



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Amy Kennedy
Status: Congressional Candidate
State/District: NJ02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
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Period Covered: 01/01/2019– 04/30/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
133 Oakcrest LLC ⇒ Rental Property [RP] LOCATION: Northfield, NJ, US		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
529 Plan #1 ⇒ Fidelity NH Moderate Growth Portfolio [MF]	DC	\$100,001 - \$250,000	Tax-Deferred		
529 Plan #2 ⇒ Fidelity NH Moderate Growth Portfolio [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		
529 Plan #3 ⇒ Fidelity NH Moderate Growth Portfolio [MF]	DC	\$100,001 - \$250,000	Tax-Deferred		
529 Plan #4 ⇒ Fidelity NH Moderate Growth Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
529 Plan #5 ⇒ Fidelity NH Moderate Growth Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
AK Educational Consulting LLC [OL]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Brigantine, NJ, US DESCRIPTION: Educational Consulting					
Amalgamated Bank Accts [BA]	JT	\$500,001 - \$1,000,000	Interest	\$201 - \$1,000	None
Amy Kennedy for Congress - Campaign Loan [DO]		\$100,001 - \$250,000	None		
Ascensus Roth IRA ⇒ APGAX - AB Large Cap Growth A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Bank of America Acct [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	Not Applicable
Citibank Accts [BA]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	\$201 - \$1,000
Citizens Bank Acct [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	None
Citizens Bank Accts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Clam Diggers Snow'd Inn Inc [OL]		\$1,001 - \$15,000	None		
LOCATION: Egg Harbro, NJ, US DESCRIPTION: S Corp holding Rental Property					
Equi-Vest TSA ⇒ 1290 VT Gamco Small Co Val [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equi-Vest TSA ⇒ EQ/BlackRock Basic Value Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equi-Vest TSA ⇒ EQ/Equity 500 Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equi-Vest TSA ⇒ EQ/Fidelity Institutional AM Lge [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equi-Vest TSA ⇒ EQ/International Managed Vol [MF]		\$15,001 - \$50,000	Tax-Deferred		
Equi-Vest TSA ⇒ EQ/Janus Enterprise [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Equi-Vest TSA ⇒ EQ/Mid Cap Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equi-Vest TSA ⇒ EQ/Small Company Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Equi-Vest TSA ⇒ EquiVest Guaranteed Interest Account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Family Trust #1 ⇒ Arctic Royalty LP [OL] LOCATION: Tulsa, OK, US DESCRIPTION: Royalties from Mineral Rights	SP	\$100,001 - \$250,000	Net Operating Income	\$5,001 - \$15,000	\$15,001 - \$50,000
Family Trust #1 ⇒ Braeburn Pharmaceuticals Inc [PS] DESCRIPTION: Medically Assisted Treatment of Opioid Use Disorder, Plymouth Meeting, PA	SP	\$250,001 - \$500,000	None		
Family Trust #1 ⇒ Citizens Checking Acct [BA]	SP	\$100,001 - \$250,000	Interest	\$1 - \$200	None
Family Trust #1 ⇒ Citizens MM Acct [BA]	SP	\$100,001 - \$250,000	Interest	\$1 - \$200	None
Family Trust #1 ⇒ Clean Slate Centers Inc [PS] DESCRIPTION: Addiction Treatment Centers, Nashville, TN	SP	\$100,001 - \$250,000	None		
Family Trust #1 ⇒ CPF Recovery Ways Holdings, LLC [PS] DESCRIPTION: Addiction Treatment Center, Salt Lake City, UT	SP	\$15,001 - \$50,000	None		
Family Trust #1 ⇒ DynamCare Health [PS] DESCRIPTION: Technology for Substance Use Recovery, Boston, MA	SP	\$100,001 - \$250,000	None		
Family Trust #1 ⇒ InnovaTel, LLC [PS] DESCRIPTION: Telepsychiatry, Pittsburgh, PA	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Agency Inc [OL] LOCATION: New York, NY, US	SP	\$50,001 - \$100,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Family Office Services					
Family Trust #1 ⇒ Park Realty Holdings Illinois [RE]	SP	\$15,001 - \$50,000	None		
Family Trust #1 ⇒ Pear Therapeutics Inc [PS]	SP	\$250,001 - \$500,000	None		
DESCRIPTION: Prescription Digital Therapeutics, Cambridge, MA					
Family Trust #1 ⇒ Psych Hub, LLC [PS]	SP	\$1,000,001 - \$5,000,000	None		
DESCRIPTION: Online Education for Mental Health, Addiction & Suicide, Nashville, TN					
Family Trust #1 ⇒ Quartet Health Inc [PS]	SP	\$500,001 - \$1,000,000	None		
DESCRIPTION: Mental Health Technology, New York, NY					
Family Trust #1 ⇒ Wolf Point Owners LLC [OL]	SP	\$1,000,001 - \$5,000,000	Interest, Distribution of Net Income, Rent	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
LOCATION: Chicago, IL, US DESCRIPTION: Real Estate Development					
Family Trust #1 ⇒ DD LLC ⇒ Clear Health Partners LLC ⇒ Clear Health Quality Institute LLC [PS]	SP	\$250,001 - \$500,000	None		
DESCRIPTION: Accreditation Services, Annapolis, MD					
Family Trust #1 ⇒ Fidelity SEP-IRA ⇒ Fidelity Government Money Market [IH]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ FK Ventures VII LLC ⇒ Neuromotion, Inc [PS]	SP	\$50,001 - \$100,000	None		
DESCRIPTION: Mental Health Technology, Boston, MA					
Family Trust #1 ⇒ HPS Holdings LLC ⇒ HealthPointe Solutions, Inc [PS]	SP	\$250,001 - \$500,000	None		
DESCRIPTION: Health Care Technology, Austin, TX					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Amansa Fund, LP [HE]	SP	\$15,001 - \$50,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒	SP	\$100,001 -	Capital Gains,	\$1,001 -	\$15,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DODWX-Dodge & Cox Global Stock Fund [EF]		\$250,000	Dividends, Interest	\$2,500	\$50,000
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ HCP China Capital Appreciation Fund LP [HE]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ HCP Private Equity Fund VII, LP [HE]	SP	\$15,001 - \$50,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ HCP Private Equity Fund VIII, LP [HE]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Lone Cascade, LP (EIF) [HE]	SP	\$100,001 - \$250,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Northern Funds US Govt MM #1 [BA]	SP	\$15,001 - \$50,000	Dividends, Interest	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Velt Partners Fund, LLC (EIF) [HE]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Westwood Emerging Markets Fund, LLC [HE]	SP	\$15,001 - \$50,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Buena Vista Asian Opportunity Fund ⇒ AAVAS Financiers (AAVAS.NS) [OT]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Trades on NSE (India Stock Exchange) as AAVAS.NS					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Buena Vista Asian Opportunity Fund ⇒ Bandhan Bank Ltd [OT]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Trades on India Stock Exchange as BANDHANBNK.NS					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Buena Vista Asian Opportunity Fund ⇒ China Life Ins Co Ltd Shares H [OT]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Trades on Hong Kong Exchange as 2628					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Buena Vista Asian Opportunity Fund ⇒	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
China Maple Leaf Educational Systems Limited [OT]					
DESCRIPTION: Trades on Hong Kong Exchange as 1317					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Buena Vista Asian Opportunity Fund ⇒ China YuHua Education Corporation Limited (6169.HK) [PS]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Trades on Hong Kong Exchange as 6169					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Buena Vista Asian Opportunity Fund ⇒ Goldman Sachs US Treasury Liquid Reserves Fund [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Buena Vista Asian Opportunity Fund ⇒ Philippine Seven Corp [OT]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
DESCRIPTION: Trades on Philippine Exchange as SEVN					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Buena Vista Asian Opportunity Fund ⇒ Sun Art Retail HK [HE]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Trades on Hong Kong Exchange as 6808					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Buena Vista Asian Opportunity Fund ⇒ Vipshop Holdings Limited American Depository Shares, each representing two ordinary shares (VIPS) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ A.O. Smith Corporation (AOS) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Acuity Brands, Inc. (AYI) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Adidas AG (ADS.DE) [OT]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
DESCRIPTION: Trades on XETRA (German Exchange) as ADS.DE					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Analog Devices, Inc. (ADI) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Applied Materials, Inc. (AMAT) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Aptiv PLC Ordinary Shares (APTV) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Baxter International Inc. (BAX) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Becton, Dickinson and Company (BDX) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Cash Receivable #1 [DO]	SP	\$15,001 - \$50,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ CBRE Group Inc Common Stock Class A (CBRE) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Cerner Corporation (CERN) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Charles Schwab Corporation (SCHW) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Cognizant Technology Solutions Corporation - Class A (CTSH) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ CSL Ltd (CSL.AX) [OT]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Trades on Australia Exchange as CSL.AX					

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Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ DENTSPLY SIRONA Inc. (XRAY) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Equifax, Inc. (EFX) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Gartner, Inc. (IT) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Generation IM Cash #1 [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Henry Schein, Inc. (HSIC) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Illumina, Inc. (ILMN) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ IndusInd bank Ltd (INDUSINDBNK.NS) [OT] DESCRIPTION: Traded on NSE (India Exchange) as INDUSINDBNK.NS	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Informa plc (INF.L) [OT] DESCRIPTION: Traded on London Exchange as INF.L	SP	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Jones Lang LaSalle Incorporated (JLL) [ST]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Kingspan Group plc (KRX.IR) [OT] DESCRIPTION: Trades on Dublin Ireland Exchange as KRX.IR	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Legrand SA (LR.PA) [OT]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Trades on Paris Exchange as LR.PA					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ MercadoLibre, Inc. (MELI) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Nutanix, Inc. - Class A (NTNX) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Ocado Group plc (OCDO.L) [OT]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Trades on London Exchange as OCDO.L					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Penumbra, Inc. (PEN) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Recruit Holdings Co, Ltd (6098.T) [OT]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Traded on Tokyo Exchange as 6098.T					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Salesforce.com Inc (CRM) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Sensata Technologies Holding plc Ordinary Shares (ST) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Stericycle, Inc. (SRCL) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

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Taiwan Semiconductor (2330.TW) [OT]					
DESCRIPTION: Trades on Taiwan Exchange as 2330.TW					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ TE Connectivity Ltd. New Switzerland Registered Shares (TEL) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Texas Instruments Incorporated (TXN) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ The Cooper Companies, Inc. (COO) [ST]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Thermo Fisher Scientific Inc (TMO) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Trane Technologies plc (TT) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Trimble Inc. (TRMB) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Unilever NV (UNA.AS) [OT]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Trades on Amsterdam Exchange as UNA.AS					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Varian Medical Systems, Inc. (VAR) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC ⇒ Workday, Inc. - Class A (WDAY) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒	SP	\$1,001 - \$15,000	Capital Gains,	None	\$1 - \$200

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McDonald Capital Investors, Inc ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]			Dividends		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Brookfield Asset Management Inc. (BAM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Comcast Corporation - Class A (CMCSA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Ecolab Inc. (ECL) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Expeditors International of Washington, Inc. (EXPD) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Fastenal Company (FAST) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ JP Morgan Chase & Co. (JPM) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Martin Marietta Materials, Inc. (MLM) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Nike, Inc. (NKE) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Northern Trust Cash Acct #1 [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Paychex, Inc. (PAYX) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000

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Progressive Corporation (PGR) [ST]					
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Regeneron Pharmaceuticals, Inc. (REGN) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Roper Technologies, Inc. (ROP) [ST]	SP	None	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Union Pacific Corporation (UNP) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc ⇒ Wells Fargo & Company (WFC) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ CHICAGO ILL MET WTR RECLAMATION DIST GTRCHICAGO 5% 12-01-2023 BEO-167560SS1 [GS]	SP	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ CONNECTICUT ST SER B 5 DUE 05-15-2023 REG-20772JBP6 [GS]	SP	\$1 - \$1,000	Interest	None	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ DAWSON RIDGE MET DIST NO 1 COLO ZERO CPN-REF-SER A DUE 10-01-2022 REG ETM-239427AG2 [GS]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ ILLINOIS FIN AUTH REV 5% 08-15-2021 BEO-45200FV97 [GS]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ METROPOLITAN TRANSN AUTH N Y REV 5% 09-01-2021 BEO-59261AXD4 [GS]	SP	\$1 - \$1,000	Interest	None	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ METROPOLITAN TRANSN AUTH N Y REV BD ANTIC NTS-SER E 4% DUE 09-01-2020 BEO-59261AA98 [GS]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ NEW YORK N Y 5.0% DUE 08-01-2019 BEO [GS]	SP	None	Capital Gains, Interest	Not Applicable	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ NEW YORK N Y CITY MUN WTR FIN AUTH WTR &SWR SYS REV 5.0% DUE 06-15-2027 /o [GS]	SP	None	Interest	Not Applicable	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ NEW YORK ST URBAN DEV CORP REV 5.0% DUE 03-15-2022 BEO [GS]	SP	None	Capital Gains, Interest	Not Applicable	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ Northern Funds US Govt MM #2 [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ PENNSYLVANIA ST TPK COMMN OIL FRANCHISE TAX REV 5% 12-01-2023 BEO-709221US2 [GS]	SP	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ PENNSYLVANIA ST TPK COMMN TPK REV FLTG RT 3.02% 12-01-2021 BEO-709224EF2 [GS]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ SAN ANTONIO TEX WTR REV RMRKTD 2.625% 05-01-2049 BEO-79642GCG5 [GS]	SP	\$1,001 - \$15,000	Interest	None	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ ST CLOUD MINN HEALTH CARE REV 5.125% 05-01-2030 BEO-78916VDE7 [GS]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ UNITED STATES TREAS BILLS 0% 04-16-2020-912796TRo [GS]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Fixed Income #1 ⇒ UNITED STATES TREAS NTS DTD /31/2019 2.125% DUE 05-31-2021 REG-9128286V7 [GS]	SP	\$1,001 - \$15,000	Interest	None	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ American Steadfast LP [HE]	SP	\$100,001 - \$250,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Centerbridge Special Cr 2 LP [HE]	SP	\$1,001 - \$15,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Davidson Kempner Distressed Opp Fund LP [HE]	SP	\$50,001 - \$100,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Davidson Kempner Partners Fund [HE]	SP	\$100,001 - \$250,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Empyrean Capital Fund [HE]	SP	\$50,001 - \$100,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Fir Tree Value Fund (EIF) [HE]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Luxor Capital Partners LP (EIF) [HE]	SP	\$100,001 - \$250,000	None		
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Mount Kellett Cap Part II LP [HE]	SP	\$1,001 - \$15,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Northern Funds US Govt MM #3 [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Taconic Opportunity Fund II LP [HE]	SP	\$100,001 - \$250,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Tybourne Equity (US) Fund [HE]	SP	\$100,001 - \$250,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Hedge #1 ⇒ Varde Investment Partners LP [HE]	SP	\$100,001 - \$250,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #1 ⇒ Park Holdings - Private Equity ⇒ Deutsche Banc Special Opps Fund [HE]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Park Holdings - Private Equity ⇒ Northern Funds US Govt MM #4 [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Park Holdings - Private Equity ⇒ Rockefeller Access Fund I LLC [HE]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ American Electric Power Company, Inc. (AEP) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ American Water Works Company, Inc. (AWK) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Amgen Inc. (AMGN) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Analog Devices, Inc. (ADI) [ST]	SP	None	Capital Gains, Dividends	None	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Apple Inc. (AAPL) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Arthur J. Gallagher & Co. (AJG) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ AT&T Inc. (T) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Avery Dennison Corporation (AVY) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Bank of America Corporation (BAC) [ST]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ BB&T Corporation (BBT) [ST]	SP	None	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Best Buy Co., Inc. (BBY) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Blackrock High Yield Municipal K [MF]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Blackrock Strategic Muni Opps K [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Boeing Company (BA) [ST]	SP	None	Capital Gains, Dividends	None	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Caterpillar, Inc. (CAT) [ST]	SP	None	Capital Gains, Dividends	None	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Celanese Corporation Celanese Corporation (CE) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Chevron Corporation (CVX) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Cisco Systems, Inc. (CSCO) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Citigroup, Inc. (C) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ CMS Energy Corporation (CMS) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Coca-Cola Company (KO) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Comcast Corporation - Class A (CMCSA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ CVS Health Corporation (CVS) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Dreyfus Prime MM Fund A #6346 [BA]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Eli Lilly and Company (LLY) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Emerson Electric Company (EMR) [ST]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Fidelity Intermediate Municipal Income [MF]	SP	\$50,001 - \$100,000	Dividends, Interest	\$201 - \$1,000	Not Applicable
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Fidelity Limited Term Muni Inc [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Fidelity Municipal Tr SPR Sh Tm Muni Inc [MF]	SP	None	Capital Gains, Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Hanover MA 4.000% 9/01/2021 [GS]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Home Depot, Inc. (HD) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Honeywell International Inc. (HON) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Intel Corporation (INTC) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ International Paper Company (IP) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ iShares Core S&P Mid-Cap ETF [EF]	SP	\$50,001 - \$100,000	Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ iShares Global REIT ETF [EF]	SP	None	Capital Gains, Dividends	None	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ iShares Russell 2000 ETF [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ iShares S&P 500 Growth ETF [EF]	SP	\$50,001 - \$100,000	Dividends	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ iShares Select Dividend ETF [EF]	SP	None	Capital Gains	Not Applicable	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Johnson & Johnson (JNJ) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ JP Morgan Chase & Co. (JPM) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Kimberly-Clark Corporation (KMB) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Lamar Advertising Company - Class A (LAMR) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒	SP	\$1,001 - \$15,000	Capital Gains,	\$1 - \$200	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Lockheed Martin Corporation (LMT) [ST]			Dividends		\$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Massachusetts Bay Transn Auth Rev 5.000% 7/01/2023 [GS]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Massachusetts St Dev Fin Agy 5.000% 10/15/2020 [GS]	SP	None	Capital Gains, Interest	Not Applicable	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Massachusetts St Dev Fin AgyREV 5.000% 4/01/2031 [GS]	SP	None	Capital Gains, Interest	Not Applicable	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Massachusetts ST Transprtn Fund Rev 5.000% 6/01/2022 [GS]	SP	\$15,001 - \$50,000	Interest	None	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ McDonald's Corporation (MCD) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Morgan Stanley (MS) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ North Attleborough MA 2.000% 5/15/2019 [GS]	SP	None	Interest	Not Applicable	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ ONEOK, Inc. (OKE) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Paychex, Inc. (PAYX) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Phillips 66 (PSX) [ST]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ PNC Financial Services Group, Inc. (PNC) [ST]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Procter & Gamble Company (PG) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Public Storage (PSA) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Royal Dutch Shell PLC Royal Dutch Shell PLC American Depositary Shares (RDS.B) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Texas Instruments Incorporated (TXN) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ The Travelers Companies, Inc. (TRV) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Truist Financial Corporation (TFC) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	Not Applicable
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Vanguard Real Estate ETF [EF]	SP	\$1,001 - \$15,000	None		
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Verizon Communications Inc. (VZ) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #1 ⇒ Peoples United Brokerage Acct ⇒ Waste Management, Inc. (WM) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ Amansa Fund LP [HE]	SP	\$1,001 - \$15,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ DODWX-Dodge & Cox Global Stock Fund [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ HCP China Capital Appreciation Fund LP [HE]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ HCP Private Equity Fund VII LP [HE]	SP	\$1,001 - \$15,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ Lone Cascade LP (EIF) [HE]	SP	\$15,001 - \$50,000	None		
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ Northern Funds US Govt MM #5 [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ Velt Partners Fund LLC (EIF) [HE]	SP	\$1,001 - \$15,000	None		
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ Westwood Emerging Markets Fund LLC [HE]	SP	\$1,001 - \$15,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ Generation IM Global Equity Fund, LLC ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ Generation IM Global Equity Fund, LLC ⇒ Baxter International Inc. (BAX) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ Generation IM Global Equity Fund, LLC ⇒ Cash Receivable #2 [DO]	SP	\$1,001 - \$15,000	None		
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ Generation IM Global Equity Fund, LLC ⇒ Charles Schwab Corporation (SCHW) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ McDonald Capital Investors, Inc #2 ⇒ Ecolab Inc. (ECL) [ST]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ McDonald Capital Investors, Inc #2 ⇒ Fastenal Company (FAST) [ST]	SP	\$1,001 - \$15,000	None		
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ McDonald Capital Investors, Inc #2 ⇒ Paychex, Inc. (PAYX) [ST]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ McDonald Capital Investors, Inc #2 ⇒ Progressive Corporation (PGR) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Family Trust #2 ⇒ Park Holdings - Fixed Income #2 ⇒ Northern Funds US Govt MM #6 [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Family Trust #3 ⇒ Northern Trust Checking Acct [BA]	SP	\$1,000,001 - \$5,000,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Family Trust #3 ⇒ Wolf Point Owners LLC [RE]	SP	\$1,000,001 - \$5,000,000	Interest, Distribution of Income, Rent	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
Family Trust #3 ⇒ WPW Funds Receivable [DO]	SP	\$50,001 - \$100,000	None		
Family Trust #3 ⇒ Park Holdings - Equity #3 ⇒ Amansa Fund LP [HE] COMMENTS: Fund manager letter on file with Committee on Ethics	SP	\$1,001 - \$15,000	None		
Family Trust #3 ⇒ Park Holdings - Equity #3 ⇒ DODWX-Dodge & Cox Global Stock FUND [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$5,001 - \$15,000
Family Trust #3 ⇒ Park Holdings - Equity #3 ⇒ HCP China Capital Appreciation Fund LP [HE] COMMENTS: Fund manager letter on file with Committee on Ethics	SP	\$1,001 - \$15,000	None		
Family Trust #3 ⇒ Park Holdings - Equity #3 ⇒ HCP Private Equity Fund VII LP [HE] COMMENTS: Fund manager letter on file with Committee on Ethics	SP	\$1,001 - \$15,000	None		
Family Trust #3 ⇒ Park Holdings - Equity #3 ⇒ Lone Cascade LP (EIF) [HE]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Family Trust #3 ⇒ Park Holdings - Equity #3 ⇒ Northern Funds US Govt MM #7 [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Family Trust #3 ⇒ Park Holdings - Equity #3 ⇒ Velt Partners Fund LLC (EIF) [HE]	SP	\$1,001 - \$15,000	None		
Family Trust #3 ⇒ Park Holdings - Equity #3 ⇒ Westwood Emerging Markets Fund LLC [HE]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #3 ⇒ Park Holdings - Equity #3 ⇒ Buena Vista Asian Opportunity Fund ⇒ Cash Receivable #3 [DO]	SP	\$1,001 - \$15,000	None		
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ American Steadfast LP [HE]	SP	\$15,001 - \$50,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ Centerbridge Special Cr 2 LP [HE]	SP	\$1,001 - \$15,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ Davidson Kempner Distressed Opp Fund LP [HE]	SP	\$1,001 - \$15,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ Davidson Kempner Partners Fund [HE]	SP	\$15,001 - \$50,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ Empyrean Capital Fund [HE]	SP	\$15,001 - \$50,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ Fir Tree Value Fund (EIF) [HE]	SP	\$1,001 - \$15,000	None		
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ Luxor Capital Partners LP (EIF) [HE]	SP	\$15,001 - \$50,000	None		
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ Mount Kellett Cap Part II LP [HE]	SP	\$1,001 - \$15,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ Northern Funds US Govt MM #8 [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ Taconic Opportunity Fund II LP [HE]	SP	\$15,001 - \$50,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒	SP	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Tybourne Equity (US) Fund [HE]					
COMMENTS: Fund manager letter on file with Committee on Ethics					
Family Trust #3 ⇒ Park Holdings - Hedge #3 ⇒ Varde Investment Partners LP [HE]	SP	\$15,001 - \$50,000	None		
COMMENTS: Fund manager letter on file with Committee on Ethics					
Fidelity SEP-IRA ⇒ Citibank Insured Deposit [IH]	SP	\$100,001 - \$250,000	Tax-Deferred		
Knights of Columbus Life Insurance Policy [WU]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Lincoln Investment RTHIRA-RSP ⇒ ICON Fund S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lincoln Investment RTHIRA-RSP ⇒ Invesco International Growth Fund A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lincoln Investment 403B-RS ⇒ ICON International Equity Fund A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lincoln Investment 403B-RS ⇒ Invesco Government MMrkt Fund-Cash Reserve Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		
Lincoln Investment 403B-RSP ⇒ Invesco Core Plus Bond Fund A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lincoln Investment 403B-RSP ⇒ Invesco Growth & Income Fund A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lincoln Investment 403B-RSP ⇒ Invesco Oppenheimer International Diversified A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lincoln Investment 403B-RSP ⇒ Invesco Summit Fund A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Next Chapter LLC, 100% Interest [OL]	SP	\$100,001 - \$250,000	Net Operating Income	\$15,001 - \$50,000	\$100,001 - \$1,000,000
LOCATION: Metuchen, NJ, US					
DESCRIPTION: Net Income, Speaking & Consulting Services					

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Mental Health Leadership Initiative	Spouse Salary	N/A	N/A
All Health	Spouse Speech	N/A	\$10,500.00
BCBS of Kansas	Spouse Speech	\$20,000.00	N/A
Bristol Myers Squibb	Spouse Speech	N/A	\$35,000.00
California Society for Democracy in Iran	Spouse Speech	\$25,000.00	N/A
Connecticut Community for Addiction Recovery	Spouse Speech	\$5,000.00	N/A
Diamond Healthcare	Spouse Speech	N/A	\$20,000.00
Georgia Southern University	Spouse Speech	N/A	\$34,000.00
Grant Haliburton Foundation	Spouse Speech	\$15,000.00	\$15,000.00
Hackensack Meridian Health	Spouse Speech	N/A	\$15,000.00
Hospital Association of Southern California	Spouse Speech	N/A	\$35,000.00
People's Mojahedin Organization of Iran	Spouse Speech	N/A	\$59,996.00
Telecare Corp	Spouse Speech	N/A	\$20,000.00
Texas Hospital Association	Spouse Speech	\$13,500.00	N/A
Zuckerberg San Fran General Hospital	Spouse Speech	N/A	\$25,000.00
CURA Strategies, LLC	Spouse Consulting	N/A	N/A
Braeburn Pharmaceuticals, Inc	Spouse Consulting	N/A	N/A
Carecentrix	Spouse Consulting	N/A	N/A
Clean Slate Centers	Spouse Consulting	N/A	N/A
Edgewood Health Network, Inc	Spouse Consulting	N/A	N/A
Innovatel, LLC	Spouse Consulting	N/A	N/A
Marwood Group	Spouse Consulting	N/A	N/A
Newport Academy	Spouse Consulting	N/A	N/A
Pharmaceutical Research and Manufacturers of America	Spouse Consulting	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo Home Mortgage	October 2010	Mortgage on Rental Property	\$100,001 - \$250,000
	Amalgamated Bank	March 2020	Draw on Line of Credit	\$100,001 - \$250,000
JT	American Express	April 2020	Revolving Charge Account	\$10,000 - \$15,000
SP	The Northern Trust Company	July 2019	Revolving Line of Credit	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Sole Proprietor	133 Oakcrest LLC
Board Member	InteraXon Inc
Board Member	Mental Health America
Education Director	Mental Health Leadership Initiative t/a The Kennedy Forum
Board Member	Parity.org
Advisory Board Member	Set to Go, a program of JED Foundation
Advisory Team Member	7 Cups
Sole Proprietor	AK Educational Consulting LLC
Sole Proprietor	Bayshore Designs, LLC
Advisory Board	Brain Futures
Proprietor	Clam Diggers Snow'd Inn, Inc
Board Member	Brigantine Yacht Club
Board Member	Kara Kennedy Fund

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Source (Name and Address)	Brief Description of Duties
Bureau of Childrens Behavioral Health Services (State College, PA, US)	Speech at Interagency Conference 2018

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> o 133 Oakcrest LLC (100% Interest) LOCATION: Northfield, NJ, US DESCRIPTION: Rental Property
<ul style="list-style-type: none"> o 529 Plan #1 (Owner: DC) LOCATION: NH
<ul style="list-style-type: none"> o 529 Plan #2 (Owner: DC) LOCATION: NH
<ul style="list-style-type: none"> o 529 Plan #3 (Owner: DC) LOCATION: NH
<ul style="list-style-type: none"> o 529 Plan #4 (Owner: DC) LOCATION: NH
<ul style="list-style-type: none"> o 529 Plan #5 (Owner: DC) LOCATION: NH
<ul style="list-style-type: none"> o Ascensus Roth IRA
<ul style="list-style-type: none"> o Equi-Vest TSA
<ul style="list-style-type: none"> o Family Trust #1 (100% Interest) (Owner: SP)
<ul style="list-style-type: none"> o Family Trust #1 ⇒ DD LLC (Owner: SP) LOCATION: Foxboro, MA, US DESCRIPTION: Holding Company
<ul style="list-style-type: none"> o Family Trust #1 ⇒ DD LLC ⇒ Clear Health Partners LLC (Owner: SP) LOCATION: US DESCRIPTION: Holding Company
<ul style="list-style-type: none"> o Family Trust #1 ⇒ Fidelity SEP-IRA (Owner: SP)
<ul style="list-style-type: none"> o Family Trust #1 ⇒ FK Ventures VII LLC (Owner: SP) LOCATION: Boston, MA, US
<ul style="list-style-type: none"> o Family Trust #1 ⇒ HPS Holdings LLC (Owner: SP) LOCATION: US
<ul style="list-style-type: none"> o Family Trust #1 ⇒ Park Holdings - Equity #1 (Owner: SP) LOCATION: US
<ul style="list-style-type: none"> o Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Buena Vista Asian Opportunity Fund (Owner: SP)
<ul style="list-style-type: none"> o Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ Generation IM Global Equity Fund, LLC (Owner: SP)
<ul style="list-style-type: none"> o Family Trust #1 ⇒ Park Holdings - Equity #1 ⇒ McDonald Capital Investors, Inc (Owner: SP) LOCATION: US
<ul style="list-style-type: none"> o Family Trust #1 ⇒ Park Holdings - Fixed Income #1 (Owner: SP) LOCATION: US
<ul style="list-style-type: none"> o Family Trust #1 ⇒ Park Holdings - Hedge #1 (Owner: SP) LOCATION: US

- Family Trust #1 ⇒ Park Holdings - Private Equity (Owner: SP)
LOCATION: US
- Family Trust #1 ⇒ Peoples United Brokerage Acct (Owner: SP)
LOCATION: US
- Family Trust #2 (100% Interest) (Owner: SP)
- Family Trust #2 ⇒ Park Holdings - Equity #2 (Owner: SP)
LOCATION: US
- Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ Generation IM Global Equity Fund, LLC (Owner: SP)
- Family Trust #2 ⇒ Park Holdings - Equity #2 ⇒ McDonald Capital Investors, Inc #2 (Owner: SP)
LOCATION: US
- Family Trust #2 ⇒ Park Holdings - Fixed Income #2 (Owner: SP)
LOCATION: US
- Family Trust #3 (100% Interest) (Owner: SP)
- Family Trust #3 ⇒ Park Holdings - Equity #3 (Owner: SP)
LOCATION: US
- Family Trust #3 ⇒ Park Holdings - Equity #3 ⇒ Buena Vista Asian Opportunity Fund (Owner: SP)
- Family Trust #3 ⇒ Park Holdings - Hedge #3 (Owner: SP)
LOCATION: US
- Fidelity SEP-IRA (Owner: SP)
- Lincoln Investment RTHIRA-RSP
- Lincoln Investment 403B-RS
- Lincoln Investment 403B-RSP

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes No

CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Amy Kennedy , 06/7/2020