



# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Gary Palmer  
**Status:** Member  
**State/District:** AL06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 05/28/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income opportu IOFIX [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Inst ETILX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Inspire Corp Bond IMPA IBD [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Funds Series Trust EV ETIDX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ SCM Trust Shelton Internat SISEX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate-Term VGIT [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AlphaCentric Income Opp IOFIX [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Institut ETILX [MF]	JT	\$15,001 - \$50,000	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Inspire Corporate Bond IMPA IBD [EF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Mutual Fund Series Trust EV ETIDX [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton Internati SISEX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [EF]	JT	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income opportu IOFIX [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Gilead FD Institut ETILX [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ SCM Trust Shelton Internati SISEX [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Canaan LLC [RP]  LOCATION: Lamar County, AL, US		\$100,001 - \$250,000	None		<input type="checkbox"/>
Equitable (formerly AXA Equitable) [OT]  DESCRIPTION: Flexible Premium Variable Life Insurance		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
TD Ameritrade G JT ⇒ AT&T Inc. (T) [ST]	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
United States Savings Bonds Series EE [GS]		\$1,001 - \$15,000	None		<input type="checkbox"/>

\* 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 B: TRANSACTIONS

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	SP	01/17/2020	P	\$15,001 - \$50,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	SP	03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	SP	07/14/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	SP	07/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	SP	12/15/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	SP	04/3/2020	P	\$15,001 - \$50,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	SP	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	SP	09/28/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	SP	03/25/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert Emg Mkts Eq CL CVMIX [MF]	SP	03/2/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	SP	09/25/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒	SP	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Calvert Emg Mkts Equity CL CVMIX [MF]					
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	SP	01/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	SP	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	SP	12/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert International Oppor COIIX [MF]	SP	01/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert International Oppor COIIX [MF]	SP	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert International Oppor COIIX [MF]	SP	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Calvert International Oppor COIIX [MF]	SP	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Camelot Excalibur Sm Cap CEXIX [MF]	SP	01/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	SP	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	SP	07/14/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	SP	01/15/2020	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	SP	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	SP	06/5/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	SP	09/28/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	SP	09/30/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Gilead FD Institute ETILX [MF]	SP	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Eventide Multi-Asset Income ETIMX [MF]	SP	01/16/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	SP	06/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	SP	09/25/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	SP	09/29/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	SP	01/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	SP	03/2/2020	P	\$15,001 - \$50,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	SP	03/25/2020	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	SP	04/3/2020	P	\$15,001 - \$50,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	SP	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	SP	07/14/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	SP	01/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	SP	01/17/2020	P	\$15,001 - \$50,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	SP	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	SP	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	SP	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	SP	09/25/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	SP	05/26/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	SP	06/10/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann	SP	11/16/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]					
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ SCM Trust Shelton Internati SISEX [MF]	SP	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ SCM Trust Shelton Internati SISEX [MF]	SP	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ SCM Trust Shelton International SISEX [MF]	SP	01/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ SCM Trust Shelton International SISEX [MF]	SP	01/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ SCM Trust Shelton International SISEX [MF]	SP	06/10/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ SCM Trust Shelton International SISEX [MF]	SP	07/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ SCM Trust Shelton International SISEX [MF]	SP	09/28/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Steward Large Cap Enhanced SEECX [MF]	SP	01/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Steward Large Cap Enhanced SEECX [MF]	SP	03/2/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Steward Large Cap Enhanced SEECX [MF]	SP	04/3/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Steward Large Cap Enhanced SEECX [MF]	SP	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>



<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Steward Large Cap Enhanced SEECX [MF]	SP	05/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	01/14/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	03/24/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	11/10/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	03/25/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	06/5/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	04/3/2020	P	\$15,001 - \$50,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	07/14/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	07/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒	SP	09/25/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Intermediate Term VGIT [EF]					
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Intermediate Term VGIT [EF]	SP	10/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF]	SP	01/16/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF]	SP	03/24/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF]	SP	06/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF]	SP	03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF]	SP	04/3/2020	P	\$15,001 - \$50,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF]	SP	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF]	SP	06/5/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA ⇒ Vanguard Mortgage Business VMBS [EF]	SP	10/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AlphaCentric Income Opp IOFIX [MF]	JT	03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AlphaCentric Income Opp IOFIX [MF]	JT	03/25/2020	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AlphaCentric Income Opp IOFIX [MF]	JT	04/3/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AlphaCentric Income Opp IOFIX [MF]	JT	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AlphaCentric Income Opp IOFIX [MF]	JT	09/28/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AlphaCentric Income Opp IOFIX [MF]	JT	01/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AlphaCentric Income Opp IOFIX [MF]	JT	07/14/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AlphaCentric Income Opp IOFIX [MF]	JT	07/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ AlphaCentric Income Opp IOFIX [MF]	JT	12/15/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	JT	12/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	JT	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	JT	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	JT	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	JT	01/15/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	JT	09/25/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert International Oppor (COIIX) [MF]	JT	05/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert International Oppor (COIIX) [MF]	JT	03/2/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert International Oppor (COIIX) [MF]	JT	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Calvert International Oppor (COIIX) [MF]	JT	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Camelot Excalibur Small Cap (CEXIX) [MF]	JT	01/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Camelot Premium Return Fund (CPRIX) [MF]	JT	01/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Institut ETILX [MF]	JT	01/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Institut ETILX [MF]	JT	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Institut ETILX [MF]	JT	06/5/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Institut ETILX [MF]	JT	09/28/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD	JT	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameritrade JT Account ⇒ Eventide Gilead FD Institut ETILX [MF]					
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Institut ETILX [MF]	JT	07/14/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Eventide Gilead FD Institut ETILX [MF]	JT	03/2/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Inspire Corporate Bond IMPA (IBD) [EF]	JT	03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Inspire Corporate Bond IMPA (IBD) [EF]	JT	03/25/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Inspire Corporate Bond IMPA (IBD) [EF]	JT	04/3/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Inspire Corporate Bond IMPA (IBD) [EF]	JT	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Inspire Corporate Bond IMPA (IBD) [EF]	JT	07/14/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Inspire Corporate Bond IMPA (IBD) [EF]	JT	07/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Inspire Corporate Bond IMPA (IBD) [EF]	JT	06/9/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Inspire Corporate Bond IMPA (IBD) [EF]	JT	09/25/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Mutual Fund Series Trust EV ETIDX [MF]	JT	01/17/2020	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Mutual Fund Series Trust EV ETIDX [MF]	JT	05/26/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Mutual Fund Series Trust EV ETIDX [MF]	JT	06/10/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Mutual Fund Series Trust EV ETIDX [MF]	JT	11/10/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Mutual Fund Series Trust EV ETIDX [MF]	JT	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Mutual Fund Series Trust EV ETIDX [MF]	JT	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Mutual Fund Series Trust EV ETIDX [MF]	JT	09/25/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Mutual Fund Series Trust EV ETIDX [MF]	JT	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton Internati SISEX [MF]	JT	05/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton Internati SISEX [MF]	JT	01/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton Internati SISEX [MF]	JT	06/10/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton Internati SISEX [MF]	JT	07/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒	JT	09/28/2020	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
SCM Trust Shelton Internati SISEX [MF]					
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton Internati SISEX [MF]	JT	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton Internati SISEX [MF]	JT	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton Internati SISEX [MF]	JT	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton Internati SISEX [EF]	JT	03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ SCM Trust Shelton Internati SISEX [MF]	JT	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Steward Large Cap Enhance (SEECX) [MF]	JT	01/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Steward Large Cap Enhance (SEECX) [MF]	JT	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Steward Large Cap Enhance (SEECX) [MF]	JT	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Steward Large Cap Enhance (SEECX) [MF]	JT	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Steward Large Cap Enhance (SEECX) [MF]	JT	05/26/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	03/2/2020	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	03/25/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	04/3/2020	P	\$15,001 - \$50,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	07/14/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	07/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	09/25/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	10/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	01/14/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	03/24/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	05/12/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Intermediate-Term VGIT [EF]	JT	11/10/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [EF]	JT	03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [EF]	JT	04/3/2020	P	\$1,001 - \$15,000	



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [EF]	JT	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [EF]	JT	06/5/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [EF]	JT	01/16/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [EF]	JT	03/24/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account ⇒ Vanguard Mortgage Business VMBS [EF]	JT	06/9/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income Opportu IOFIX [MF]		05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income Opportu IOFIX [MF]		04/3/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income Opportu IOFIX [MF]		03/25/2020	P	\$15,001 - \$50,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income Opportu IOFIX [MF]		03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income Opportu IOFIX [MF]		09/28/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income Opportu IOFIX [MF]		01/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD		07/14/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

<b>Asset</b>	<b>Owner Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Ameritrade Gary IRA ⇒ Alphacentric Income Opportu IOFIX [MF]				
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	07/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Alphacentric Income Opportu IOFIX [MF]	12/15/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	12/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	03/2/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Calvert Emg Mkts Equity CL CVMIX [MF]	09/25/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Calvert International Oppor COIIX [MF]	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Calvert International Oppor COIIX [MF]	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Calvert International Oppor COIIX [MF]	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Camelot Excalibur Sm Cap CEXIX [MF]	01/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Camelot Premium Return Fund CPRIX [MF]	01/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	01/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	09/28/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	06/5/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Gilead FD Institut ETILX [MF]	07/14/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Eventide Multi-Asset Income ETIMX [MF]	01/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	01/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	03/25/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒	04/3/2020	P	\$15,001 - \$50,000	

<b>Asset</b>	<b>Owner Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Inspire Corporate Bond IMPA IBD [EF]				
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	07/14/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	06/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Inspire Corporate Bond IMPA IBD [EF]	09/25/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	01/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	05/26/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	06/10/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	11/16/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	01/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Mutual Fund Series Trust EV ETIDX [MF]	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ SCM Trust Shelton International SISEX [MF]	01/15/2020	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ SCM Trust Shelton International SISEX [MF]	01/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ SCM Trust Shelton International SISEX [MF]	06/10/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ SCM Trust Shelton International SISEX [MF]	07/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ SCM Trust Shelton International SISEX [MF]	09/28/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ SCM Trust Shelton International SISEX [MF]	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ SCM Trust Shelton International SISEX [MF]	04/3/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ SCM Trust Shelton International SISEX [MF]	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Steward Large Cap Enhanced SEECX [MF]	01/15/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Steward Large Cap Enhanced SEECX [MF]	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Steward Large Cap Enhanced SEECX [MF]	05/26/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Steward Large Cap Enhanced SEECX [MF]	04/3/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Steward Large Cap Enhanced SEECX [MF]	03/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

<b>Asset</b>	<b>Owner Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	03/25/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	04/3/2020	P	\$15,001 - \$50,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	06/5/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	07/14/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	07/17/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	09/25/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	10/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	01/14/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	03/24/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]	05/12/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD	11/10/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameritrade Gary IRA ⇒ Vanguard Intermediate Term VGIT [EF]				
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF]	03/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF]	04/3/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF]	05/12/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF]	06/5/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF]	10/2/2020	P	\$1,001 - \$15,000	
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF]	01/16/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF]	03/24/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA ⇒ Vanguard Mortgage Business VMBS [EF]	06/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

\* 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
Fast Appliance	part-time book keeping	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Regions Bank	September 2010	Mortgage on primary residence in Hoover, AL	\$100,001 - \$250,000

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

None disclosed.

### SCHEDULE G: GIFTS

None disclosed.

### SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

### SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

### SCHEDULE A AND B ASSET CLASS DETAILS

- Ameriprise ADP Ann Palmer IRA (Owner: SP)
- Ameriprise ADP Ann Palmer IRA ⇒ TD Ameritrade Ann IRA (Owner: SP)
- Ameriprise ADP Gary and Ann Palmer Joint (Owner: JT)  
LOCATION: US
- Ameriprise ADP Gary and Ann Palmer Joint ⇒ TD Ameritrade JT Account (100% Interest) (Owner: JT)  
LOCATION: AL, US
- Ameriprise ADP Gary Palmer Individual IRA
- Ameriprise ADP Gary Palmer Individual IRA ⇒ TD Ameritrade Gary IRA
- TD Ameritrade G JT (Owner: JT)  
LOCATION: US

### EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

Yes  No

**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:** Hon. Gary Palmer , 05/28/2021