



FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Mark Dr Green
Status: Member
State/District: TN07

FILING INFORMATION

Filing Type: Annual Report
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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|----------------------------|-----------------|-------------------------|--------------------------|
| 5 Stones Consulting [OL] | JT | \$250,001 - \$500,000 | Boarding Horses | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Ashland City, Montgomery Co, TN, US DESCRIPTION: This is the entity through which our horse boarding operations are conducted. | | | | | |
| A Night With Saddam published by Lulu Press [IP] | | \$1,001 - \$15,000 | Royalties | \$1 - \$200 | <input type="checkbox"/> |
| Alianz Master Dex F Fixed Annuity [FN] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| Authentically American Apparel [PS] | SP | \$250,001 - \$500,000 | Dividends | None | <input type="checkbox"/> |
| DESCRIPTION: Apparel company in Brentwood, TN. | | | | | |
| Birch Creek Properties ⇒ 813 NPB [RP] | JT | \$5,000,001 - \$25,000,000 | Rent | \$100,001 - \$1,000,000 | <input type="checkbox"/> |
| LOCATION: North Palm Beach, , FL, US | | | | | |
| Birch Creek Properties ⇒ Loans from Birch Creek to Colson Services [DO] | JT | \$500,001 - \$1,000,000 | Interest, Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Birch Creek Properties ⇒ Rental Property [RP] | JT | \$250,001 - \$500,000 | Rent | \$5,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|--------------|-----------------------|-----------------------|--------------------|-------------------------------------|
| LOCATION: Ashland City, Montgomery Co, TN, US | | | | | |
| Birch Creek Properties ⇒ Westchester Properties [RE] | JT | \$250,001 - \$500,000 | Rent | \$5,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: Rental properties in Nashville, TN. | | | | | |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Capitol [RP] | JT | \$100,001 - \$250,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Carter [RP] | JT | \$50,001 - \$100,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Meadow [RP] | JT | None | None | | <input checked="" type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Neelys' 1 [RP] | JT | \$15,001 - \$50,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Neelys 2 [RP] | JT | \$50,001 - \$100,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Anderson [RP] | JT | \$50,001 - \$100,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Granada [RP] | JT | \$100,001 - \$250,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Kenmore [RP] | JT | \$100,001 - \$250,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Oakdale [RP] | JT | \$50,001 - \$100,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Oneida [RP] | JT | \$15,001 - \$50,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| LOCATION: Nashville, TN, US | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|---------------------------|--------------------------|-------------------------|-------------------------------------|
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Porter [RP] LOCATION: Nashville, TN, US | JT | \$100,001 - \$250,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Richmond Hill [RP] LOCATION: Nashville, TN, US | JT | \$15,001 - \$50,000 | Rent | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property Westchester [RP] LOCATION: Nashville, TN, US | JT | None | None | | <input checked="" type="checkbox"/> |
| BMC Capital [PS] DESCRIPTION: Precious Metals, Rare Coin Dealership | SP | \$50,001 - \$100,000 | None | | <input checked="" type="checkbox"/> |
| Brokerage Cash Account Equitable Advisors [OT] DESCRIPTION: This is a cash account used as my broker buys and sells stock and other assets for me. | | \$1,000,001 - \$5,000,000 | Interest | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Carbon Rivers Inc. [PS] DESCRIPTION: Spousal purchase of non-traded stock | SP | \$250,001 - \$500,000 | None | | <input checked="" type="checkbox"/> |
| Dia-Tech Oncology [PS] DESCRIPTION: Oncology services in Franklin, TN. | | \$15,001 - \$50,000 | Dividends | None | <input type="checkbox"/> |
| Equitable Advisors Investment Account ⇒ Energy Transfer LP Common Units (ET) [ST] | JT | None | Capital Gains, Dividends | \$100,001 - \$1,000,000 | <input checked="" type="checkbox"/> |
| Equitable Advisors Investment Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | None | Capital Gains, Dividends | \$100,001 - \$1,000,000 | <input checked="" type="checkbox"/> |
| Equitable Advisors Investment Account ⇒ NGL ENERGY PARTNERS LP Common Units representing Limited Partner Interests (NGL) [ST] | JT | \$1,000,001 - \$5,000,000 | None | | <input checked="" type="checkbox"/> |
| Equitable Advisors Investment Account ⇒ NGL ENERGY PARTNERS LP Common Units representing Limited Partner Interests (NGL) [ST] | | \$500,001 - \$1,000,000 | Capital Gains, Dividends | None | <input checked="" type="checkbox"/> |
| Equitable Advisors Investment Account ⇒ US Bank N.A. Cash [BA] | | \$1,001 - \$15,000 | Interest | \$201 - \$1,000 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|----------------|-----------------|-------------------------------------|
| Equitable Retirement Account ⇒ ACWV MSCI GLOBAL MIN VOL ETF [EF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ AXA IRA Cash Account [IH] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ ESCJX Essex Small Cap Growth [EF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ ITOT CORE S&P TOTAL STOCK MARKET ETF [EF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ QUAYX AB Small CAP Growth Advisor CL [MF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ SPDW PORTFOLIO DEV WORLD EX-US ETF [EF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ TNBIX Smart Beta Equity Class I [MF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ TNHIX High Yield Bond Class I [MF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ TNUIX Diversified Bond CL I [MF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ TNVIX GAMCO Small Mid Cap Value CL I [MF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Vanguard Intermediate-Term Corporate Bond ETF [EF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ VVO Vanguard FTSE Emerging MKTS ETF [EF] | | None | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Franklin Conservative Allocation FD CL B [MF] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Gold [CO] | | \$250,001 - \$500,000 | Capital Gains | None | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|---------------------------|----------------|-------------------|--------------------------|
| Hytch [DO] | SP | \$250,001 - \$500,000 | Dividends | None | <input type="checkbox"/> |
| DESCRIPTION: Hytch is a ride sharing ap with its headquarters in Nashville, TN | | | | | |
| IRA Innovations Self Directed IRA ⇒ Cash Account [IH] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| IRA Innovations Self Directed IRA ⇒ Note Receivable from Colson Services [DO] | | \$100,001 - \$250,000 | Tax-Deferred | | <input type="checkbox"/> |
| Loan to APP Hold Co [DO] | | None | None | | <input type="checkbox"/> |
| Midland Fixed Annuity IRA [FN] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| New Day Diagnostics [PS] | SP | \$250,001 - \$500,000 | Dividends | None | <input type="checkbox"/> |
| DESCRIPTION: Medical laboratory in Knoxville, TN. | | | | | |
| Rare Coins [CO] | JT | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| Residence in DC [RP] | JT | \$1,000,001 - \$5,000,000 | None | | <input type="checkbox"/> |
| LOCATION: Washington, DC, US | | | | | |
| Silver [CO] | | \$15,001 - \$50,000 | Capital Gains | None | <input type="checkbox"/> |
| State Farm Annuity [FN] | | \$250,001 - \$500,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| State of TN 401(k) ⇒ Brown Capital Small Company Inv [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 401(k) ⇒ Columbia Select MidCap [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 401(k) ⇒ DFA International Value I [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 401(k) ⇒ Fidelity International Discovery [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|--------------|----------------------------|-----------------------|---------------|--------------------------|
| State of TN 401(k) ⇒ Fidelity Puritan [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 401(k) ⇒ Franklin Small Cap Value [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 401(k) ⇒ Tennessee Value Select [MF] | | \$1 - \$1,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 401(k) ⇒ Vanguard Institutional Index I [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 401(k) ⇒ Vanguard Total Bond Market Index Inst [MF] | | None | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 401(k) ⇒ Vanguard Total Bond MKT Index PLS [MF] | | \$1 - \$1,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 401(k) ⇒ Virtus NFJ Large Cap Value Instl [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 457 Plan ⇒ Brown Capital Small Company Inv [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 457 Plan ⇒ Columbia Mid Cap Value Instl [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 457 Plan ⇒ Fidelity International Discovery [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN 457 Plan ⇒ Virtus NFJ Large Cap Value Instl [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of TN Consolidated Retirement System [FN] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| TN Personal Residence and Farm HOR [RP] | JT | \$5,000,001 - \$25,000,000 | None | | <input type="checkbox"/> |
| LOCATION: Ashland City, Montgomery Co, TN, US | | | | | |

* 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? |
|---|-------|------------|----------|-----------------------|--------------------------|
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Meadow [RP] LOCATION: Nashville, TN, US | JT | 03/31/2022 | S | \$50,001 - \$100,000 | <input type="checkbox"/> |
| Birch Creek Properties ⇒ Westchester Properties ⇒ Property - Westchester [RP] LOCATION: Nashville, TN, US | JT | 10/13/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| BMC Capital [PS] LOCATION: US DESCRIPTION: Precious Metals, Rare Coin Dealership | SP | 08/14/2023 | P | \$15,001 - \$50,000 | |
| Carbon Rivers Inc [PS] DESCRIPTION: Spousal purchase of non traded stock | SP | 08/6/2023 | P | \$250,001 - \$500,000 | |
| Equitable Retirement Account ⇒ 1290 Diversified Bond Fund Class I (TNUIX) [MF] | | 01/6/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ 1290 Essex Small Cap Growth Fund - Class I (ESCJX) [MF] | | 01/6/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ 1290 GAMCO Small/Mid Cap Value Fund Class I (TNVIX) [MF] | | 01/6/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ 1290 High Yield Bond Fund Class I (TNHIX) [MF] | | 01/6/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ 1290 SmartBeta Equity Fund Class I (TNBIX) [MF] | | 01/6/2023 | S | \$50,001 - \$100,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ AB Cap Fund, Inc. - AB Small Cap Growth Portfolio - Advisor Class (QUAYX) [MF] | | 01/6/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Allspring Diversified Income Builder Fund Insti (EKSYX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ | | 11/20/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|----------|-----------------------|-------------------------------------|
| Allspring Diversified Income Builder Fund Insti (EKSYX) [MF] | | | | | |
| Equitable Retirement Account ⇒ BlackRock Funds II, BlackRock Multi-Asset Income Ptf Insti (BIICX) [MF] | | 01/6/2023 | P | \$15,001 - \$50,000 | |
| Equitable Retirement Account ⇒ BlackRock Funds II, BlackRock Multi-Asset Income Ptf Insti (BIICX) [MF] | | 11/20/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Columbia Select Large Cap Value Fund Class I (CSVZX) [MF] | | 01/6/2023 | P | \$15,001 - \$50,000 | |
| Equitable Retirement Account ⇒ Columbia Select Large Cap Value Fund Class I (CSVZX) [MF] | | 04/19/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ DoubleLine Total Return Bond Fund Class I (DBLTX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ DoubleLine Total Return Bond Fund Class I (DBLTX) [MF] | | 11/20/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 01/23/2023 | S | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 01/26/2023 | S | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 02/16/2023 | S | \$50,001 - \$100,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 03/24/2023 | S | \$100,001 - \$250,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 04/10/2023 | S | \$50,001 - \$100,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 05/17/2023 | S | \$50,001 - \$100,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 05/17/2023 | S | \$50,001 - \$100,000 | <input checked="" type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|-------------|-----------------------|-------------------------------------|
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 05/30/2023 | S | \$50,001 - \$100,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 06/2/2023 | S | \$100,001 - \$250,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 06/8/2023 | S | \$100,001 - \$250,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 06/26/2023 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 06/27/2023 | S | \$250,001 - \$500,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 06/27/2023 | S | \$250,001 - \$500,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 07/14/2023 | S | \$100,001 - \$250,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 07/18/2023 | S | \$100,001 - \$250,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 08/4/2023 | S | \$250,001 - \$500,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 12/6/2023 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 11/20/2023 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Energy Transfer LP Common Units (ET) [ST] | | 04/28/2023 | S (partial) | \$50,001 - \$100,000 | <input checked="" type="checkbox"/> |
| Equitable Retirement Account ⇒ Federated Hermes Strategic Value Dividend Fund Class IS (SVAIX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ Federated Hermes Strategic Value Dividend Fund Class IS (SVAIX) [MF] | | 04/19/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------------|---------------------|--------------------------|
| Equitable Retirement Account ⇒ Harbor Capital Appreciation Fund Insti Cl (HACAX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ Harbor Capital Appreciation Fund Insti Cl (HACAX) [MF] | | 11/20/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF] | | 01/4/2023 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF] | | 01/6/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF] | | 01/6/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ iShares MSCI Global Min Vol Factor ETF (ACWV) [EF] | | 01/6/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Loomis Sayles Funds - Growth Fund Class Y (LSGRX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ Loomis Sayles Funds - Growth Fund Class Y (LSGRX) [MF] | | 07/11/2023 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Loomis Sayles Funds - Growth Fund Class Y (LSGRX) [MF] | | 11/20/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ MainStay Epoch Global Equity Yield Fund Class I (EPSYX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ MainStay Epoch Global Equity Yield Fund Class I (EPSYX) [MF] | | 11/20/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ MFS Value Fund - Class I (MEIIX) [MF] | | 01/6/2023 | P | \$15,001 - \$50,000 | |
| Equitable Retirement Account ⇒ MFS Value Fund - Class I (MEIIX) [MF] | | 11/20/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ NGL ENERGY PARTNERS LP Common Units representing | | 01/3/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------|--------------------------|--------------------------|
| Limited Partner Interests (NGL) [ST] | | | | | |
| Equitable Retirement Account ⇒ NGL ENERGY PARTNERS LP Common Units representing Limited Partner Interests (NGL) [ST] | | 03/24/2023 | P | \$100,001 - \$250,000 | |
| Equitable Retirement Account ⇒ NGL ENERGY PARTNERS LP Common Units representing Limited Partner Interests (NGL) [ST] | | 05/17/2023 | P | \$50,001 - \$100,000 | |
| Equitable Retirement Account ⇒ NGL ENERGY PARTNERS LP Common Units representing Limited Partner Interests (NGL) [ST] | | 06/2/2023 | P | \$100,001 - \$250,000 | |
| Equitable Retirement Account ⇒ NGL ENERGY PARTNERS LP Common Units representing Limited Partner Interests (NGL) [ST] | | 06/8/2023 | P | \$100,001 - \$250,000 | |
| Equitable Retirement Account ⇒ NGL ENERGY PARTNERS LP Common Units representing Limited Partner Interests (NGL) [ST] | | 08/4/2023 | P | \$250,001 - \$500,000 | |
| Equitable Retirement Account ⇒ Nuveen Dividend Growth Fund Class R (NSBRX) [MF] | | 04/19/2023 | P | \$15,001 - \$50,000 | |
| Equitable Retirement Account ⇒ Nuveen Dividend Growth Fund Class R (NSBRX) [MF] | | 11/20/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF] | | 04/19/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF] | | 11/20/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Pear Tree Polaris Foreign Value Small Cap Fund Insti Shs (QUSIX) [MF] | | 11/20/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Pear Tree Polaris Foreign Value Small Cap Fund Insti Shs (QUSIX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|----------|---------------------|--------------------------|
| Equitable Retirement Account ⇒ PIMCO Investment Grade Credit Bond Fund Class I-2 (PBDPX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ PIMCO Investment Grade Credit Bond Fund Class I-2 (PBDPX) [MF] | | 11/20/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Shelton Equity Income Fund - Direct Shares (EQTIX) [MF] | | 04/19/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ Shelton Equity Income Fund - Direct Shares (EQTIX) [MF] | | 11/20/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ SPDR Portfolio Developed World ex-US ETF (SPDW) [EF] | | 01/6/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ SPDR S&P 500 (SPY) [OP] DESCRIPTION: 13 SPY Puts strike price \$440 expire 1/19/2024 | | 07/11/2023 | P | \$15,001 - \$50,000 | |
| Equitable Retirement Account ⇒ SPDR S&P 500 (SPY) [OP] DESCRIPTION: sell of Jan 24 SPY 440 put | | 08/4/2023 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ The Hartford Equity Income Fund Class I (HQIIX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ The Hartford Equity Income Fund Class I (HQIIX) [MF] | | 11/20/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Undiscovered Managers Behavioral Value Fund I Class (UBVSX) [MF] | | 11/20/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Equitable Retirement Account ⇒ Undiscovered Managers Behavioral Value Fund I Class (UBVSX) [MF] | | 01/6/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF] | | 01/4/2023 | P | \$1,001 - \$15,000 | |
| Equitable Retirement Account ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF] | | 01/6/2023 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|-----------|----------|--------------------|--------------------------|
| Equitable Retirement Account ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF] | | 01/6/2023 | S | \$1,001 - \$15,000 | <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

None disclosed.

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|------------------------------|---------------|--|---------------------------|
| JT | Legends Bank | May 2020 | Personal loan. | \$500,001 - \$1,000,000 |
| JT | First Bank | JAN 2022 | Loan on our personal residence in TN | \$500,001 - \$1,000,000 |
| JT | First Bank | OCT 2021 | Home Loan DC Property | \$500,001 - \$1,000,000 |
| JT | First Bank | June 2021 | Bank LOC | \$1,000,001 - \$5,000,000 |
| JT | First Bank | May 2022 | Residential Rental Property | \$1,000,001 - \$5,000,000 |
| | Republic Bank | April 2023 | M. Green's 26% of loan on rental property. | \$15,001 - \$50,000 |
| | Republic Bank | November 2019 | M. Green's 26% of loan on rental property. | \$50,001 - \$100,000 |
| | Republic Bank | November 2017 | M. Green's 26% of loan on rental property. | \$50,001 - \$100,000 |
| | Liberty Federal Credit Union | 2023 | M. Green's 26% of loan on rental property. | \$50,001 - \$100,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|-----------------|----------------------|
| President & CEO | 5 Stones Consulting |

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|--------------|--|--|
| January 2019 | State of TN Retirement System and Myself | This is the retirement system for the state of Tennessee. I was an employee of the state as a State Senator. |

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

| Source | Trip Details | | | | Inclusions | | |
|----------------------------------|--------------|------------|---|------------------|-------------------------------------|-------------------------------------|--------------------------|
| | Start Date | End Date | Itinerary | Days at Own Exp. | Lodging? | Food? | Family? |
| Association of Marshall Scholars | 01/12/2023 | 01/17/2023 | Dulles, VA - Oxford, UK - London, UK - Washington, DC | 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

- o Birch Creek Properties (100% Interest) (Owner: JT)
LOCATION: US
DESCRIPTION: This is a real estate investment entity with loans to other entities, properties that it rents to individuals, etc.
- o Birch Creek Properties ⇒ Westchester Properties (26% Interest) (Owner: JT)
LOCATION: US
DESCRIPTION: This company rents individual houses, and small 2 - 4 unit town homes.
- o Equitable Advisors Investment Account (Owner: JT)
- o Equitable Advisors Investment Account
- o Equitable Retirement Account
COMMENTS: AXA Changed its name to Equitable
- o IRA Innovations Self Directed IRA
- o State of TN 401(k)
- o State of TN 457 Plan

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. Mark Dr Green , 08/12/2024