Filing ID #10066819

# Financial Disclosure Report

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## Filer Information

**Name:** Hon. Ralph W. Norman Jr.
**Status:** Member
**State/District:** SC05

## Filing Information

**Filing Type:** Annual Report
**Filing Year:** 2024
**Filing Date:** 08/13/2025

## Schedule A: Assets and "Unearned" Income

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| American Electric Power Company, Inc. (AEP) [ST] | SP | $15,001 - $50,000 | Dividends | $1,001 - $2,500 | |
| Bank of America Corporation (BAC) [ST] | | $15,001 - $50,000 | Dividends | $2,501 - $5,000 | |
| Coca-Cola Company (KO) [ST] | | $1,001 - $15,000 | Dividends | $201 - $1,000 | |
| Collenge Investment [RP]<br>Location: Rock Hill, SC, US<br>Description: property held for investment | | $500,001 - $1,000,000 | None | | |
| Dominion Resources, Inc. (D) [ST] | | $15,001 - $50,000 | Dividends | $1 - $200 | |
| DTE Energy Company (DTE) [ST] | | $1,001 - $15,000 | Dividends | $1,001 - $2,500 | |
| Exxon Mobil Corporation (XOM) [ST] | SP | $100,001 - $250,000 | Dividends | $5,001 - $15,000 | |
| Pfizer, Inc. (PFE) [ST] | | $15,001 - $50,000 | Dividends | $201 - $1,000 | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| PNC Bank, National Association [IH] | | $5,000,001 - $25,000,000 | Tax-Deferred | | ☐ |
| South State Bank [BA] | | $500,001 - $1,000,000 | Interest | $15,001 - $50,000 | ☐ |
| South State Corporation (SSB) [ST] | | $500,001 - $1,000,000 | Dividends | $15,001 - $50,000 | ☐ |
| Southern Company (SO) [ST] | | $1,001 - $15,000 | Dividends | $1,001 - $2,500 | ☐ |
| Truist Financial Corporation (TFC) [ST] | | $50,001 - $100,000 | Dividends | $2,501 - $5,000 | ☐ |
| Walt Disney Company (DIS) [ST] | | $15,001 - $50,000 | Dividends | $201 - $1,000 | ☐ |
| 4 Norm ⇒ 655-00-00-020 [RP] LOCATION: Fort Mill, SC, US | | $500,001 - $1,000,000 | Rent | $50,001 - $100,000 | ☐ |
| 4 Norm ⇒ Hwy 160/Take 5 [RP] LOCATION: Fort Mill, SC, US | | $500,001 - $1,000,000 | Rent | $100,001 - $1,000,000 | ☐ |
| America Funds ⇒ The Income Fund of America Class A [MF] | | $50,001 - $100,000 | Dividends | $201 - $1,000 | ☐ |
| American Century IRA ⇒ American Century Growth Fund - I Class (TWGIX) [MF] | SP | $100,001 - $250,000 | Tax-Deferred | | ☑ |
| American Century IRA ⇒ American Century Growth Fund Investor Class [MF] | | $15,001 - $50,000 | Tax-Deferred | | ☑ |
| American Century IRA ⇒ American Century Select Fund Investor Class [MF] | SP | $100,001 - $250,000 | Tax-Deferred | | ☑ |
| American Century IRA ⇒ American Century Ultra Fund Investor Class [MF] | SP | $100,001 - $250,000 | Tax-Deferred | | ☑ |
| Celanese North, LLC ⇒ Celanese North [RP] LOCATION: Rock Hill, SC, US | | $250,001 - $500,000 | None | | ☐ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Cowland ⇒<br>150-00-00-128 [RP]<br>LOCATION: Chester, SC, US | | $100,001 - $250,000 | Rent | $50,001 - $100,000 | |
| Drypowder PO LLC ⇒<br>Powdersville [RP]<br>LOCATION: Powdersville, SC, US | | $100,001 - $250,000 | None | | |
| Fayet Hotel LLC ⇒<br>Holiday Inn Express [RP]<br>LOCATION: Fayetteville, NC, US | | $100,001 - $250,000 | Interest, Rent | $5,001 - $15,000 | |
| First Land Company ⇒<br>592-00-00-005 [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | None | | |
| First Land Company ⇒<br>633-00-00-006 [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | Rent | $2,501 - $5,000 | |
| First Land Company ⇒<br>633-00-00-010 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| First Land Company ⇒<br>633-00-00-013 [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | None | | |
| First Land Company ⇒<br>633-00-00-019 [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | Rent | $15,001 - $50,000 | |
| First Land Company ⇒<br>633-08-01-005 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| First Land Company ⇒<br>633-08-01-015 [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | Rent | $5,001 - $15,000 | |
| First Land Company ⇒<br>635-00-00-114 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| First Land Company ⇒ | | $50,001 - | Rent | $2,501 - $5,000 | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| 667-01-01-052 [RP]<br>LOCATION: Rock Hill, SC, US | | $100,000 | | | |
| First Land Company ⇒ 667-01-01-139 [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | Rent | $15,001 - $50,000 | |
| First Land Company ⇒ 667-01-01-141 [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | Rent | $2,501 - $5,000 | |
| First Land Company ⇒ 667-01-01-144 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | Rent | $1,001 - $2,500 | |
| First Land Company ⇒ 760 Herlong Rd [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | Rent | $1,001 - $2,500 | |
| First Land Company ⇒ Bonneybrook House [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| First Land Company ⇒ Celanese Bridge [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| First Land Company ⇒ Celanese Property [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | Rent | $1,001 - $2,500 | |
| First Land Company ⇒ Cherry Road [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | Rent | $5,001 - $15,000 | |
| First Land Company ⇒ College Avenue Duplex [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | Rent | $1 - $200 | |
| First Land Company ⇒ Galleria Mall [RP]<br>LOCATION: Rock Hill, SC, US | | $100,001 - $250,000 | Rent | $5,001 - $15,000 | |
| First Land Company ⇒ Green Land [RP] | | $1,001 - $15,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| LOCATION: Rock Hill, SC, US | | | | | |
| First Land Company ⇒ Heckled/Herlong [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | None | | ☐ |
| First Land Company ⇒ Herlong Ave [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | None | | ☐ |
| First Land Company ⇒ Red River Road [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | None | | ☐ |
| First Land Company ⇒ The Perch [RP]<br>LOCATION: Rock Hill, SC, US | | $100,001 - $250,000 | Rent | $1,001 - $2,500 | ☐ |
| First Land Company ⇒ Thomason Tract [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | None | | ☐ |
| First Land Company ⇒ Valvoline [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | Rent | $201 - $1,000 | ☐ |
| FLPO 1 ⇒ Sharonwood [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | None | | ☐ |
| Four Belles LLC ⇒ Isle of Palms Beach House [RP]<br>LOCATION: Isle of the Palms, SC, US | | $1,000,001 - $5,000,000 | None | | ☐ |
| Galleria Land ⇒ 662-04-01-086 [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | None | | ☐ |
| Galleria Land ⇒ 662-04-01-087 [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | Rent | $1,001 - $2,500 | ☐ |
| Galleria Land ⇒ 667-01-01-005 [RP] | | $100,001 - $250,000 | Rent | $2,501 - $5,000 | ☐ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| LOCATION: Rock Hill, SC, US | | | | | |
| Hwy 21 Storage LLC ⇒ Hwy 21 Storage [RP]<br>LOCATION: Fort Mill, SC, US | | $50,001 - $100,000 | None | | |
| India Hook Development ⇒ 635-00-00-041 [RP]<br>LOCATION: Rock Hill, SC, US | | $250,001 - $500,000 | None | | |
| India Hook Development ⇒ 635-00-00-273 [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | None | | |
| Kanawah ⇒ 665-00-00-001 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| Lancaster Land ⇒ 0044-00-018-00 [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | None | | |
| Landover Beach ⇒ R-05805-003-040 [RP]<br>LOCATION: Wrightsville Beach, NC, US | | $250,001 - $500,000 | None | | |
| Landover One ⇒ 506-00-00-017 [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | Rent | $1,001 - $2,500 | |
| Landover One ⇒ 633-00-00-001 [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | Rent | $1,001 - $2,500 | |
| Landover One ⇒ 633-00-00-002 [RP]<br>LOCATION: Rock Hill, SC, US | | $250,001 - $500,000 | Rent | $5,001 - $15,000 | |
| Landover One ⇒ 633-00-00-012 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| Landover One ⇒ 633-06-01-025 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Landover One ⇒<br>633-06-01-025 (2) [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| Landover One ⇒<br>633-06-01-041 [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | None | | |
| Landover One ⇒<br>633-06-01-042 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| Landover One ⇒<br>667-01-01-060 [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | Rent | $5,001 - $15,000 | |
| Landover Timber ⇒<br>3382-86-9466-0000 [RP]<br>LOCATION: Rose Hill, NC, US | | $500,001 - $1,000,000 | None | | |
| Laurel Creek, LLC ⇒<br>635-07-01-001 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| Laurel Creek, LLC ⇒<br>635-07-01-069 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| Laurel Creek, LLC ⇒<br>Magnolia Room [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| Laurel Creek, LLC ⇒<br>Melrose House [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| LPL Brokerage Account ⇒<br>AT&T Inc. (T) [ST] | JT | $15,001 - $50,000 | Dividends | $201 - $1,000 | |
| LPL Brokerage Account ⇒<br>Bank of America Corporation (BAC) [ST] | JT | $15,001 - $50,000 | Dividends | $201 - $1,000 | |
| LPL Brokerage Account ⇒<br>BNY Mellon Equity Income Fund Class I [DQIRX] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $2,501 - $5,000 | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| [MF] | | | | | |
| LPL Brokerage Account ⇒ BrandywineGLOBAL High Yield Fund Class I (BGHIX) [MF] | JT | None | Capital Gains, Dividends | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒ Columbia Contrarian Core Fund Class I (SMGIX) [MF] | JT | None | Capital Gains, Dividends | $2,501 - $5,000 | ☑ |
| LPL Brokerage Account ⇒ Deere & Company (DE) [ST] | JT | $100,001 - $250,000 | Dividends | $1,001 - $2,500 | ☐ |
| LPL Brokerage Account ⇒ Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒ Fidelity Advisor Corporate Bond Fund: Class I (FCBIX) [MF] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $1 - $200 | ☑ |
| LPL Brokerage Account ⇒ Fidelity Advisor Equity Growth Fund: Class I (EQPGX) [MF] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒ Fidelity Advisor Equity Growth Fund: Class I (EQPGX) [MF] | JT | None | Dividends | $201 - $1,000 | ☐ |
| LPL Brokerage Account ⇒ Fidelity Advisor Industrials Fund: Class I (FCLIX) [MF] | JT | None | Capital Gains | $201 - $1,000 | ☐ |
| LPL Brokerage Account ⇒ Fidelity Utilities Fund (FIUIX) [MF] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $1,001 - $2,500 | ☑ |
| LPL Brokerage Account ⇒ Fidelity Utilities Fund (FIUIX) [MF] | JT | None | Dividends | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒ Franklin Dynatech Advisor FDYZX [MF] | JT | $1,001 - $15,000 | Capital Gains | $2,501 - $5,000 | ☑ |
| LPL Brokerage Account ⇒ Franklin Utilities Fund Advisor Class (FRUAX) [MF] | JT | None | Dividends | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒ | JT | $1,001 - $15,000 | None | | ☑ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| FT Vest Laddered Buffer ETF (BUFR) [EF] | | | | | |
| LPL Brokerage Account ⇒<br>Ishares US Basic Materials IYM [EF] | JT | $1,001 - $15,000 | Dividends | $1 - $200 | ☐ |
| LPL Brokerage Account ⇒<br>JPMorgan Equity Premium Income Fund [MF] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $201 - $1,000 | ☐ |
| LPL Brokerage Account ⇒<br>LPL Brokerage Sweep Account [BA] | JT | $15,001 - $50,000 | Interest | $1 - $200 | ☐ |
| LPL Brokerage Account ⇒<br>MFS Technology Fund Class I (MTCIX) [MF] | JT | None | Capital Gains | $1,001 - $2,500 | ☑ |
| LPL Brokerage Account ⇒<br>Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF] | JT | $1,001 - $15,000 | None | | ☑ |
| LPL Brokerage Account ⇒<br>Payden Emerging Markets Bond Fund (PYEMX) [MF] | JT | None | Capital Gains | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒<br>Putnam Convertible Securities Fund Class Y (PCGYX) [MF] | JT | None | Capital Gains, Dividends | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒<br>Putnam Core Equity Fund [MF] | JT | $15,001 - $50,000 | Dividends | $201 - $1,000 | ☐ |
| LPL Brokerage Account ⇒<br>Putnam Global Technology Fund Y Shs (PGTYX) [MF] | JT | None | Capital Gains | $2,501 - $5,000 | ☑ |
| LPL Brokerage Account ⇒<br>Putnam Large Cap Value PEIYX [MF] | JT | None | Dividends | $201 - $1,000 | ☐ |
| LPL Brokerage Account ⇒<br>Renaissance Global Real Estate Fund Class A DSC (OECYX) [MF] | JT | None | Capital Gains | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒<br>SPDR Dow Jones Industrial Average ETF (DIA) [EF] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒<br>SPDR Gold Trust (GLD) [EF] | JT | None | Capital Gains | $201 - $1,000 | ☐ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| LPL Brokerage Account ⇒<br>SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $1 - $200 | ☐ |
| LPL Brokerage Account ⇒<br>T. Rowe Price Financial Services Fund, Inc. (PRISX) [MF] | JT | $1,001 - $15,000 | Dividends | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒<br>Victory Pioneer International Equity Fund Class Y (INVYX) [MF] | JT | None | Capital Gains | $201 - $1,000 | ☑ |
| LPL Brokerage Account ⇒<br>Wasatch-Hoisington U.S. Treasury Fund (WHOSX) [MF] | JT | $1,001 - $15,000 | None | | ☑ |
| LPL Financial SEP IRA ⇒<br>Cash Account [BA] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| LPL Financial SEP IRA ⇒<br>Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | | $1,001 - $15,000 | Tax-Deferred | | ☑ |
| LPL Financial SEP IRA ⇒<br>Fidelity Advisor Equity Growth Fund: Class I (EQPGX) [MF] | | $1,001 - $15,000 | Tax-Deferred | | ☑ |
| LPL Financial SEP IRA ⇒<br>JPMorgan Equity Premium Income Fund [MF] | | $1,001 - $15,000 | Tax-Deferred | | ☐ |
| LPL Financial SEP IRA ⇒<br>Putnam Core Equity Fund [MF] | | $1,001 - $15,000 | Tax-Deferred | | ☐ |
| LPL Financial SEP IRA ⇒<br>SPDR Dow Jones Industrial Average ETF (DIA) [EF] | | $1,001 - $15,000 | Tax-Deferred | | ☑ |
| LPL Financial SEP IRA ⇒<br>SPDR Gold Shares [EF] | | $1,001 - $15,000 | Tax-Deferred | | ☐ |
| LPL Financial SEP IRA ⇒<br>T. Rowe Price Financial Services Fund, Inc. (PRISX) [MF] | | $1,001 - $15,000 | Tax-Deferred | | ☑ |
| Montcross Hawley Ave, LLC ⇒<br>Belmont Home 2 [RP]<br><br>LOCATION: Belmont, NC, US | | $100,001 - $250,000 | Interest, Rent | $2,501 - $5,000 | ☐ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Myrtle CG Investments LLC ⇒ Cherry Grove Hampton [RP]<br>LOCATION: Cherry Grove, SC, US | | $50,001 - $100,000 | Interest | $1 - $200 | |
| Norman Concord ⇒ 633-08-01-010 [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | Rent | $1,001 - $2,500 | |
| Norman Development ⇒ 020-23-01-001 [RP]<br>LOCATION: Fort Mill, SC, US | | $1,000,001 - $5,000,000 | Rent | $100,001 - $1,000,000 | |
| Norman Development ⇒ 020-23-01-006 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| Norman Development ⇒ 622-00-00-012 [RP]<br>LOCATION: Rock Hill, SC, US | | $500,001 - $1,000,000 | None | | |
| Norman Development ⇒ 667-01-01-010 [RP]<br>LOCATION: Rock Hill, SC, US | | $500,001 - $1,000,000 | Rent | $15,001 - $50,000 | |
| Norman Development ⇒ 667-01-01-019 [RP]<br>LOCATION: Rock Hill, SC, US | | $500,001 - $1,000,000 | Rent | $50,001 - $100,000 | |
| Norman Development ⇒ 667-01-01-023 [RP]<br>LOCATION: Rock Hill, SC, US | | $500,001 - $1,000,000 | Rent | $15,001 - $50,000 | |
| Norman Development ⇒ 667-01-01-092 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,000,001 - $5,000,000 | Rent | $50,001 - $100,000 | |
| Norman Development ⇒ 667-01-01-093 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,000,001 - $5,000,000 | Rent | $100,001 - $1,000,000 | |
| Norman Development ⇒ 667-01-01-107 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,000,001 - $5,000,000 | Rent | $50,001 - $100,000 | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Norman Development ⇒ 667-01-01-116 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,000,001 - $5,000,000 | Rent | $100,001 - $1,000,000 | |
| Norman Development ⇒ 667-01-01-119 [RP]<br>LOCATION: Rock Hill, SC, US | | $250,001 - $500,000 | None | | |
| Norman Development ⇒ 667-01-01-134 [RP]<br>LOCATION: Rock Hill, SC, US | | $500,001 - $1,000,000 | Rent | $50,001 - $100,000 | |
| Norman Development ⇒ 670-00-00-142 [RP]<br>LOCATION: Rock Hill, SC, US | | $100,001 - $250,000 | None | | |
| Norman Development ⇒ 670-00-00-194 [RP]<br>LOCATION: Rock Hil, SC, US | | $1,001 - $15,000 | None | | |
| Norman Development ⇒ 670-00-00-195 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| Norman Development ⇒ Medical Building [RP]<br>LOCATION: Tryon, NC, US | | $250,001 - $500,000 | None | | |
| Norman Development ⇒ Monument Sign [RP]<br>LOCATION: Rock Hill, SC, US | | $50,001 - $100,000 | Rent | $15,001 - $50,000 | |
| Norman Development ⇒ Myrtle Beach, SC Hotel [RP]<br>LOCATION: Myrtle Beach, SC, US | | $100,001 - $250,000 | None | | |
| Norman Development ⇒ Waynesville Golf Course [RP]<br>LOCATION: Waynesville, NC, US | | $250,001 - $500,000 | None | | |
| Norman Green ⇒ 0533-0401-00715 [RP]<br>LOCATION: Rock Hill, SC, US | | $15,001 - $50,000 | Rent | $50,001 - $100,000 | |
| Norman RH OZ LLC ⇒ | | $100,001 - | Rent | $201 - $1,000 | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Guardian [RP]<br>LOCATION: Rock Hill, SC, US | | $250,000 | | | |
| Piedmont Hills ⇒<br>667-01-01-002 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | None | | |
| Ralph David ⇒<br>663-00-00-004 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,000,001 - $5,000,000 | Rent | $50,001 - $100,000 | |
| RD Corners ⇒<br>633-08-01-020 [RP]<br>LOCATION: Rock Hill, SC, US | | $500,001 - $1,000,000 | None | | |
| RD Corners ⇒<br>633-08-01-021 [RP]<br>LOCATION: Rock Hill, SC, US | | $1,000,001 - $5,000,000 | Rent | $100,001 - $1,000,000 | |
| RH Carwash, LLC ⇒<br>Dave Lyle Car Wash [RP]<br>LOCATION: Rock Hill, SC, US | | $1,001 - $15,000 | Rent | None | |
| Rock Hill LLC ⇒<br>Myrtle Beach Hotel [RP]<br>LOCATION: Myrtle Beach, SC, US | | $100,001 - $250,000 | Dividends | $15,001 - $50,000 | |
| South State Bank IRA ⇒<br>Halliburton Company (HAL) [ST] | | $15,001 - $50,000 | Tax-Deferred | | |
| South State Bank IRA ⇒<br>South State Bank IRA (Cash) [IH] | SP | $1,001 - $15,000 | Tax-Deferred | | |
| South State Bank IRA ⇒<br>South State Bank IRA (Cash) [IH] | | $1,001 - $15,000 | Tax-Deferred | | |
| State FF, LLC ⇒<br>Statesville Fairfield [RP]<br>LOCATION: Statesville, NC, US | | $100,001 - $250,000 | None | | |
| TR Gateway, LLC ⇒<br>Travelers Rest Hampton/Land [RP]<br>LOCATION: Travelers Rest, SC, US | | $50,001 - $100,000 | Interest, Rent | $2,501 - $5,000 | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Tryon Building Investment LLC ⇒ Tryon Building Investment [RP]<br><br>LOCATION: Tryon, NC, US | | $250,001 - $500,000 | Interest, Rent | $5,001 - $15,000 | ☐ |
| Warren Norman Company 401K Plan ⇒ American Funds 2020 Target Date - Class R2E (RBEHX) [MF] | | $100,001 - $250,000 | Tax-Deferred | | ☐ |
| Waynesville Investment, LLC ⇒ Waynesville Investment [RP]<br><br>LOCATION: Waynesville, NC, US | | $250,001 - $500,000 | None | | ☐ |
| Wells Fargo IRA ⇒ Allspring Special Large Cap Value Fund [MF] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| Wells Fargo IRA - SP ⇒ Allspring Special Large Cap Value Fund [MF] | SP | $15,001 - $50,000 | Tax-Deferred | | ☐ |

* 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? |
|---|---|---|---|---|---|
| LPL Brokerage Account ⇒ Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | JT | 12/06/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | | 12/06/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ MFS Technology Fund Class I (MTCIX) [MF] | JT | 11/01/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ MFS Technology Fund Class I (MTCIX) [MF] | | 11/01/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ DWS RREEF Real Estate Securities Fund - Class Institutional (RRRRX) [MF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ Fidelity Advisor Equity Growth Fund: Class I (EQPGX) [MF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| LPL Brokerage Account ⇒<br>Fidelity Utilities Fund (FIUIX) [MF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>Fidelity Advisor Corporate Bond Fund: Class I (FCBIX) [MF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>Franklin Utilities Fund Advisor Class (FRUAX) [MF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>Putnam Core Equity Fund Class Y (PMYYX) [MF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>Putnam Large Cap Value Fund Class Y (PEIYX) [MF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>SPDR Dow Jones Industrial Average ETF (DIA) [EF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>SPDR Dow Jones Industrial Average ETF (DIA) [EF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>Wasatch-Hoisington U.S. Treasury Fund (WHOSX) [MF] | JT | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒<br>Putnam Large Cap Value Fund Class Y (PEIYX) [MF] | | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒<br>Putnam Core Equity Fund Class Y (PMYYX) [MF] | | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒<br>Fidelity Advisor Equity Growth Fund: Class I (EQPGX) [MF] | | 10/03/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒<br>DWS RREEF Real Estate Securities Fund - Class Institutional (RRRRX) [MF] | | 10/03/2025 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>DWS RREEF Real Estate Securities Fund - Class Institutional | JT | 09/05/2024 | P | $1,001 - $15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| (RRRRX) [MF] | | | | | |
| LPL Financial SEP IRA ⇒ DWS RREEF Real Estate Securities Fund - Class Institutional (RRRRX) [MF] | | 09/05/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ Invesco Discovery Mid Cap Growth Fund Class Y (OEGYX) [MF] | JT | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ Macquarie National High-Yield Municipal Bond Fund Institutional (DVHIX) [MF] | JT | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | JT | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ FT Vest Laddered Buffer ETF (BUFR) [EF] | JT | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ Fidelity Advisor Utilities Fund: Class I (FUGIX) [MF] | JT | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ Manning & Napier Fd, High Yield Bond Series Class I (MNHAX) [MF] | JT | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ PIMCO Preferred and Capital Securities Fund Class I-2 (PFPNX) [MF] | JT | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ Victory Pioneer International Equity Fund Class Y (INVYX) [MF] | JT | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ MFS Technology Fund Class I (MTCIX) [MF] | JT | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ T. Rowe Price Financial Services Fund, Inc. (PRISX) [MF] | JT | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ T. Rowe Price Financial Services Fund, Inc. (PRISX) [MF] | | 07/09/2024 | P | $1,001 - $15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| LPL Financial SEP IRA ⇒<br>MFS Technology Fund Class I (MTCIX) [MF] | | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒<br>Victory Pioneer International Equity Fund Class Y (INVYX) [MF] | | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒<br>Fidelity Advisor Utilities Fund: Class I (FUGIX) [MF] | | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒<br>Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒<br>Invesco Discovery Mid Cap Growth Fund Class Y (OEGYX) [MF] | | 07/09/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>Fidelity Advisor Utilities Fund: Class I (FUGIX) [MF] | JT | 06/03/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒<br>Fidelity Advisor Utilities Fund: Class I (FUGIX) [MF] | | 06/03/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>DWS Short Duration Fund - Class Institutional (PPILX) [MF] | JT | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | JT | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>Fidelity Advisor Corporate Bond Fund: Class I (FCBIX) [MF] | JT | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>JPMorgan Equity Premium Income Fund Class I (JEPIX) [MF] | JT | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>BrandywineGLOBAL High Yield Fund Class I (BGHIX) [MF] | JT | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒<br>MFS Technology Fund Class I (MTCIX) [MF] | JT | 01/05/2024 | P | $1,001 - $15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| LPL Brokerage Account ⇒ Putnam Convertible Securities Fund Class Y (PCGYX) [MF] | JT | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ SPDR Dow Jones Industrial Average ETF (DIA) [EF] | JT | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ SPDR Dow Jones Industrial Average ETF (DIA) [EF] | | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ MFS Technology Fund Class I (MTCIX) [MF] | | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ DWS Short Duration Fund - Class Institutional (PPILX) [MF] | | 01/05/2024 | P | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ AB Global Real Estate Investment Fund, Inc. - Class R (ARRRX) [MF] | JT | 12/26/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ Franklin Utilities Fund Advisor Class (FRUAX) [MF] | JT | 12/26/2024 | S (partial) | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ Putnam Large Cap Value Fund Class Y (PEIYX) [MF] | JT | 12/26/2024 | S (partial) | $1,001 - $15,000 | ☐ |
| LPL Financial SEP IRA ⇒ Putnam Large Cap Value Fund Class Y (PEIYX) [MF] | | 12/26/2024 | S (partial) | $1,001 - $15,000 | ☐ |
| LPL Financial SEP IRA ⇒ DWS RREEF Real Estate Securities Fund - Class Institutional (RRRRX) [MF] | | 12/26/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ MFS Technology Fund Class I (MTCIX) [MF] | JT | 12/06/2024 | S (partial) | $1,001 - $15,000 | ☐ |
| LPL Financial SEP IRA ⇒ MFS Technology Fund Class I (MTCIX) [MF] | | 12/06/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Financial SEP IRA ⇒ DWS RREEF Real Estate Securities Fund - Class Institutional | | 11/01/2024 | S | $1,001 - $15,000 | ☐ |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| (RRRRX) [MF] | | | | | |
| LPL Brokerage Account ⇒ DWS RREEF Real Estate Securities Fund - Class Institutional (RRRRX) [MF] | JT | 11/01/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ Invesco Discovery Mid Cap Growth Fund Class Y (OEGYX) [MF] | JT | 10/03/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ Columbia Contrarian Core Fund Class I (SMGIX) [MF] | JT | 10/03/2024 | S (partial) | $1,001 - $15,000 | ☑ |
| LPL Brokerage Account ⇒ Macquarie National High-Yield Municipal Bond Fund Institutional (DVHIX) [MF] | JT | 10/03/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ BNY Mellon Equity Income Fund Class I (DQIRX) [MF] | JT | 07/09/2024 | S (partial) | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ Columbia Contrarian Core Fund Class I (SMGIX) [MF] | JT | 07/09/2024 | S (partial) | $1,001 - $15,000 | ☑ |
| LPL Brokerage Account ⇒ DWS Short Duration Fund - Class Institutional (PPILX) [MF] | JT | 07/09/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ Fidelity Advisor Corporate Bond Fund: Class I (FCBIX) [MF] | JT | 07/09/2024 | S (partial) | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ Fidelity Advisor Industrials Fund: Class I (FCLIX) [MF] | JT | 07/09/2024 | S (partial) | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ JPMorgan Equity Premium Income Fund Class I (JEPIX) [MF] | JT | 07/09/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒ BrandywineGLOBAL High Yield Fund Class I (BGHIX) [MF] | JT | 07/09/2024 | S (partial) | $1,001 - $15,000 | ☑ |
| LPL Brokerage Account ⇒ Franklin DynaTech Fund Class Advisor (FDYZX) [MF] | JT | 07/09/2024 | S (partial) | $1,001 - $15,000 | ☑ |
| LPL Brokerage Account ⇒ Putnam Global Technology Fund Y Shs (PGTYX) [MF] | JT | 07/09/2024 | S (partial) | $1,001 - $15,000 | ☑ |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| LPL Brokerage Account ⇒<br>Putnam Convertible Securities Fund Class Y (PCGYX) [MF] | JT | 07/09/2024 | S (partial) | $1,001 - $15,000 | ☑ |
| LPL Brokerage Account ⇒<br>SPDR Dow Jones Industrial Average ETF (DIA) [EF] | JT | 07/09/2024 | S (partial) | $1,001 - $15,000 | ☑ |
| LPL Brokerage Account ⇒<br>Fidelity Advisor Utilities Fund: Class I (FUGIX) [MF] | JT | 10/03/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒<br>Franklin DynaTech Fund Class Advisor (FDYZX) [MF] | JT | 10/03/2024 | S (partial) | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒<br>MFS Technology Fund Class I (MTCIX) [MF] | JT | 10/03/2024 | S (partial) | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒<br>Manning & Napier Fd, High Yield Bond Series Class I (MNHAX) [MF] | JT | 10/03/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒<br>PIMCO Preferred and Capital Securities Fund Class I-2 (PFPNX) [MF] | JT | 10/03/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒<br>Victory Pioneer International Equity Fund Class Y (INVYX) [MF] | JT | 10/03/2024 | S (partial) | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒<br>Putnam Global Technology Fund Y Shs (PGTYX) [MF] | JT | 10/03/2024 | S (partial) | $1,001 - $15,000 | ☑ |
| LPL Brokerage Account ⇒<br>DWS GNMA Fund - Class Institutional (GIGGX) [MF] | JT | 01/05/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒<br>Eaton Vance Floating Rate & High Income Fund Insti Cl (EIFHX) [MF] | JT | 01/05/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒<br>Federated Hermes Ultrashort Bond Fund IS Shares (FULIX) [MF] | JT | 01/05/2024 | S | $1,001 - $15,000 | ☐ |
| LPL Brokerage Account ⇒<br>Fidelity Advisor Technology Fund: Class I (FATIX) [MF] | JT | 01/05/2024 | S | $1,001 - $15,000 | ☐ |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| LPL Brokerage Account ⇒ Payden Emerging Markets Bond Fund (PYEMX) [MF] | JT | 01/05/2024 | S (partial) | $1,001 - $15,000 | ✓ |
| LPL Brokerage Account ⇒ Putnam Global Technology Fund Y Shs (PGTYX) [MF] | JT | 01/05/2024 | S (partial) | $1,001 - $15,000 | ✓ |
| LPL Brokerage Account ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF] | JT | 01/05/2024 | S (partial) | $1,001 - $15,000 | |
| LPL Brokerage Account ⇒ Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | JT | 09/05/2024 | S (partial) | $1,001 - $15,000 | ✓ |
| LPL Brokerage Account ⇒ Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | JT | 06/03/2024 | S (partial) | $1,001 - $15,000 | ✓ |
| LPL Financial SEP IRA ⇒ Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | | 06/03/2024 | S (partial) | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Fidelity Advisor Consumer Discretionary Fund: Class I (FCNIX) [MF] | | 09/05/2024 | S (partial) | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF] | | 01/05/2024 | S (partial) | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Putnam Global Technology Fund Y Shs (PGTYX) [MF] | | 01/05/2024 | S (partial) | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Fidelity Advisor Technology Fund: Class I (FATIX) [MF] | | 01/05/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ DWS GNMA Fund - Class Institutional (GIGGX) [MF] | | 01/05/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Putnam Global Technology Fund Y Shs (PGTYX) [MF] | | 10/03/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ MFS Technology Fund Class I (MTCIX) [MF] | | 10/03/2024 | S (partial) | $1,001 - $15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| LPL Financial SEP IRA ⇒ Victory Pioneer International Equity Fund Class Y (INVYX) [MF] | | 10/03/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Franklin DynaTech Fund Class Advisor (FDYZX) [MF] | | 10/03/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Fidelity Advisor Utilities Fund: Class I (FUGIX) [MF] | | 10/03/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Columbia Contrarian Core Fund Class I (SMGIX) [MF] | | 10/03/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Invesco Discovery Mid Cap Growth Fund Class Y (OEGYX) [MF] | | 10/03/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ SPDR Dow Jones Industrial Average ETF (DIA) [EF] | | 07/09/2024 | S (partial) | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Putnam Global Technology Fund Y Shs (PGTYX) [MF] | | 07/09/2024 | S (partial) | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Franklin DynaTech Fund Class Advisor (FDYZX) [MF] | | 07/09/2024 | S (partial) | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ JPMorgan Equity Premium Income Fund Class I (JEPIX) [MF] | | 07/09/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Fidelity Advisor Industrials Fund: Class I (FCLIX) [MF] | | 07/09/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ DWS Short Duration Fund - Class Institutional (PPILX) [MF] | | 07/09/2024 | S | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ Columbia Contrarian Core Fund Class I (SMGIX) [MF] | | 07/09/2024 | S (partial) | $1,001 - $15,000 | |
| LPL Financial SEP IRA ⇒ BNY Mellon Equity Income Fund Class I (DQIRX) [MF] | | 07/09/2024 | S | $1,001 - $15,000 | |
| Norman Development ⇒ | | 06/20/2024 | S | $250,001 - | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| Fairburn, GA Hotel [RP]<br>Location: Fairburn, GA, US | | | | $500,000 | |
| American Century IRA ⇒<br>American Century Select Investor Class (TWCIX) [MF] | SP | 12/17/2024 | P | $1,001 - $15,000 | |
| American Century IRA ⇒<br>American Century Ultra Investor Class (TWCUX) [MF] | SP | 12/17/2024 | P | $1,001 - $15,000 | |
| American Century IRA ⇒<br>American Century Growth Investor Class (TWCGX) [MF] | SP | 12/17/2024 | P | $1,001 - $15,000 | |
| American Century IRA ⇒<br>American Century Growth Investor Class (TWCGX) [MF] | | 12/17/2024 | P | $1,001 - $15,000 | |

* 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 |
|---|---|---|---|---|
| | South State | March 2016 | finance real property holdings | $500,001 - $1,000,000 |
| | South State | June 2016 | line of credit from property holdings | $500,001 - $1,000,000 |
| | Bank of York | August 2014 | finance property investment | $500,001 - $1,000,000 |
| | Family Trust | January 2021 | Personal residence mortgage | $250,001 - $500,000 |
| | TD Bank | Nov 2010 | finance personal property investment | $500,001 - $1,000,000 |

## Schedule E: Positions

| Position | Name of Organization |
|---|---|
| Member | 4 Norm |

| Position | Name of Organization |
| --- | --- |
| Member | Catawba |
| Member | Cowland |
| Member | First Land Company |
| Member | Four Bells |
| Member | Galleria Land |
| Member | GBC Rock Hill |
| Member | India Hook Development |
| Member | Kanawah |
| Member | Landcaster Land |
| Member | Landover Beach |
| Member | Landover One |
| Managing Member | Norman Development |
| member | Laurel Creek |
| member | Norman Concord |
| managing member | Norman Development |
| member | Norman Green |
| member | Piedmont Hills |
| member | Ralph David |
| Member | Laurel Creek |
| member | Carmel-Norm |
| member | Firstover Corners |

## Schedule F: Agreements

| Date | Parties To | Terms of Agreement |
| --- | --- | --- |
| January 2014 | Warren Norman Company | 401k plan held with former employer. Tax Deferred. |

## 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

- LPL Brokerage Account (Owner: JT)
  Location: US
- LPL Financial SEP IRA
- Warren Norman Company 401K Plan
- First Land Company
  Location: US
- Landover One
  Location: US
- Norman Development
  Location: US
- RD Corners
  Location: US
- 4 Norm
  Location: US
- India Hook Development
  Location: US
- Galleria Land
  Location: US
- Norman Concord
  Location: US
- Ralph David
  Location: US
- Lancaster Land
  Location: US
- Cowland
  Location: US
- Laurel Creek, LLC
  Location: US
- Landover Beach
  Location: US
- Landover Timber
  Location: US
- Piedmont Hills
  Location: US
- Kanawah
  Location: US

- Norman Green
  LOCATION: US
- America Funds
  LOCATION: US
- American Century IRA (Owner: SP)
- American Century IRA
- South State Bank IRA (Owner: SP)
- South State Bank IRA
- Wells Fargo IRA
- Wells Fargo IRA - SP (Owner: SP)
- Celanese North, LLC
  LOCATION: US
- Norman RH OZ LLC
  LOCATION: US
- Hwy 21 Storage LLC
  LOCATION: US
- Drypowder PO LLC
  LOCATION: US
- Myrtle CG Investments LLC
  LOCATION: US
- Montcross Hawley Ave, LLC
  LOCATION: US
- TR Gateway, LLC
  LOCATION: US
- State FF, LLC
  LOCATION: US
- RH Carwash, LLC
  LOCATION: US
- Waynesville Investment, LLC
  LOCATION: US
- Rock Hill LLC
  LOCATION: US
- Tryon Building Investment LLC
  LOCATION: US
- Fayet Hotel LLC
  LOCATION: US
- FLPO 1
  LOCATION: US
- Four Belles LLC
  LOCATION: US

## 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. Ralph W. Norman Jr., 08/13/2025