



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Jake Auchincloss
Status: Member
State/District: MA04

FILING INFORMATION

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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
529 DC1 ⇒ American Balanced Fund, Class 529-A Shares (CLBAX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC1 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
529 DC1 ⇒ Capital World Growth and Income Fund - Class 529-F-2 (FCWGX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC1 ⇒ The New Economy Fund - Class 529-F-2 (FNEEX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC1 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ American Balanced Fund, Class 529-A Shares (CLBAX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]					
529 DC2 ⇒ American Funds New World Fund A (NEWFX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ EuroPacific Growth Fund - Class 529-F-2 (FUEPX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ The New Economy Fund - Class 529-F-2 (FNEEX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC3 ⇒ AMCAP Fund - Class 529-F-2 (FMMMX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC3 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC3 ⇒ Capital Income Builder Cl F-2 Shs (CAIFX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC3 ⇒ EuroPacific Growth Fund - Class 529-F-2 (FUEPX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC3 ⇒ The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC3 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [OT] DESCRIPTION: Mutual Fund	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Bank of America Checking - MG [BA]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
Bank of America Savings - MG [BA]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Geraldine Glimcher Excepted Trust [EQ]		Undetermined	Trust Distribution	\$15,001 - \$50,000	<input type="checkbox"/>
Newton house [RP]	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Newton, MA, US					
Savings USAA TA [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ Fidelity Cash Reserves (FDRXX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	DC	None	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	DC	None	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ BlackRock U.S. Carbon Transition Readiness ETF	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
(LCTU) [EF]					
SFP/MMLIS Individual Acct - DC2 ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	DC	None	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	DC	None	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC3 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC3 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC3 ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC3 ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC3 ⇒	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares MSCI USA Quality Factor ETF (QUAL) [EF]					<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC3 ⇒ iShares S&P 100 ETF (OEF) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Purchase less than \$1,000					
SFP/MMLIS Individual Acct - DC3 ⇒ iShares U.S. Technology ETF (IYW) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Purchase less than \$1,000					
SFP/MMLIS Individual Acct - JA ⇒ Domini Impact Bond Fund Institutional Shares (DSBIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ First Trust Water ETF (FIW) [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ PIMCO Total Return ESG Fund Institutional Class (PTSAX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SFP/MMLIS Individual Acct - JA ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Advantage Cash Sweep [BA]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Domini Impact Bond Fund Institutional Shares (DSBIX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Hartford Schrodgers International Stock Fund (SCIEX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SFP/MMLIS Individual Acct - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ PIMCO Total Return ESG Fund Institutional Class (PTSAX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS IRA - MG ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS IRA - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS IRA - MG ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS IRA - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS IRA - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS IRA - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS IRA - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX)	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
[EF]					
SFP/MMLIS Roth IRA - JA ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		None	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ Insight Cash Sweep [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SFP/MMLIS Roth IRA - MG ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
USAA Checking - Joint [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
USAA checking & savings [BA]		\$50,001 - \$100,000	None		<input type="checkbox"/>
USAA Savings - Joint [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>

* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
529 DC3 ⇒ AMCAP Fund - Class 529-F-2 (FMMMX) [MF]	DC	06/8/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
529 DC3 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	06/8/2023	P	\$15,001 - \$50,000	
529 DC3 ⇒ Capital Income Builder Cl F-2 Shs (CAIFX) [MF]	DC	06/8/2023	P	\$1,001 - \$15,000	
529 DC3 ⇒ EuroPacific Growth Fund - Class 529-F-2 (FUEPX) [MF]	DC	06/8/2023	P	\$1,001 - \$15,000	
529 DC3 ⇒ The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]	DC	06/8/2023	P	\$1,001 - \$15,000	
529 DC3 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	06/8/2023	P	\$1,001 - \$15,000	
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	12/21/2023	S	\$250,001 - \$500,000	<input type="checkbox"/>
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	03/31/2023	P	\$15,001 - \$50,000	
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	06/30/2023	P	\$1,001 - \$15,000	
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	09/29/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	03/21/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	04/12/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Individual Acct - DC1 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	07/24/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	10/23/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]	DC	07/24/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	04/12/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	04/20/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	DC	04/12/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	DC	07/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	DC	10/23/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	07/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	04/12/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	10/23/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	DC	04/20/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	DC	07/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	DC	10/23/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Individual Acct - DC1 ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]	DC	04/20/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]	DC	10/23/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]	DC	01/13/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	04/12/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	07/24/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	10/23/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]	DC	07/24/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	04/12/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	04/20/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	DC	04/12/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	DC	07/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	DC	10/23/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	04/20/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	04/12/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	DC	04/20/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	DC	07/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	DC	10/23/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]	DC	04/20/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC3 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	06/14/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	06/9/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	06/14/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	07/24/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC3 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	06/9/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC3 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	06/14/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC3 ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]	DC	06/9/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC3 ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]	DC	06/14/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC3 ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	DC	06/14/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC3 ⇒	DC	06/9/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares MSCI USA Quality Factor ETF (QUAL) [EF]					
SFP/MMLIS Individual Acct - DC3 ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	DC	06/14/2023	P	\$1,001 - \$15,000	
SFP/MMLIS IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	12/27/2023	P	\$15,001 - \$50,000	
SFP/MMLIS IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	12/28/2023	P	\$1,001 - \$15,000	
SFP/MMLIS IRA - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	12/28/2023	P	\$1,001 - \$15,000	
SFP/MMLIS IRA - MG ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]	SP	12/27/2023	P	\$1,001 - \$15,000	
SFP/MMLIS IRA - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	12/28/2023	P	\$1,001 - \$15,000	
SFP/MMLIS IRA - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	12/28/2023	P	\$1,001 - \$15,000	
SFP/MMLIS IRA - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	12/28/2023	P	\$15,001 - \$50,000	
SFP/MMLIS IRA - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]	SP	12/28/2023	P	\$15,001 - \$50,000	
SFP/MMLIS Roth IRA - JA ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]		03/21/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]		07/24/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]		10/23/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]		07/24/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		01/13/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		10/23/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		01/13/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		10/23/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		07/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		10/23/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		03/21/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		07/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		10/23/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]		10/23/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]		01/13/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	02/16/2023	P	\$15,001 - \$50,000	
SFP/MMLIS Roth IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	11/21/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	12/27/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Roth IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	02/17/2023	P	\$15,001 - \$50,000	
SFP/MMLIS Roth IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	12/28/2023	P	\$15,001 - \$50,000	
SFP/MMLIS Roth IRA - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	12/28/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - MG ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]	SP	12/27/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - MG ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]	SP	02/16/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	12/28/2023	P	\$15,001 - \$50,000	
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	02/17/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	02/17/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	12/28/2023	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	12/28/2023	P	\$15,001 - \$50,000	
SFP/MMLIS Roth IRA - MG ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	SP	02/17/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>

* 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
Bain & Company	Spouse Salary	N/A
State Street Bank & Trust	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Metro Credit Union	2018	Mortgage primary residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Co-chair	Massachusetts STEM Advisory Council

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 INVESTMENT VEHICLE DETAILS

- o 529 DC1 (Owner: DC)
LOCATION: MA
- o 529 DC2 (Owner: DC)
LOCATION: MA
- o 529 DC3 (Owner: DC)
LOCATION: MA
- o Bain 401k (Owner: SP)
- o SFP/MMLIS Individual Acct - DC1 (Owner: DC)
LOCATION: US
- o SFP/MMLIS Individual Acct - DC2 (Owner: DC)
LOCATION: US
- o SFP/MMLIS Individual Acct - DC3 (Owner: DC)
LOCATION: US
- o SFP/MMLIS Individual Acct - JA
LOCATION: US

- SFP/MMLIS Individual Acct - MG (Owner: SP)
LOCATION: US
- SFP/MMLIS IRA - MG (Owner: SP)
- SFP/MMLIS Roth IRA - JA
- SFP/MMLIS Roth IRA - MG (Owner: SP)

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. Jake Auchincloss , 05/3/2024