



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Lisa Blunt Rochester
Status: Member
State/District: DE00

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2020
Filing Date: 08/10/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles R Rochester Jr Estate - Cash [OT] DESCRIPTION: Cash		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Inter-Family Promissory Note [DO]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ AMERICAN FUNDS EUROPACIFIC GROWTH AEPFX [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ BLMBG BARCLAYS HIGH YIELD (JNK) BOND ETF [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ DODGE & COX FUNDS INCOME DODIX [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ ISHARES 1 3 YR TREAS BD ETF (SHY) [EF] DESCRIPTION: ISHARES 1 3 YR TREAS BD ETF (SHY)		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒		None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Barclays 1-3 Year Credit Bond Fd (IGSB) [EF] DESCRIPTION: iShares Barclays 1-3 Year Credit Bond Fd (IGSB)					
LISA BLUNT ROCHESTER IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF] DESCRIPTION: iShares Core MSCI EAFE ETF (IEFA)		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF] DESCRIPTION: iShares Core MSCI Emerging Markets ETF (IEMG)		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ ISHARES CORE S&P MCP ETF (IJH) [EF] DESCRIPTION: ISHARES CORE S&P MCP ETF (IJH)		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF] DESCRIPTION: iShares Core S&P Small-Cap ETF (IJR)		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ ishares Gold Trust (IAU) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF] DESCRIPTION: iShares Intermediate Government/Credit (GVI)		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ ISHARES INTRM TR CRP ETF (IGIB) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ ISHARES MBS ETF (MBB) [EF] DESCRIPTION: ISHARES MBS ETF (MBB)		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF] DESCRIPTION: iShares MSCI EAFE ETF (EFA)		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares Russell 1000 ETF (IWB) [EF] DESCRIPTION: iShares Russell 1000 ETF (IWB)		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares Russell Mid-Cap ETF (IWR) [EF] DESCRIPTION: iShares Russell Mid-Cap ETF (IWR)		None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LISA BLUNT ROCHESTER IRA ⇒ JPMORGAN FUNDS EMRG MKTS EQTY JMIEX [MF] DESCRIPTION: JPMORGAN FUNDS EMRG MKTS EQTY JMIEX		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Money Market [BA] DESCRIPTION: FDIC INSURED DEPOSIT ACCOUNT IDA12 NOT COVERED BY SIPC		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ SPDR DoubleLine Total Return Tactical ETF (TOTL) [EF] DESCRIPTION: SPDR DoubleLine Total Return Tactical ETF (TOTL)		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ SPDR S&P 500 (SPY) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Growth ETF (VUG) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ VANGUARD HIGH YIELD CORP ADMIRAL VWEAX [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF] DESCRIPTION: Vanguard S&P 500 ETF (VOO)		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Small-Cap ETF (VB) [EF] DESCRIPTION: Vanguard Small-Cap ETF (VB)		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Value ETF (VTV) [EF] DESCRIPTION: Vanguard Value ETF (VTV)		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
WCM FOCUSED INTL GROWTH WCMIX [MF]					
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ AMERICAN FUNDS EUROPACIFIC GROWTH AEPFX [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ DODGE & COX FUNDS INCOME DODIX [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]		None	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF] DESCRIPTION: iShares Core S&P Mid-Cap ETF (IJH)		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ ishares Gold Trust (IAU) [EF] DESCRIPTION: ishares Gold Trust (IAU)		None	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares MBS ETF (MBB) [EF] DESCRIPTION: iShares MBS ETF (MBB)		None	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares MSCI EAFE ETF (EFA) [EF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ ISHARES RUS 1000 ETF (IWB) [EF] DESCRIPTION: ISHARES RUS 1000 ETF (IWB)		\$50,001 - \$100,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ ISHARES TRUST INTRM TR CRP ETF (IGIB) [EF]		None	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ ISHARES TRUST SH TR (IGSB) [EF]		None	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ JPMORGAN FUNDS EMRG MKTS EQTY JMIEX [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Money Market [BA] DESCRIPTION: FDIC INSURED DEPOSIT ACCOUNT IDA12 NOT COVERED BY SIPC		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ SPDR Barclays High Yield Bond ETF (JNK) [EF]		None	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ SPDR TR S&P 500 ETF TR (SPY) [EF] DESCRIPTION: SPDR TR S&P 500 ETF TR (SPY)		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ SSGA ACTIVE ETF TRUST SPDR TR TACTIC (TOTL) [EF]		None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF] DESCRIPTION: Vanguard FTSE Developed Markets ETF (VEA)		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF] DESCRIPTION: VWO		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Growth ETF (VUG) [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ VANGUARD HIGH YIELD CORP ADMIRAL VWEAX [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Small-Cap ETF (VB) [EF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Total Bond Market ETF (BND) [EF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Value ETF (VTV) [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ WCM FOCUSED INTL GROWTH WCMIX [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF] DESCRIPTION: iShares 1-3 Year Treasury Bond ETF (SHY)		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Barclays 1-3 Year Credit Bond Fd (IGSB) [EF] DESCRIPTION: IGSB was CSJ.		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Cohen & Steers REIT ETF (ICF) [EF]		None	Tax-Deferred		<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Core MSCI EAFE ETF (IEFA) [ST]					
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares MSCI All Country World Minimum Volatility Index Fund (ACWV) [EF]		None	Tax-Deferred		<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares MSCI USA Minimum Volatility ETF (USMV) [EF]		None	Tax-Deferred		<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ ISHARES TRUST RUS 1000 (IWB) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ ISHARES TRYST MBS (MBB) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Money Market [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: FDIC INSURED DEPOSIT ACCOUNT IDA12 NOT COVERED BY SIPC					
LISA BLUNT ROCHESTER ROTH IRA ⇒ SPDR Bloomberg Barclays High Yield Bond ETF (JNK) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LISA BLUNT ROCHESTER ROTH IRA ⇒ SPDR DoubleLine Total Return Tactical ETF (TOTL) [EF]		None	Tax-Deferred		<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ SPDR S&P 500 TRUST (SPY) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ VANGUARD FTSE DEV MKT (VEA) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ VANGUARD FTSE EMERG MKT (VWO) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard Growth ETF (VUG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
M&T Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
ND LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Money Market [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: FDIC INSURED DEPOSIT ACCOUNT IDA12 NOT COVERED BY SIPC					
Santander Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Seton Villa Rental Home [RP]		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Wilmington , DE, US DESCRIPTION: Rental Property					
Tosk, Inc. [PS]		\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: 8,333 shares of Series D Preferred Stock					
Wells Fargo Bank Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LISA BLUNT ROCHESTER IRA ⇒ AMERICAN FUNDS EUROPACIFIC GROWTH AEPFX [MF]		10/9/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER IRA ⇒ DODGE & COX FUNDS INCOME DODIX [MF]		10/9/2020	P	\$50,001 - \$100,000	
LISA BLUNT ROCHESTER IRA ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF] DESCRIPTION: iShares 1-3 Year Treasury Bond ETF (SHY)		06/18/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF] DESCRIPTION: iShares 1-3 Year Treasury Bond ETF (SHY)		07/15/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [EF] DESCRIPTION: iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB)		06/18/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [EF] DESCRIPTION: iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB)		10/9/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF] DESCRIPTION: iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB)		08/21/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF] DESCRIPTION: iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB)		10/9/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
LISA BLUNT ROCHESTER IRA ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF] DESCRIPTION: iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB)	06/18/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF] DESCRIPTION: iShares Core MSCI EAFE ETF (IEFA)	06/10/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF] DESCRIPTION: iShares Core MSCI EAFE ETF (IEFA)	07/16/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF] DESCRIPTION: iShares Core MSCI Emerging Markets ETF (IEMG)	10/9/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF] DESCRIPTION: iShares Core S&P Mid-Cap ETF (IJH)	02/28/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF] DESCRIPTION: iShares Core S&P Mid-Cap ETF (IJH)	03/17/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF] DESCRIPTION: iShares Core S&P Mid-Cap ETF (IJH)	06/3/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF] DESCRIPTION: iShares Core S&P Mid-Cap ETF (IJH)	10/9/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF] DESCRIPTION: iShares Core S&P Small-Cap ETF (IJR)	10/9/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER IRA ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF] DESCRIPTION: iShares Gold Trust Shares of the iShares Gold Trust (IAU)	06/18/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]	10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: iShares Gold Trust Shares of the iShares Gold Trust (IAU)					
LISA BLUNT ROCHESTER IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		04/29/2020	P	\$1,001 - \$15,000	
DESCRIPTION: iShares Intermediate Government/Credit Bond ETF (GVI)					
LISA BLUNT ROCHESTER IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		08/21/2020	P	\$15,001 - \$50,000	
DESCRIPTION: iShares Intermediate Government/Credit Bond ETF (GVI)					
LISA BLUNT ROCHESTER IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		10/9/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: iShares Intermediate Government/Credit Bond ETF (GVI)					
LISA BLUNT ROCHESTER IRA ⇒ iShares MBS ETF (MBB) [EF]		07/20/2020	P	\$50,001 - \$100,000	
DESCRIPTION: iShares MBS ETF (MBB)					
LISA BLUNT ROCHESTER IRA ⇒ iShares MBS ETF (MBB) [EF]		10/9/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: iShares MBS ETF (MBB)					
LISA BLUNT ROCHESTER IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF]		01/13/2020	P	\$15,001 - \$50,000	
DESCRIPTION: iShares MSCI EAFE ETF (EFA)					
LISA BLUNT ROCHESTER IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF]		02/27/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: iShares MSCI EAFE ETF (EFA)					
LISA BLUNT ROCHESTER IRA ⇒ iShares Russell 1000 ETF (IWB) [EF]		10/9/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: iShares Russell 1000 ETF (IWB)					
LISA BLUNT ROCHESTER IRA ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]		04/24/2020	P	\$15,001 - \$50,000	
DESCRIPTION: iShares Russell Mid-Cap ETF (IWR)					
LISA BLUNT ROCHESTER IRA ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]		10/9/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: iShares Russell Mid-Cap ETF (IWR)					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LISA BLUNT ROCHESTER IRA ⇒ JPMORGAN FUNDS EMRG MKTS EQTY JMIEX [MF] DESCRIPTION: JPMORGAN FUNDS EMRG MKTS EQTY		10/9/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER IRA ⇒ SPDR Bloomberg Barclays High Yield Bond ETF (JNK) [EF] DESCRIPTION: SPDR Bloomberg Barclays High Yield Bond ETF (JNK)		06/18/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER IRA ⇒ SPDR Bloomberg Barclays High Yield Bond ETF (JNK) [EF] DESCRIPTION: SPDR Bloomberg Barclays High Yield Bond ETF (JNK)		10/9/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ SPDR DoubleLine Total Return Tactical ETF (TOTL) [EF] DESCRIPTION: SPDR DoubleLine Total Return Tactical ETF (TOTL)		01/13/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ SPDR DoubleLine Total Return Tactical ETF (TOTL) [EF] DESCRIPTION: SPDR DoubleLine Total Return Tactical ETF (TOTL)		04/28/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ SPDR S&P 500 (SPY) [EF] DESCRIPTION: SPDR S&P 500 (SPY)		10/9/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF] DESCRIPTION: Vanguard FTSE Developed Markets ETF (VEA)		10/9/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		04/23/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Growth ETF (VUG) [EF]		04/7/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Growth ETF (VUG) [EF]		09/16/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Growth ETF (VUG) [EF]		10/9/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ VANGUARD HIGH YIELD CORP ADMIRAL VWEAX [MF]		10/9/2020	P	\$15,001 - \$50,000	

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
LISA BLUNT ROCHESTER IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF] DESCRIPTION: Vanguard S&P 500 ETF (VOO)	10/9/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Small-Cap ETF (VB) [EF] DESCRIPTION: Vanguard Small-Cap ETF (VB)	09/16/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Small-Cap ETF (VB) [EF] DESCRIPTION: Vanguard Small-Cap ETF (VB)	10/9/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	10/9/2020	P	\$50,001 - \$100,000	
LISA BLUNT ROCHESTER IRA ⇒ Vanguard Value ETF (VTV) [EF] DESCRIPTION: Vanguard Value ETF (VTV)	10/9/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER IRA ⇒ WCM FOCUSED INTL GROWTH WCMIX [MF]	10/9/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ AMERICAN FUNDS EUROPACIFIC GROWTH AEPFX [MF]	10/9/2020	P	\$250,001 - \$500,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ DODGE & COX FUNDS INCOME DODIX [MF]	10/9/2020	P	\$1,000,001 - \$5,000,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]	07/15/2020	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]	06/17/2020	S	\$100,001 - (partial) \$250,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [EF]	10/9/2020	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒	06/17/2020	S	\$250,001 - (partial) \$500,000	<input checked="" type="checkbox"/>

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [EF]				
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]	10/9/2020	S	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]	08/21/2020	S (partial)	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]	06/17/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	10/9/2020	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	07/16/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	06/10/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	10/9/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	06/3/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	03/17/2020	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	02/28/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015	10/9/2020	P	\$100,001 -	

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
LISA BLUNT ROCHESTER TR ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]			\$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]	10/9/2020	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]	06/17/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]	02/13/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]	10/9/2020	S	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]	06/17/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]	04/29/2020	P	\$250,001 - \$500,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]	08/21/2020	P	\$250,001 - \$500,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares MBS ETF (MBB) [EF]	10/9/2020	S	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ iShares MBS ETF (MBB) [EF]	07/21/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒	06/17/2020	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares MBS ETF (MBB) [EF]					
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => iShares MSCI EAFE ETF (EFA) [EF]		01/10/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => iShares MSCI EAFE ETF (EFA) [EF]		02/27/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => iShares Russell 1000 ETF (IWB) [EF]		06/17/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => iShares Russell 1000 ETF (IWB) [EF]		10/12/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => iShares Russell 1000 ETF (IWB) [EF]		10/9/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => iShares Russell 1000 ETF (IWB) [EF]		02/13/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => iShares Russell Mid-Cap ETF (IWR) [EF]		04/24/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => JPMORGAN FUNDS EMRG MKTS EQTY JMIEX [MF]		10/9/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => SPDR Bloomberg Barclays High Yield Bond ETF (JNK) [EF]		10/9/2020	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => SPDR Bloomberg Barclays High Yield Bond ETF (JNK) [EF]		06/17/2020	P	\$50,001 - \$100,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR => SPDR DoubleLine Total Return Tactical ETF (TOTL) [EF]		04/28/2020	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ SPDR DoubleLine Total Return Tactical ETF (TOTL) [EF]		01/10/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ SPDR S&P 500 (SPY) [EF]		10/9/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ SPDR S&P 500 (SPY) [EF]		06/17/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ SPDR S&P 500 (SPY) [EF]		02/13/2020	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		10/9/2020	S (partial)	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		06/17/2020	P	\$15,001 - \$50,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		04/23/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		02/13/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Growth ETF (VUG) [EF]		10/9/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Growth ETF (VUG) [EF]		09/16/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Growth ETF (VUG) [EF]		04/7/2020	P	\$250,001 - \$500,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015		10/9/2020	P	\$100,001 -	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LISA BLUNT ROCHESTER TR ⇒ VANGUARD HIGH YIELD CORP ADMIRAL VWEAX [MF]				\$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Small-Cap ETF (VB) [EF]		10/9/2020	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Small-Cap ETF (VB) [EF]		09/16/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Total Bond Market ETF (BND) [EF]		10/9/2020	P	\$1,000,001 - \$5,000,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ Vanguard Value ETF (VTV) [EF]		10/9/2020	P	\$100,001 - \$250,000	
LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR ⇒ WCM FOCUSED INTL GROWTH WCMIX [MF]		10/9/2020	P	\$250,001 - \$500,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]		07/15/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [EF]		06/18/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [EF]		10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]		08/21/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]		10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		06/10/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒		10/9/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares Core MSCI EAFE ETF (IEFA) [EF]					
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		10/9/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		03/17/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		02/28/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		06/3/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		10/9/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		10/9/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		10/9/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]		10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		04/29/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		08/21/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares MBS ETF (MBB) [EF]		10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares MBS ETF (MBB) [EF]		07/20/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF]		02/27/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares MSCI EAFE ETF (EFA) [EF]		01/13/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Russell 1000 ETF (IWB) [EF]		10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]		10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]		04/24/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ SPDR DoubleLine Total Return Tactical ETF (TOTL) [EF]		01/13/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ SPDR S&P 500 (SPY) [EF]		10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		04/23/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard Growth ETF (VUG) [EF]		09/16/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard Growth ETF (VUG) [EF]		04/7/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		10/9/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]		10/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]		09/16/2020	P	\$1,001 - \$15,000	
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]		10/9/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LISA BLUNT ROCHESTER ROTH IRA ⇒ Vanguard Value ETF (VTV) [EF]		10/9/2020	P	\$1,001 - \$15,000	

* 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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Fulton Bank	July 2017	Mortgage on Primary Residence.	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Committee Member	National Advisory Council for Aspen Institute's Future of Work

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2018	Schneider Electric	An agreement between the widow spouse (Lisa) and Schneider Electric for a spousal death benefit from Lisa's late husband's retirement benefit plan who was an employee of Schneider Electric. Lisa was entitled to begin this monthly payout in 2018.

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

- o LISA BLUNT ROCHESTER IRA
- o LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR
- o LISA BLUNT ROCHESTER ROTH IRA
- o ND LISA BLUNT ROCHESTER REV TST UA Apr 02,2015 LISA BLUNT ROCHESTER TR

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. Lisa Blunt Rochester , 08/10/2021