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Financial Disclosure Statement 2023

Attachment(s)

Submitted by: Melanie May

Item 5: I held the following interests in 2023 (Amount)

Individual Stocks:

Microsoft (E)

Mutual Funds:

Invesco International Bond Fund (B)

Invesco Discovery Mid Cap Growth Fund (C)

Amcap Fund (E)

Davis New York Venture Fund (D)

JP Morgan Mid Cap Value Fund (E)

Aquila Hawaiian Tax Free Trust (C)

American Funds New World Fund (C)

PIMCO Total Return Fund (B)

PIMCO Long Term US Government Fund (C)

Washington Mutual Investors (E)

Mutual/Bond Funds in Retirement Accounts:

AMG River Road Mid Cap (F)

Gabelli Equity Income Fund (F)

Hartford Schroders Emerging Market Equity (C)

Schwab Select Large Cap (G)

Manning & Napier Overseas Series (E)

Schwab S&P 500 Index Fund (G)

Teton Westwood Mighty Westwood Mites (F)

PIMCO Total Return (E)

Champlain Mid Cap Fund (B)

GQG Partners Emerging Markets Equity Fund (B)

American Mutual Fund (C)

Dodge & Cox Income Fund (B)

American Funds Europacific Growth Fund (B)

Loomis Sayles Growth Fund (C)

Nuance Mid Cap Value Fund (B)

Metropolitan West Total Return Bond Fund (C)

PGIM High Yield Fund (B)

T. Rowe Price Small Cap Value Fund (B)

Blackrock US Bond Index Fund (D)

Blackrock Total Return Bond Fund (D)

Blackrock US Large Cap Index (F)

Mainstay Large Cap Growth (F)

Wellington CIFI Trust Research (E)

Blackrock US Small/Mid Cap Ind (D)

William Blair Sm Mid Cap Gwth (D)

American Fd Europacific Gro R6 (D)

Blackrock Non-US Equity Index (D)

My husband held the following interests in 2023 (Amount)

529 Account for benefit of child:

AMCAP Fund (E)
American Balanced Fund (D)
The Bond Fund of America (D)
Capital World Bond Fund (C)
Europacific Growth Fund (D)
Intermediate Bond Fund of America (D)
SMALLCAP World Fund (D)
Washington Mutual Investors Fund (E)

Mutual/Bond Funds in Retirement Accounts:

Champlain Mid Cap Fund (C)
CQG Partners Emerging Markets Equity Fund (B)
American Mutual Fund (C)
Dodge & Cox Income Fund (B)
American Funds Europacific Growth Fund (B)
Loomis Sayles Growth Fund (C)
Nuance Mid Cap Value Fund (B)
Metropolitan West Total Return Bond Fund (C)
PGIM High Yield Fund (B)
T. Rowe Price Small Cap Value Fund (B)
Thrift Savings Plan G Fund (E)
Thrift Savings Plan F Fund (E)
Thrift Savings Plan C Fund (I)
Thrift Savings Plan S Fund (H)
Thrift Savings Plan I Fund (G)