXX LABS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
IHS MARKIT LTD		Purchase	Teresa F. Heinz Marital Trust	Spouse
ILLINOIS TOOL WKS INC ILLUMINA INC		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse Spouse
INCYTE CORPORATION		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse
INGERSOLL RAND INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
INTEL CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
INTERCONTINENTALEXCHANGE GROUP, INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
INTERNATIONAL BUSINESS MACHINES CORPORA	85	Purchase	Teresa F. Heinz Marital Trust	Spouse
INTERNATIONAL FLAVORS & FRAGRANCES	25	Purchase	Teresa F. Heinz Marital Trust	Spouse
INTUITIVE SURGICAL INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
INTUIT		Purchase	Teresa F. Heinz Marital Trust	Spouse
IOVANCE BIOTHERAPEUTICS, INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
IQVIA HOLDINGS INC. IRON MOUNTAIN INCORPORATED		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
JACK IN THE BOX INC COM		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
JOHNSON CTLS INTL PLC		Purchase	Teresa F. Heinz Marital Trust	Spouse
JOHNSON & JOHNSON		Purchase	Teresa F. Heinz Marital Trust	Spouse
JP MORGAN CHASE & CO	716	Purchase	Teresa F. Heinz Marital Trust	Spouse
KANSAS CITY SOUTHERN	40	Purchase	Teresa F. Heinz Marital Trust	Spouse
KELLOGG CO		Purchase	Teresa F. Heinz Marital Trust	Spouse
KEURIG DR PEPPER INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
KEYSIGHT TECHNOLOGIES, INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
KIMBERLY CLARK CORP KINDER MORGAN INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
KROGER CO		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
LABORATORY CORP AMER HLDGS		Purchase	Teresa F. Heinz Marital Trust	Spouse
LAM RESH CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
LANCASTER COLONY CORP	15	Purchase	Teresa F. Heinz Marital Trust	Spouse
LEAR CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
LIBERTY BROADBAND		Purchase	Teresa F. Heinz Marital Trust	Spouse
		Purchase	Teresa F. Heinz Marital Trust	Spouse
LIFE STORAGE, INC. LILLY ELI & CO		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
LINDE PUBLIC LIMITED COMPANY		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
LOCKHEED MARTIN CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
LOWE'S COMPANIES INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
LULULEMON ATHLETICA INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
LYONDELLBASELL INDUSTRIES NV	59	Purchase	Teresa F. Heinz Marital Trust	Spouse
MARATHON PETROLEUM CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
MARRIOTT INTERNATIONAL INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
MARSH & MCLENNAN COS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
MASCO CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
MASTERCARD INC MATCH GROUP INC		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse Spouse
MCCORMICK & CO INC COM NON VTG COMMOI		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse
MC DONALD'S CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
MCKESSON CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
MEDICAL PROPERTIES TRUST INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
MEDNAX INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
MEDTRONIC, PLC ADR		Purchase	Teresa F. Heinz Marital Trust	Spouse
MERCK & CO INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
MERCURY GENERAL CORP	42	Purchase	Teresa F. Heinz Marital Trust	Spouse

Description of the Property	Quantity or Percentage Owned	How Property was Acquired	Owner of the Property	Relationship to the Employee
METTLER-TOLEDO INTL INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
MICRON TECHNOLOGY INC	134	Purchase	Teresa F. Heinz Marital Trust	Spouse
MICROSOFT CORPORATION	1647	Purchase	Teresa F. Heinz Marital Trust	Spouse
MID-AMERICA APARTMENT COMMUNITYS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
MODERNA INC COM		Purchase	Teresa F. Heinz Marital Trust	Spouse
MONDELEZ INTERNATIONAL MONSTER BEVERAGE CORPORATION		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
MOODYS CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
MORGAN STANLEY		Purchase	Teresa F. Heinz Marital Trust	Spouse
MORNINGSTAR INC	15	Purchase	Teresa F. Heinz Marital Trust	Spouse
MOTOROLA SOLUTIONS INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
MURPHY USA INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
NETFLIX COM INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
NEUROCRINE BIOSCIENCES INC NEWMONT MINING CORP		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
NEXTERA ENERGY INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
NIKE INC CLASS B STOCK		Purchase	Teresa F. Heinz Marital Trust	Spouse
NISOURCE INC	271	Purchase	Teresa F. Heinz Marital Trust	Spouse
NORFOLK SOUTHERN CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
NORTHERN TR CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
NORTHROP GRUMMAN CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
NRG ENERGY INC COM NEW NUCOR CORP		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
NVENT ELECTRIC PLC		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
NVIDIA CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
OGE ENERGY CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
OKTA, INC.	42	Purchase	Teresa F. Heinz Marital Trust	Spouse
OLD DOMINION FGHT LINE	41	Purchase	Teresa F. Heinz Marital Trust	Spouse
OLD REPUBLIC INTL CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
OLIN CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
OMNICOM GROUP INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
ONE GAS INC. ONEMAIN HOLDINGS, INC		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
ORACLE CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
O'REILLY AUTOMOTIVE INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
OUTFRONT MEDIA INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
PACCAR INC	97	Purchase	Teresa F. Heinz Marital Trust	Spouse
PACWEST BANCORP	86	Purchase	Teresa F. Heinz Marital Trust	Spouse
PALO ALTO NETWORKS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
PARKER HANNIFIN CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
PARK HOTELS & RESORTS INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
PATTERSON COS INC PATTERSON-UTI ENERGY INC		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
PAYCHEX INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
PAYPAL HOLDINGS, INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
PEPSICO INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
PERKINELMER INC	77	Purchase	Teresa F. Heinz Marital Trust	Spouse
PERRIGO CO PLC	40	Purchase	Teresa F. Heinz Marital Trust	Spouse
PERSPECTA INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
PFIZER INC PINTEREST. INC.		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
PINTEREST, INC. PIONEER NATURAL RESOURCES COMPANY		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
PNC FINANCIAL SERVICES GROUP		Purchase	Teresa F. Heinz Marital Trust	Spouse
POOL CORPORATION		Purchase	Teresa F. Heinz Marital Trust	Spouse
POPULAR, INC.	72	Purchase	Teresa F. Heinz Marital Trust	Spouse
P P G INDUSTRIES INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
PPL CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
PREMIER INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
PRESTIGE BRANDS HOLDINGS INC PRINCIPAL FINL GROUP INC		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
PROGRESSIVE CORP OHIO		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
PROLOGIS, INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
PRUDENTIAL FINANCIAL INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
PUBLIC STORAGE INC REIT	66	Purchase	Teresa F. Heinz Marital Trust	Spouse
PUBLIC SVC ENTERPRISE GROUP INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
PULTE HOMES INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
QUALCOMM INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
QURATE RETAIL GROUP, INC. QVC GROUP RANGE RESOURCES CORP		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
RAYTHEON TECHNOLOGIES CORP		Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
REGENCY CTRS CORP		Purchase	Teresa F. Heinz Marital Trust	Spouse
REGENERON PHARMACEUTICALS INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
REPLIGEN CORP	18	Purchase	Teresa F. Heinz Marital Trust	Spouse
REPUBLIC SVCS INC CL A		Purchase	Teresa F. Heinz Marital Trust	Spouse
RESMED INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
RINGCENTRAL, INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
ROKU INC COM CL A ROPER INDUSTRIES INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
ROSS STORES INC		Purchase Purchase	Teresa F. Heinz Marital Trust Teresa F. Heinz Marital Trust	Spouse Spouse
ROYAL CARIBBEAN CRUISES LTD		Purchase	Teresa F. Heinz Marital Trust	Spouse
ROYAL GOLD INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
RPM INTERNATIONAL INC	58	Purchase	Teresa F. Heinz Marital Trust	Spouse
SABRA HEALTH CARE REIT INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
SAGE THERAPEUTICS, INC.		Purchase	Teresa F. Heinz Marital Trust	Spouse
SALESFORCE.COM INC		Purchase	Teresa F. Heinz Marital Trust	Spouse
S B A COMMUNICATIONS CORPORATION SCHWAB CHARLES CORP NEW		Purchase Purchase	Teresa F. Heinz Marital Trust	Spouse
	427		Teresa F. Heinz Marital Trust	Spouse

Description of the Property	Quantity or Percentage Owned	How Prov	perty was Acquired	Owner of the Pro	onerty	Relations
SEALED AIR CORP NEW		Purchase	berty was Acquired	Teresa F. Heinz N		Spouse
S E I INVESTMENTS COMPANY		Purchase		Teresa F. Heinz N		Spouse
SEMPRA ENERGY	33	Purchase		Teresa F. Heinz N	Aarital Trust	Spouse
SERVICENOW, INC.		Purchase		Teresa F. Heinz N		Spouse
SHERWIN WILLIAMS CO		Purchase		Teresa F. Heinz N		Spouse
SIMON PROPERTY GROUP INC REIT SIRIUS XM HOLDINGS INC.		Purchase Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse Spouse
SIX FLAGS ENTERTAINMENT CORP		Purchase		Teresa F. Heinz N		Spouse
SKYWORKS SOLUTIONS INC		Purchase		Teresa F. Heinz N		Spouse
SLACK TECHNOLOGIES, INC.	80	Purchase		Teresa F. Heinz N	Aarital Trust	Spouse
SMUCKER J M CO		Purchase		Teresa F. Heinz N	Aarital Trust	Spouse
SONOCO PRODUCTS CO		Purchase		Teresa F. Heinz N		Spouse
SOUTHERN CO SOUTHWEST AIRLS CO		Purchase Purchase		Teresa F. Heinz N		Spouse Spouse
S & P GLOBAL INC.		Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse
SPLUNK INC.		Purchase		Teresa F. Heinz N		Spouse
SPROUTS FARMERS MARKET, INC.	113	Purchase		Teresa F. Heinz N	Aarital Trust	Spouse
SQUARE, INC.		Purchase		Teresa F. Heinz N	/larital Trust	Spouse
STANLEY BLACK & DECKER INC		Purchase		Teresa F. Heinz N		Spouse
STARBUCKS CORP		Purchase		Teresa F. Heinz N		Spouse
STARWOOD PROPERTY TRUST INC STATE STREET CORP		Purchase Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse Spouse
STRYKER CORP		Purchase		Teresa F. Heinz N		Spouse
SUN COMUNITIES INC		Purchase		Teresa F. Heinz N		Spouse
SYNCHRONY FINANCIAL	107	Purchase		Teresa F. Heinz N	/larital Trust	Spouse
SYNOPSYS INC		Purchase		Teresa F. Heinz N		Spouse
SYNOVUS FINANCIAL CORP.		Purchase		Teresa F. Heinz N		Spouse
SYSCO CORP TAKE-TWO INTERACTIVE SOFTWARE INC		Purchase Purchase		Teresa F. Heinz N		Spouse
TARGA RESOURCES CORP		Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse Spouse
TARGET CORP		Purchase		Teresa F. Heinz N		Spouse
T C F FINL CORP NEW	170	Purchase		Teresa F. Heinz N		Spouse
TELADOC INC		Purchase		Teresa F. Heinz N	Aarital Trust	Spouse
TELEPHONE AND DATA SYSTEMS, INC.		Purchase		Teresa F. Heinz N		Spouse
TESLA MOTORS INC		Purchase		Teresa F. Heinz N		Spouse
TEXAS CAPITAL BANCSHARES INC TEXAS INSTRUMENTS INC		Purchase Purchase		Teresa F. Heinz N		Spouse Spouse
THE BANK OF NEW YORK MELLON CORPORATION		Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse
THE BOEING COMPANY		Purchase		Teresa F. Heinz N		Spouse
THE KRAFT HEINZ COMPANY		Purchase		Teresa F. Heinz N		Spouse
THE PROCTER & GAMBLE COMPANY		Purchase		Teresa F. Heinz N	Aarital Trust	Spouse
THERMO FISHER SCIENTIFIC INC.		Purchase		Teresa F. Heinz N		Spouse
THE TRAVELERS COMPANIES INC		Purchase		Teresa F. Heinz N		Spouse
THE WALT DISNEY COMPANY T J X COMPANIES INC		Purchase Purchase		Teresa F. Heinz N		Spouse
T -MOBILE US, INC.		Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse Spouse
TOLL BROS INC		Purchase		Teresa F. Heinz N		Spouse
TOPBUILD CORP.		Purchase		Teresa F. Heinz N		Spouse
TRACTOR SUPPLY COMPANY	8	Purchase		Teresa F. Heinz N	Aarital Trust	Spouse
TRANE TECHNOLOGIES PUBLIC LIMITED CO		Purchase		Teresa F. Heinz N		Spouse
TRANSDIGM GROUP INC		Purchase		Teresa F. Heinz N		Spouse
TRAVEL + LEISURE CO TRI POINTE HOMES, INC.		Purchase Purchase		Teresa F. Heinz N		Spouse
T ROWE PRICE GROUP INC		Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse Spouse
TRUIST FINL CORP		Purchase		Teresa F. Heinz N		Spouse
TWILIO INC.	42	Purchase		Teresa F. Heinz N		Spouse
TWITTER, INC.		Purchase		Teresa F. Heinz N	/larital Trust	Spouse
TYSON FOODS INC CLASS A		Purchase		Teresa F. Heinz N		Spouse
UBER TECHNOLOGIES, INC. UDR INC		Purchase		Teresa F. Heinz N		Spouse
U G I CORP NEW		Purchase Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse Spouse
UNION PAC CORP		Purchase		Teresa F. Heinz N		Spouse
UNITED CONTINENTAL HOLDINGS INC		Purchase		Teresa F. Heinz N		Spouse
UNITEDHEALTH GROUP INC	209	Purchase		Teresa F. Heinz N		Spouse
UNITED PARCEL SERVICE CL B		Purchase		Teresa F. Heinz N	Aarital Trust	Spouse
UNITED STATES CELLULAR CORP		Purchase		Teresa F. Heinz N		Spouse
UNUM GROUP US BANCORP		Purchase		Teresa F. Heinz N		Spouse
VALERO ENERGY CORP NEW		Purchase Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse Spouse
VARIAN MEDICAL SYSTEMS INC N/C FROM VARIA		Purchase		Teresa F. Heinz N		Spouse
VEEVA SYSTEMS INC.		Purchase		Teresa F. Heinz N		Spouse
VENTAS INC		Purchase		Teresa F. Heinz N		Spouse
VERISIGN INC		Purchase		Teresa F. Heinz N		Spouse
VERISK ANALYTICS INC		Purchase		Teresa F. Heinz N		Spouse
VERIZON COMMUNICATIONS INC		Purchase		Teresa F. Heinz N		Spouse
VERTEX PHARMACEUTICALS INC V F CORP		Purchase Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse Spouse
VIATRIS INC		Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse
VICI PROPERTIES INC		Purchase		Teresa F. Heinz N		Spouse
VISA INC-CLASS A SHRS	327	Purchase		Teresa F. Heinz N		Spouse
VONTIER CORPORATION COM		Purchase		Teresa F. Heinz N		Spouse
VULCAN MATERIALS CO		Purchase		Teresa F. Heinz N		Spouse
WALGREENS BOOTS ALLIANCE INC		Purchase		Teresa F. Heinz N		Spouse
WASTE MANAGEMENT INC WATERS CORP		Purchase Purchase		Teresa F. Heinz N		Spouse
WATERS CORP WATSCO INC CLASS A		Purchase		Teresa F. Heinz N Teresa F. Heinz N		Spouse Spouse
WAYFAIR INC.		Purchase		Teresa F. Heinz N		Spouse
						•

Relationship to the Employee

Description of the Property	Quantity or Percentage Owned	How Property was Acquired	Owner of the Property	Relations
WEBSTER FINL CORP WATERBURY CONN	227	Purchase	Teresa F. Heinz Marital Trust	Spouse
W E C ENERGY GROUP INC	43	Purchase	Teresa F. Heinz Marital Trust	Spouse
WEINGARTEN REALTY INVESTMENT	58	Purchase	Teresa F. Heinz Marital Trust	Spouse
WELLS FARGO & COMPANY	814	Purchase	Teresa F. Heinz Marital Trust	Spouse
WELLTOWER INC.	123	Purchase	Teresa F. Heinz Marital Trust	Spouse
WESTERN UNION CO	106	Purchase	Teresa F. Heinz Marital Trust	Spouse
WEST PHARMACEUTICAL SERVICES INC N/C FROM	9	Purchase	Teresa F. Heinz Marital Trust	Spouse
WILLIAMS COS INC	176	Purchase	Teresa F. Heinz Marital Trust	Spouse
WORKDAY, INC.	68	Purchase	Teresa F. Heinz Marital Trust	Spouse
XCEL ENERGY INC	93	Purchase	Teresa F. Heinz Marital Trust	Spouse
XILINX INC	135	Purchase	Teresa F. Heinz Marital Trust	Spouse
YUM! BRANDS INC	173	Purchase	Teresa F. Heinz Marital Trust	Spouse
ZILLOW GROUP, INC.	50	Purchase	Teresa F. Heinz Marital Trust	Spouse
ZIMMER HOLDINGS INC	52	Purchase	Teresa F. Heinz Marital Trust	Spouse
ZIONS BANCORPORATION	312	Purchase	Teresa F. Heinz Marital Trust	Spouse
ZOETIS INC	108	Purchase	Teresa F. Heinz Marital Trust	Spouse
ZOOM VIDEO COMMUNICATIONS, INC.	39	Purchase	Teresa F. Heinz Marital Trust	Spouse
ZSCALER,INC.	20	Purchase	Teresa F. Heinz Marital Trust	Spouse

Relationship to the Employee

Relation Spouse Spouse



AIMS Agency Information Management System

Trends

My Dashboard

New Interaction N

New Outreach

Search

Agencies

Administration

Resolved Interaction

	Interaction Number: 21182
	copy press contact to new
Initiation Date*:	2021-02-10
Title*:	Question about individual's financial disclosure (Fox News)
Question*:	Hi Elizabeth, I have a couple quick questions that I was hoping you could help me out with: is John Kerry required to file a financial disclosure for his position as special presidential envoy? If yes, how soon does he have to file one? If not, does he have an exemp ion from filing requirements?
	Thanks so much for any insights you can offer!
	Peter Hasson
Update:	
Categories*:	278s
Origin Of Interaction*:	Email
Source*:	Non-Agency Press
First Name:	Peter
Last Name:	Hasson
Title:	Reporter, Fox News
Position:	
Email:	(b) (6)
Phone:	(b) (6)
Other Contact Notes:	
Assignment:	Elizabeth D. Horton
Watching:	
Temporary Notes:	
created by:	Elizabeth D. Horton

	Resolution Information
Resolution Date*:	2021-02-10
Resolution Category*:	Resolved
Response*:	I told the reporter hat I do not discuss specific individuals but helped the reporter navigate to he Officials' Individual Disclosures Search Collection and told him that he could filter by agency. I also told him that he could contact the employing agency and referred him to the Agency Ethics Program Contact Information page. (Assigned to: Elizabeth D. Horton)
Complexity (level):	1 [Click to view/hide complexity guidelines]
Time Spent (hours):	0-1 hour
Contributor:	
reopen	

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Interaction History Log		
Closed	02/10/2021 06:51:17 PM by Elizabeth D. Horton	
Create	02/10/2021 02:11:36 PM by Elizabeth D. Horton	
Now Assigned: Elizabeth D. Horton	02/10/2021 02:11:36 PM by Elizabeth D. Horton	

Division(s) assigned: PCD



AIMS Agency Information Management System

Trends

My Dashboard

New Interaction New

New Outreach

Search

Agencies

Administration

Resolved Interaction

	Interaction Number: 21449
	copy press contact to new
Initiation Date*:	2021-03-30
Title*:	Question about individual's financial disclosure report (CNBC)
Question*:	The reporter had ques ions about obtaining the financial disclosure report for John Kerry.
Update:	
Categories*:	278s
Origin Of Interaction*:	Phone
Source*:	Non-Agency Press
First Name:	Brian
Last Name:	Schwartz
Title:	Reporter, CNBC
Position:	
Email:	(b) (6)
Phone:	(b) (6) (c): (b) (6)
Other Contact Notes:	
Assignment:	Elizabeth D. Horton
Watching:	
Temporary Notes:	
created by:	Elizabeth D. Horton

	Resolution Information		
Resolution Date*:	2021-03-31		
Resolution Category*:	Resolved		
Response*:	After re-processing the request via the 201 system, the reporter indicated that he still had not received the report so Lori resent it via email. (Assigned to: Elizabeth D. Horton)		
Complexity (level):	1 [Click to view/hide complexity guidelines]		
Time Spent (hours):	1-4 hours		
Contributor:	Lori Kelly		
reopen			

	Interaction History Log
Closed	04/02/2021 10:54:44 AM by Elizabeth D. Horton
Create	03/30/2021 12:54:42 PM by Elizabeth D. Horton

5/3/2021

Now Assigned: Elizabeth D. Horton

Division(s) assigned: PCD

03/30/2021 12:54:42 PM by Elizabeth D. Horton



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New Outreach

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Agencies

Administration

Resolved Interaction

	Interaction Number: 21520
	copy press contact to ne
Initiation Date*:	2021-04-12
Title*:	Question about individual's financial disclosure reports (ABC News)
Question*:	Hi Elizabeth, Soorin with ABC News. I'm reaching out to see if and when John Kerry's financial disclosure form will be released through the OGI I've reached out to the State Department in the hopes of the department releasing them but I was told that the OGE will release the filing. Any guidance on when it will come out? And what is causing the delay in the release?
	I always appreciate your help.
Update:	
Categories*:	278s
Origin Of Interaction*:	Email
Source*:	Non-Agency Press
First Name:	Soorin
Last Name:	Kim
Title:	Reporter, ABC News
Position:	
Email:	(b) (6)
Phone:	(b) (6) ; c: (b) (6)
Other Contact Notes:	
Assignment:	Elizabeth D. Horton
Watching:	
Temporary Notes:	
created by:	Elizabeth D. Horton

Resolution Information	
Resolution Date*:	2021-04-15
Resolution Category*:	Resolved
Response*:	I left a voicemail message on 4/12 asking her to call me back if she still had questions. On 4/15, I told the reporter hat I do not discuss specific individuals and explained on background that OGE reviews a very small fraction of public financial disclosure reports (highest level officials like heads of agencies and some WH officials). I also explained that even for reports that do come to OGE, employing agencies must provide public financial disclosure reports if they've had them more than 30 days. I told her off the record that this report will not come to OGE. When she asked about obtaining the official's ethics agreement, I explained that OGE only has ethics agreements for presidentially-appointed, Senate-confirmed posi ions and that non-PAS officials commonly don't have ethics agreements. (Assigned to: Elizabeth D. Horton)
Complexity (level):	2 [Click to view/hide complexity guidelines]
Time Spent (hours):	0-1 hour
Contributor:	
5) internal agency network	

reopen

Interaction History Log		
Closed	04/15/2021 03:31:57 PM by Elizabeth D. Horton	
Create	04/12/2021 02:52:10 PM by Elizabeth D. Horton	
Now Assigned: Elizabeth D. Horton	04/12/2021 02:52:10 PM by Elizabeth D. Horton	

Division(s) assigned: PCD



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Agencies

Administration

Resolved Interaction

Interaction Number: 21067		
	copy press contact to new	
Initiation Date*:	2021-01-27	
Title*:	Question about individual's financial disclosure reports (CBS)	
Question*:	Hello!	
	I'm wondering if OGE has any 2020 or 2021 filings for John Kerry I am unsure given his position as a special envoy if his filings would be public.	
	Thank you!	
Update:		
Categories*:	278s	
Origin Of Interaction*:	Email	
Source*:	Non-Agency Press	
First Name:	Katie	
Last Name:	Watson	
Title:	White House Reporter, CBS News	
Position:		
Email:	(b) (6)	
Phone:	(b) (6) (c); (b) (6) (w)	
Other Contact Notes:		
Assignment:	Elizabeth D. Horton	
Watching:		
Temporary Notes:		
created by:	Elizabeth D. Horton	

Resolution Information		
Resolution Date*:	2021-01-27	
Resolution Category*:	Resolved	
Response*:	I told the reporter hat I do not discuss specific individuals but told her that OGE only reviews a fraction of public financial disclosure reports while the majority of reports can be obtained from employing agencies. I referred her to the workbook with a list of PAS posi ions subject to OGE's review and the Agency Ethics Program Contact List on OGE's website. (Assigned to: Elizabeth D. Horton)	
Complexity (level):	1 [Click to view/hide complexity guidelines]	
Time Spent (hours):	0-1 hour	
Contributor:		
reopen		

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	Interaction History Log
Closed	01/27/2021 05:42:02 PM by Elizabeth D. Horton
Now Assigned: Elizabeth D. Horton	01/27/2021 05:42:02 PM by Elizabeth D. Horton

Division(s) assigned: PCD