



Filing ID #10061010

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. John W. Rose
Status: Member
State/District: TN06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 09/12/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-------------------------|----------------|--------------------|--------------------------|
| Anthem CityLine/Bay Capital Partners, LP, 1% Interest [OL] | | \$50,001 - \$100,000 | K-1, LP Income | None | <input type="checkbox"/> |
| LOCATION: Richardson, TX, US DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. | | | | | |
| Boson Holdings, LLC 401K Plan ⇒ American Funds 2030 TRGT Date Retire R2E RBEEEX [MF] | | \$500,001 - \$1,000,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investments held in company 401K and Roth 401K plan. 401K investments are managed by American Funds. | | | | | |
| Broad River/MP, LP, 1% Interest [OL] | | \$50,001 - \$100,000 | K-1, LP Income | \$5,001 - \$15,000 | <input type="checkbox"/> |
| LOCATION: Beaufort, SC, US DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a loss for the year. | | | | | |
| Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Azora at Cypress Ranch, 15% Interest [OL] | | \$50,001 - \$100,000 | K-1, LP Income | \$201 - \$1,000 | <input type="checkbox"/> |
| LOCATION: Lutz (Tampa MSA), FL, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-------------------------|----------------|-------------------|--------------------------|
| Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Brookleigh Flats, 16% Interest [OL] | | \$50,001 - \$100,000 | K-1, LP Income | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Atlanta, GA, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. | | | | | |
| Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Duet, 10% Interest [OL] | | \$15,001 - \$50,000 | K-1, LP Income | \$201 - \$1,000 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. | | | | | |
| Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Gibson Flowery Branch, 12% Interest [OL] | | \$15,001 - \$50,000 | K-1, LP Income | \$201 - \$1,000 | <input type="checkbox"/> |
| LOCATION: Atlanta, GA, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. | | | | | |
| Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Note 16, 4% Interest [OL] | | \$15,001 - \$50,000 | K-1, LP Income | \$201 - \$1,000 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. | | | | | |
| Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ The Artessa, 14% Interest [OL] | | \$50,001 - \$100,000 | K-1, LP Income | \$201 - \$1,000 | <input type="checkbox"/> |
| LOCATION: Franklin, TN, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. | | | | | |
| Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ The Collins, 14% Interest [OL] | | \$50,001 - \$100,000 | K-1, LP Income | \$201 - \$1,000 | <input type="checkbox"/> |
| LOCATION: Charlotte, NC, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. | | | | | |
| Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ The Edge, 16% Interest [OL] | | \$50,001 - \$100,000 | K-1, LP Income | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Atlanta, GA, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-------------------------|-------------------------------|---------------------|-------------------------------------|
| to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. | | | | | |
| Chelsea Brooke Rose IRA ⇒ JPMorgan Investor Growth Fund CL C M/F [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Mutual fund held within wife's IRA. | | | | | |
| Chelsea Brooke Rose IRA ⇒ Raymond James Bank Deposit Program [BA] | SP | \$1 - \$1,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Money market portion of Wife's IRA account. | | | | | |
| CHIPS III AC, LP ⇒ Anthem CityLine, 33% Interest [OL] | | \$1,001 - \$15,000 | K-1, LP Income | \$1 - \$200 | <input type="checkbox"/> |
| LOCATION: Richardson, TX, US | | | | | |
| DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. | | | | | |
| CHIPS III AC, LP, 1% Interest [OL] | | \$15,001 - \$50,000 | Capital Gains, K-1, LP Income | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| DESCRIPTION: This represents the aggregate value of the investment in the LP. The amount of income represents the aggregate distributions from the LP for all assets in the associated Asset Class. The K-1 from this LP reflects a net loss for the year. | | | | | |
| CHIPS III AC, LP ⇒ Parc at Broad River, 36% Interest [OL] | | \$1,001 - \$15,000 | K-1, LP Income | \$201 - \$1,000 | <input type="checkbox"/> |
| LOCATION: Beaufort, SC, US | | | | | |
| DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. | | | | | |
| CHIPS III AC, LP ⇒ Whitepalm, 30% Interest [OL] | | \$1,001 - \$15,000 | K-1, LP Income | \$1 - \$200 | <input type="checkbox"/> |
| LOCATION: Port Orange, FL, US | | | | | |
| DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. | | | | | |
| Citizens Bank, Carthage, TN Accounts [BA] | | \$50,001 - \$100,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: Personal and farm operating, interest bearing checking accounts and checking account of spouse. | | | | | |
| Citizens Bank, Carthage, TN Stock [PS] | | \$500,001 - \$1,000,000 | Dividends | \$15,001 - \$50,000 | <input type="checkbox"/> |
| DESCRIPTION: Stock in community bank. | | | | | |
| Farm Trust [RP] | | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| LOCATION: DeKalb, TN, US | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|---------------------------|----------------|---------------------|--------------------------|
| DESCRIPTION: Beneficial owner of farm real estate held in trust. | | | | | |
| First Farmers and Merchants Corp., Columbia, TN Stock [PS] | | \$50,001 - \$100,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| DESCRIPTION: Stock in community bank. | | | | | |
| First Freedom Bancshares, Lebanon, TN Stock [PS] | | \$1,000,001 - \$5,000,000 | Dividends | None | <input type="checkbox"/> |
| DESCRIPTION: Stock in community bank. | | | | | |
| First Freedom Bank, Lebanon, TN Account [BA] | | \$1,000,001 - \$5,000,000 | Interest | \$15,001 - \$50,000 | <input type="checkbox"/> |
| DESCRIPTION: Personal money market account. | | | | | |
| First National Bank of Tennessee, Livingston, TN Accounts [BA] | | \$100,001 - \$250,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: Personal interest bearing checking account and personal savings account of dependent child. | | | | | |
| Heyward/HK, LP, 1% Interest [OL] | | \$50,001 - \$100,000 | K-1, LP Income | \$5,001 - \$15,000 | <input type="checkbox"/> |
| LOCATION: Charleston, SC, US | | | | | |
| DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a lower net income for the year. This property was acquired through a 1031 tax deferred exchange during 2021 upon the sale of Hunter's Creek Apartments, LP and Lofts at Savannah Park. | | | | | |
| John Rose for Tennessee Campaign Loan, Cookeville, TN [DO] | | \$1,000,001 - \$5,000,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: Loan to John Rose for Tennessee campaign for Tennessee's 6th District seat in the United States House of Representatives. No interest is presently being charged. | | | | | |
| John Williams Rose RIRA ⇒ AB Relative Value Fund Class A M/F [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ Bank of America Corporation (BAC) [ST] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ Coherent Corp. (COHR) [ST] | | \$1 - \$1,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ Fidelity Advisor Small Cap Fund Class M M/F [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-----------------------|----------------|-------------|--------------------------|
| John Williams Rose RIRA ⇒ FIMM Money Market (FNSXX) [BA] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Money market funds within RIRA. | | | | | |
| John Williams Rose RIRA ⇒ Invesco EQV International Equity Fund Class A [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ INVESCO Income Advantage U.S. Fund Class A [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ Massachusetts Investors Growth Stock Fund Class C M/F [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ MFS Growth Fund Class A M/F [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ MFS Mid Cap Growth Fund Class C M/F [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ Microsoft Corporation (MSFT) [ST] | | \$250,001 - \$500,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ Raymond James Bank Deposit Program [BA] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ Thornburg Small Mid Cap Core Fund (TVAFX) [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| John Williams Rose RIRA ⇒ VOC Energy Trust Units of Beneficial Interest (VOC) [ST] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Investment held in personal Roth IRA Account. | | | | | |
| Nationwide Life Insurance Whole Life Policy [WU] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: Cash surrender value of whole life policy on the life of John W. Rose. | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-------------------------|--------------------------|---------------------|--------------------------|
| Pavilion Land Partnership, LP, 1% Interest [OL] | | \$1,001 - \$15,000 | K-1, LP Income | None | <input type="checkbox"/> |
| LOCATION: Columbia, SC, US DESCRIPTION: Limited partner in entity that owns undeveloped land in Columbia, SC. There was no income from this partnership for the year. The K-1 from this LP reflects no net income for the year. | | | | | |
| Pinnacle National Bank, Nashville, TN Account [BA] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: Personal money market account. | | | | | |
| Raymond James Brokerage Account ⇒ Alphabet Inc. - Class A (GOOGL) [ST] | | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| Raymond James Brokerage Account ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST] | | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| Raymond James Brokerage Account ⇒ AMCAP Fund Class A-American Funds M/F [MF] | | \$500,001 - \$1,000,000 | Capital Gains, Dividends | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Raymond James Brokerage Account ⇒ Capital World Growth & Income Fund Class A-American FD M/F [MF] | | \$250,001 - \$500,000 | Dividends | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Brokerage Account ⇒ Europacific Growth Fund Class A-American Funds M/F [MF] | | \$250,001 - \$500,000 | Dividends | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Brokerage Account ⇒ FIMM Money Market (FNSXX) [BA] | | \$15,001 - \$50,000 | Interest | \$201 - \$1,000 | <input type="checkbox"/> |
| DESCRIPTION: Money market funds in brokerage account. | | | | | |
| Raymond James Brokerage Account ⇒ Growth Fund of America Class A-American Funds M/F [MF] | | \$500,001 - \$1,000,000 | Capital Gains, Dividends | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Raymond James Brokerage Account ⇒ Investment Company of America Class A-American Funds M/F [MF] | | \$250,001 - \$500,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Raymond James Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST] | | \$500,001 - \$1,000,000 | Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Raymond James Brokerage Account ⇒ Raymond James Client Interest Program [BA] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Raymond James Brokerage Account ⇒ | | \$250,001 - | Capital Gains, | \$2,501 - \$5,000 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|----------------------------|--------------------|-------------------------|--------------------------|
| Smallcap World Fund Class A-American Funds M/F [MF] | | \$500,000 | Dividends | | <input type="checkbox"/> |
| Rose Farm, 100% Interest [FA] | | \$5,000,001 - \$25,000,000 | Farm Income | \$50,001 - \$100,000 | <input type="checkbox"/> |
| LOCATION: DeKalb / Smith / Putnam, TN, US | | | | | |
| DESCRIPTION: The farm incurred a net loss in the reporting year. Income reported is gross revenue for the calendar year. | | | | | |
| Smith Fork Ventures, Inc. Demand Note, Nashville, TN [DO] | | \$5,000,001 - \$25,000,000 | Interest | \$100,001 - \$1,000,000 | <input type="checkbox"/> |
| DESCRIPTION: Demand note to business. | | | | | |
| Smith Fork Ventures, Inc., Nashville, TN, 92% Interest [OL] | | \$5,000,001 - \$25,000,000 | K-1, S Corp Income | \$100,001 - \$1,000,000 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| DESCRIPTION: Smith Fork Ventures, Inc. wholly owns Boson Holdings, LLC which in turn wholly owns Boson Software, LLC and Boson Training, LLC. All of the Boson LLCs are disregarded entities for tax purposes. | | | | | |
| Sun Life Assurance Company Whole Life Policy [WU] | | \$500,001 - \$1,000,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: Cash surrender value of whole life policy on life of John W. Rose. | | | | | |
| Tennessee Farmers Assurance Co., Columbia, TN Stock [PS] | | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: Stock in Tennessee-based property and casualty insurance company affiliated with Tennessee Farm Bureau Federation. | | | | | |
| Tennessee Farmers Life Insurance Company Fixed Annuity [FN] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: Fixed annuity. | | | | | |
| Tennessee Farmers Life Insurance Company Universal Life Policy [WU] | | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: Cash surrender value of universal life policy on life of John W. Rose. | | | | | |
| Tennessee Farmers Life Insurance Co., Columbia, TN Stock [PS] | | \$250,001 - \$500,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: Stock in Tennessee-based life insurance company affiliated with the Tennessee Farm Bureau Federation. | | | | | |

* 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? |
|--|-------|------------|-------------|-------------------------|-------------------------------------|
| Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Carter-Haston Multifamily Value Fund V HNW, L.P., 1% Interest [OL] | | 08/28/2023 | P | \$50,001 - \$100,000 | |
| LOCATION: Nashville, TN, US DESCRIPTION: Capital call for investment commitment in multi-property limited partnership investing in multi-family residential properties. My ownership percentage of the limited partnership capital is 0.3549456%. | | | | | |
| CHIPS III AC, LP ⇒ Legacy at Wakefield, 1% Interest [OL] | | 08/11/2023 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| LOCATION: Raleigh, NC, US DESCRIPTION: Limited partnership sold interest in multi-family residential development resulting in a net capital gain. | | | | | |
| Conger/Green Farm [FA] | | 07/18/2023 | E | \$500,001 - \$1,000,000 | |
| LOCATION: DeKalb, TN, US DESCRIPTION: This 235 acres was acquired via a Deed in Lieu of Foreclosure in satisfaction of the Danny Conger Farm Note. | | | | | |
| Harper's Point Land Partnership, LP, 9% Interest [OI] | | 08/28/2023 | S (partial) | \$100,001 - \$250,000 | <input checked="" type="checkbox"/> |
| DESCRIPTION: Limited partnership sold interest in undeveloped land in Murfreesboro, TN resulting in a net capital gain. Final distribution of proceeds to occur in 2024. | | | | | |
| Legacy at Wakefield/HF, LP, 1% Interest [OL] | | 07/28/2023 | S (partial) | \$100,001 - \$250,000 | <input checked="" type="checkbox"/> |
| LOCATION: Raleigh, NC, US DESCRIPTION: Limited partnership sold interest in multi-family residential development resulting in a net capital gain. Final distribution of proceeds to occur in 2024. | | | | | |

* 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 |
|--------------------------------|----------------------|--------|
| Tennessee FFA Foundation, Inc. | Spouses compensation | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|----------|---------------|--------------------------------|---------------------|
| | Discover | 2023 | Monthly balance on credit card | \$15,001 - \$50,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|-----------------------------|--|
| Director | Tennessee Technological University Foundation, Inc. (TN Nonprofit) |
| Director | Tech Farms, LLC (TN Nonprofit LLC) |
| Limited Partner | Carter-Haston Investment Partners III AC, LP |
| Limited Partner | Bay Capital Partners, LP |
| Limited Partner | Harper's Point Land Partnership, LP |
| Limited Partner | Legacy at Wakefield/HF, LP |
| Limited Partner | Pavilion Land Partnership, LP |
| President | Smith Fork Ventures, Inc. |
| Limited Partner | Broad River/MP, LP |
| Sponsoring Committee Member | Tennessee Future Farmers of America Foundation, Inc. |
| Limited Partner | Heyward/HK, LP |
| Limited Partner | Carter-Haston Multifamily Value Fund V HNW, L.P. |

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

- Boson Holdings, LLC 401K Plan
DESCRIPTION: Boson Holdings, LLC is a single member LLC and wholly owned by Smith Fork Ventures, Inc. The 401k plan investments are managed by American Funds.
- Carter-Haston Multifamily Value Fund V HNW, L.P. (1% Interest)
LOCATION: Nashville, Davidson, TN, US
DESCRIPTION: Ownership % of capital is 0.3556492% of Limited Partnership.

- Chelsea Brooke Rose IRA (Owner: SP)
DESCRIPTION: Raymond James Financial Services IRA of wife.
- CHIPS III AC, LP (1% Interest)
LOCATION: Nashville, TN, US
DESCRIPTION: Ownership % is 0.432%.
- John Williams Rose RIRA
DESCRIPTION: Raymond James Financial Services Roth IRA account.
- Raymond James Brokerage Account (100% Interest)
LOCATION: Nashville, TN, US
DESCRIPTION: John Williams Rose Brokerage Account.

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. John W. Rose , 09/12/2024