



Filing ID #10059414

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Rebecca 'Becca' Balint
Status: Member
State/District: VT00

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Arc Benders Circus Opera LLC [OL] LOCATION: Brattleboro, VT, US DESCRIPTION: Consulting services	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Bank Deposit Sweep Program [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Boston Trust Midcap Fund (BTMFX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Calvert Conservative Allocation Fund Class I (CFAIX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Calvert Emerging Markets Equity Fund Class I (CVMIX) [MF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Calvert Flexible Bond Fund Class I (CUBIX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Calvert Short Duration Income Fund Class I (CDSIX) [MF] DESCRIPTION: Overall loss in 2023	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Balint & Wohl- Joint WROS ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Ecofin Global Renewables Infrastructure Fund Institutional Class (ECOIX) [MF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Fidelity Money Market Fund: Premium Class (FZDXX) [MF]	JT	None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Invesco Floating Rate ESG Fund Class Y (AFRYX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ iShares USD Green Bond ETF (BGRN) [EF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Neuberger Berman Core Bond Institutional Class (NCRLX) [MF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Praxis Value Index Fund, Class A Shares (MVIAX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ TCW New America Premier Equities Fund - N Class (TGUNX) [MF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Trillium ESG Global Equity Fund Investor (PORTX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Brattleboro Savings & Loan [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
DC 1 Education Trust ⇒ American Beacon Small Cap Value Fd Inst Cl (AVFIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 1 Education Trust ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DC 1 Education Trust ⇒ Eaton Vance Income Fd of Boston Insti Shs (EIBIX) [MF] DESCRIPTION: Partial sale less than \$1,000	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 1 Education Trust ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF] DESCRIPTION: Overall loss in 2023	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DC 1 Education Trust ⇒ John Hancock Fds III Disciplined Value Fund Class I (JVLIX) [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DC 1 Education Trust ⇒ JPMorgan Core Bond Fund I Class (WOBDX) [MF] DESCRIPTION: Overall loss in 2023	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DC 1 Education Trust ⇒ MFS Growth Fund Class I (MFEIX) [MF]	DC	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DC 1 Education Trust ⇒ MFS Mid Cap Value Fund - Class I (MCVIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 1 Education Trust ⇒ T. Rowe Price Overseas Stock Fund - I Class (TROIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DC 1 Education Trust ⇒ Touchstone Mid Cap Growth Class Y (TEGYX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DC 1 Education Trust ⇒ Victory Trivalent International Small-Cap CL I (MISIX) [MF] DESCRIPTION: Partial sale less than \$1,000	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 1 Education Trust ⇒ Wasatch Small Cap Growth Fund Instl Cl (WIAEX) [MF] DESCRIPTION: Partial sale less than \$1,000	DC	\$1 - \$1,000	None		<input type="checkbox"/>
DC 2 Education Trust ⇒ American Beacon Small Cap Value Fd Inst Cl (AVFIX) [MF] DESCRIPTION: Partial sale less than \$1,000	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 2 Education Trust ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DC 2 Education Trust ⇒ Eaton Vance Income Fd of Boston Insti Shs (EIBIX) [MF]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 2 Education Trust ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Overall loss in 2023					
DC 2 Education Trust ⇒ John Hancock Fds III Disciplined Value Fund Class I (JVLIX) [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DC 2 Education Trust ⇒ JPMorgan Core Bond Fund I Class (WOBDX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Overall loss in 2023					
DC 2 Education Trust ⇒ MFS Growth Fund Class I (MFEIX) [MF]	DC	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DC 2 Education Trust ⇒ MFS Mid Cap Value Fund - Class I (MCVIX) [MF]	DC	\$1 - \$1,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Partial sales less than \$1,000					
DC 2 Education Trust ⇒ T. Rowe Price Overseas Stock Fund - I Class (TROIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DC 2 Education Trust ⇒ Touchstone Mid Cap Growth Class Y (TEGYX) [MF]	DC	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Partial sale less than \$1,000					
DC 2 Education Trust ⇒ Victory Trivalent International Small-Cap CL I (MISIX) [MF]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Partial sale less than \$1,000					
DC 2 Education Trust ⇒ Wasatch Small Cap Growth Fund Instl Cl (WIAEX) [MF]	DC	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Partial sale less than \$1,000					
Elizabeth Wohl IRA ⇒ Advisory Retirement Sweep Program [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Boston Trust Midcap Fund (BTMTX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Calvert Conservative Allocation Fund Class I (CFAIX) [MF]					
Elizabeth Wohl IRA ⇒ Calvert Emerging Markets Equity Fund Class I (CVMIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ Calvert Flexible Bond Fund Class I (CUBIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Ecofin Global Renewables Infrastructure Fund Institutional Class (ECOIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ Invesco Floating Rate ESG Fund Class Y (AFRYX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ iShares USD Green Bond ETF (BGRN) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Neuberger Berman Core Bond Institutional Class (NCRLX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ Praxis Value Index Fund, Class A Shares (MVIAX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ TCW New America Premier Equities Fund - N Class (TGUNX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Trillium ESG Global Equity Fund Investor (PORTX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Boston Trust Walden Small Cap Fund (BOSOX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Elizabeth Wohl Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Calvert Green Bond Fund Class I (CGBIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Calvert U.S. Large Cap Value Responsible Index Fund Class I (CFJIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Hartford Schrodgers Emerging Markets Equity Fund Class Y (HHHYX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Parnassus Mid Cap Fund - Institutional Shares (PFPMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ PIMCO Low Duration ESG Fund Institutional Class (PLDIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ RBC BlueBay High Yield Bond Fund Class I (RGHYX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ TIAA-CREF Core Impact Bond Instl (TSBIX) [OT] DESCRIPTION: Mutual Fund	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity Inc. 401k ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint IRA ⇒ Fidelity Global ex U.S. Index Fund (FSGGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint IRA ⇒ Fidelity Large Cap Growth Index Fund (FSPGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rebecca Balint IRA ⇒ Fidelity Large Cap Value Index Fund (FLCOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rebecca Balint IRA ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint IRA ⇒ Fidelity Small Cap Index Fund (FSSNX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint IRA ⇒ Fidelity U.S. Bond Index Fund (FXNAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Boston Trust Walden Small Cap Fund (BOSOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Calvert Green Bond Fund Class I (CGBIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Calvert U.S. Large Cap Value Responsible Index Fund Class I (CFJIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Hartford Schroders Emerging Markets Equity Fund Class Y (HHHYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Parnassus Mid Cap Fund - Institutional Shares (PFPMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ PIMCO Low Duration ESG Fund Institutional Class (PLDIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rebecca Balint Roth IRA ⇒ RBC BlueBay High Yield Bond Fund Class I (RGHYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rebecca Balint Roth IRA ⇒ TIAA-CREF Core Impact Bond Instl (TSBIX) [OT] DESCRIPTION: Mutual Fund		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
The Girl in the Yellow Pantsuit: Essays on Politics, History, and Culture [IP]		Undetermined	Royalties	\$5,001 - \$15,000	<input type="checkbox"/>
Vermont State Teachers Pension [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
VHEIP 529 Plan ⇒ Age 12-13 [5F] LOCATION: VT	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
VHEIP 529 Plan ⇒ Age 16 [5F] LOCATION: VT	SP	\$15,001 - \$50,000	Tax-Deferred		<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?
Balint & Wohl- Joint WROS ⇒ Calvert Short Duration Income Fund Class I (CDSIX) [MF]	JT	11/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Calvert Short Duration Income Fund Class I (CDSIX) [MF]	JT	05/1/2023	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Neuberger Berman Core Bond Institutional Class (NCRLX) [MF]	JT	11/1/2023	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ TCW New America Premier Equities Fund - N Class (TGUNX) [MF]	JT	11/1/2023	P	\$1,001 - \$15,000	
DC 1 Education Trust ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]	DC	11/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DC 1 Education Trust ⇒ John Hancock Fds III Disciplined Value Fund Class I (JVLIX) [MF]	DC	11/20/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DC 1 Education Trust ⇒ JPMorgan Core Bond Fund I Class (WOBDX) [MF]	DC	11/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DC 1 Education Trust ⇒ MFS Growth Fund Class I (MFEIX) [MF]	DC	11/20/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DC 1 Education Trust ⇒ T. Rowe Price Overseas Stock Fund - I Class (TROIX) [MF]	DC	11/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DC 2 Education Trust ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]	DC	11/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DC 2 Education Trust ⇒ John Hancock Fds III Disciplined Value Fund Class I (JVLIX) [MF]	DC	11/20/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DC 2 Education Trust ⇒ John Hancock Fds III Disciplined Value Fund Class I (JVLIX) [MF]	DC	05/22/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DC 2 Education Trust ⇒ JPMorgan Core Bond Fund I Class (WOBDX) [MF]	DC	11/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DC 2 Education Trust ⇒ MFS Growth Fund Class I (MFEIX) [MF]	DC	05/22/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DC 2 Education Trust ⇒ T. Rowe Price Overseas Stock Fund - I Class (TROIX) [MF]	DC	11/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DC 2 Education Trust ⇒ T. Rowe Price Overseas Stock Fund - I Class (TROIX) [MF]	DC	05/22/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Boston Trust Midcap Fund (BTMFX) [MF]	SP	12/13/2023	P	\$1,001 - \$15,000	
Elizabeth Wohl IRA ⇒ Calvert Emerging Markets Equity Fund Class I (CVMIX) [MF]	SP	11/1/2023	P	\$1,001 - \$15,000	
Elizabeth Wohl IRA ⇒ Calvert Short Duration Income Fund Class I (CDSIX) [MF]	SP	11/1/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Elizabeth Wohl IRA ⇒ Ecofin Global Renewables Infrastructure Fund Institutional Class (ECOIX) [MF]	SP	11/1/2023	P	\$1,001 - \$15,000	
Elizabeth Wohl IRA ⇒ Neuberger Berman Core Bond Institutional Class (NCRLX) [MF]	SP	11/1/2023	P	\$15,001 - \$50,000	
Elizabeth Wohl IRA ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]	SP	11/16/2023	P	\$1,001 - \$15,000	
Elizabeth Wohl IRA ⇒ Praxis Value Index Fund, Class A Shares (MVIAX) [MF]	SP	12/18/2023	P	\$1,001 - \$15,000	
Elizabeth Wohl IRA ⇒ Trillium ESG Global Equity Fund Investor (PORTX) [MF]	SP	12/13/2023	P	\$1,001 - \$15,000	
Elizabeth Wohl Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	03/13/2023	P	\$1,001 - \$15,000	
Elizabeth Wohl Roth IRA ⇒ Impax High Yield Bond Fund Institutional Class (PXHIX) [MF]	SP	08/7/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	03/13/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ RBC BlueBay High Yield Bond Fund Class I (RGHYX) [MF]	SP	08/7/2023	P	\$1,001 - \$15,000	
Elizabeth Wohl Roth IRA ⇒ TIAA-CREF Core Impact Bond Instl (TSBIX) [OT]	SP	08/7/2023	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: Mutual Fund					
Rebecca Balint IRA ⇒ Fidelity Large Cap Growth Index Fund (FSPGX) [MF]		04/4/2023	P	\$1,001 - \$15,000	
Rebecca Balint IRA ⇒ Fidelity Large Cap Value Index Fund (FLCOX) [MF]		04/4/2023	P	\$1,001 - \$15,000	
Rebecca Balint IRA ⇒		04/4/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity U.S. Bond Index Fund (FXNAX) [MF]					
Rebecca Balint Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]		03/13/2023	P	\$1,001 - \$15,000	
Rebecca Balint Roth IRA ⇒ Impax High Yield Bond Fund Institutional Class (PXHIX) [MF]		08/7/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		03/13/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		03/13/2023	P	\$1,001 - \$15,000	
Rebecca Balint Roth IRA ⇒ RBC BlueBay High Yield Bond Fund Class I (RGHYX) [MF]		08/7/2023	P	\$1,001 - \$15,000	
Rebecca Balint Roth IRA ⇒ TIAA-CREF Core Impact Bond Instl (TSBIX) [OT]		08/7/2023	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: Mutual Fund					

* 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
Downs Rachlin Martin PLLC	Spouse Salary	N/A
Brattleboro Retreat	Spouse Salary	N/A
Arc Benders Circus Opera LLC	Spouse self-employment income	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2019	Vermont State Teachers' Retirement System	Defined benefit plan that provides service retirement benefits.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation (AIEF)	08/5/2023	08/13/2023	Brattleboro, VT - Tel Aviv, Israel - Brattleboro, VT	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Balint & Wohl- Joint WROS (Owner: JT) LOCATION: USDC 1 Education Trust (Owner: DC)DC 2 Education Trust (Owner: DC)Elizabeth Wohl IRA (Owner: SP)Elizabeth Wohl Roth IRA (Owner: SP)Fidelity Inc. 401k (Owner: SP)Rebecca Balint IRARebecca Balint Roth IRAVHEIP 529 Plan (Owner: SP) LOCATION: VT DESCRIPTION: DC1VHEIP 529 Plan (Owner: SP) LOCATION: VT DESCRIPTION: DC2

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

COMMENTS

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. Rebecca 'Becca' Balint , 05/15/2024