



Filing ID #10056924

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** David Taylor  
**Status:** Congressional Candidate  
**State/District:** OH02

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2023  
**Filing Date:** 03/23/2024  
**Period Covered:** 01/01/2023– 01/18/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(AT) 529 Account #1 at UBS (CE 35903) ⇒ The Investment Company of America, Class 529-A Shares (CICAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
(AT) 529 Account #2 at UBS (CE 77383) ⇒ BlackRock Growth Portfolio Option Class A (BOGAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
(ET) 529 Account #1 at UBS (CE 35898) ⇒ Capital Income Builder Class 529-A Shares (CIRAX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
(ET) 529 Account #1 at UBS (CE 35898) ⇒ New Perspective Fund, Class 529-A Shares (CNPAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
(ET) 529 Account #1 at UBS (CE 35898) ⇒ The Growth Fund of America Class 529-A Shares (CGFAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
(ET) 529 Account #1 at UBS (CE 35898) ⇒ The Investment Company of America, Class 529-A Shares (CICAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(ET) 529 Account #2 at UBS (CE 77385) ⇒ BlackRock Growth Portfolio Option Class A (BOGAX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
(MT) 529 Account at UBS (CE 35899) ⇒ The Growth Fund of America Class 529-A Shares (CGFAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
(MT) 529 Account at UBS (CE 35899) ⇒ The Investment Company of America, Class 529-A Shares (CICAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
David Taylor Trust ⇒ 5/3 Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ First State Bank account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ J. P. Morgan Chase Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ OPERS [PE]		\$15,001 - \$50,000	None		
David Taylor Trust ⇒ Rental property [RP] LOCATION: Cincinnati, OH, US		\$250,001 - \$500,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
David Taylor Trust ⇒ Sardinia Ready Mix, Inc. [PS] DESCRIPTION: Sardinia Ready Mix, Inc (S Corp) deliver ready mix concrete Sardinia, Ohio		\$5,000,001 - \$25,000,000	Non-salary income distribution	\$100,001 - \$1,000,000	\$1,000,001 - \$5,000,000
David Taylor Trust ⇒ Taylor Asphalt Restoration [OL] LOCATION: Amelia, OH, US DESCRIPTION: asphalt repair business, Amelia, Ohio		\$100,001 - \$250,000	partnership income	None	\$5,001 - \$15,000
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ AB Large Cap Growth Fund, Inc. - Advisor Class (APGYX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
American Century Global Real Estate Fund R6 Cl (ARYDX) [MF]					
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ BlackRock LifePath Index 2040 Port Cl K Shs (LIKXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ Fidelity Emerging Markets Index Fund (FPADX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ Fidelity International Index Fund (FSPSX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ Fidelity Small Cap Index Fund (FSSNX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ FVIT-Franklin Small Cap Value Fund - CL R6 (FRCSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ Leuthold Core Investment Fund (LCORX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ SMALLCAP World Fund, Inc. Cl R-6 (RLLGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity ⇒ Washington Mutual Investors Fund Cl R-6 Shs (RWMGX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ AB Large Cap Growth Fund, Inc. - Advisor Class (APGYX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ American Century Global Real Estate Fund R6 Cl (ARYDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ BlackRock LifePath Index 2040 Port Cl K Shs (LIKKX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity Emerging Markets Index Fund (FPADX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity International Index Fund (FSPSX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) -		\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Dave ⇒ Fidelity Small Cap Index Fund (FSSNX) [MF]		\$100,000			
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity Small Cap Index Fund (FSSNX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ FVIT-Franklin Small Cap Value Fund - CL R6 (FRCSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ SMALLCAP World Fund, Inc. Cl R-6 (RLLGX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Washington Mutual Investors Fund Cl R-6 Shs (RWMGX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ AT&T Inc. (T) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Chevron Corporation Common Stock (CVX) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN)	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[ST]					
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Intel Corporation - Common Stock (INTC) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Invesco Pharmaceuticals ETF (PJP) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Medpace Holdings, Inc. - Common Stock (MEDP) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Progressive Corporation (PGR) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ The J.M. Smucker Company Common Stock (SJM) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Visa Inc. (V) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Wendy's Company (WEN) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ AGCO Corporation Common Stock (AGCO) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ American Financial Group, Inc. Common Stock (AFG) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Chevron Corporation Common Stock (CVX) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ DTE Energy Company Common Stock (DTE) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ FMC Corporation Common Stock (FMC) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Globe Life Inc. Common Stock (GL) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Home Depot, Inc. (HD) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - JT (Non-Managed) ⇒ NiSource Inc Common Stock (NI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - JT (Non-Managed) ⇒ Northrop Grumman Corporation Common Stock (NOC) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - JT (Non-Managed) ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - JT (Non-Managed) ⇒ PPG Industries, Inc. Common Stock (PPG) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - JT (Non-Managed) ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - JT (Non-Managed) ⇒ Timken Company (TKR) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - JT (Non-Managed) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

\* Investment vehicle 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
Sardinia Ready Mix, Inc.	Salary	\$25,088.91	\$221,090.78
Sardinia Ready Mix, Inc.	spouse salary	N/A	N/A
Clermont County	salary	\$3,600.00	\$15,600.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	First State Bank, Winchester, Ohio	May 2020	Mortgage on rental property, Cincinnati, Ohio	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Sardinia Ready Mix, Inc.
Trustee	David Taylor Trust
Assistant Prosecutor	Clermont County

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 1995	Myself and the State of Ohio	Continued participation in pension plan

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>◦ (AT) 529 Account #1 at UBS (CE 35903) (Owner: SP) LOCATION: OH</li><li>◦ (AT) 529 Account #2 at UBS (CE 77383) (Owner: SP) LOCATION: OH</li><li>◦ (ET) 529 Account #1 at UBS (CE 35898) (Owner: SP) LOCATION: OH</li><li>◦ (ET) 529 Account #2 at UBS (CE 77385) (Owner: SP) LOCATION: OH</li><li>◦ (MT) 529 Account at UBS (CE 35899) (Owner: SP) LOCATION: OH</li><li>◦ David Taylor Trust</li><li>◦ David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Charity</li><li>◦ David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave</li><li>◦ David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown)</li><li>◦ David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed)</li></ul>
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### 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:** David Taylor , 03/23/2024