



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2024
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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America Checking - MG [BA]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Bank of America Savings - MG [BA]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
USAA Checking & Savings [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
USAA Checking - Joint [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
USAA Savings - Joint [BA]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
USAA Savings DC1 [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
USAA Savings DC2 [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
USAA Savings DC3 [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
529 DC1 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Share class exchange (CLBAX -> FBAFX)					
529 DC1 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC1 ⇒ Capital World Growth and Income Fund - Class 529-F-2 (FCWGX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC1 ⇒ The New Economy Fund - Class 529-F-2 (FNEEX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC1 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC2 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Share class exchange (CLBAX -> FBAFX)					
529 DC2 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC2 ⇒ American Funds New World Fund A (NEWFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ EuroPacific Growth Fund - Class 529-F-2 (FUEPX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ The New Economy Fund - Class 529-F-2 (FNEEX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC2 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC3 ⇒ AMCAP Fund - Class 529-F-2 (FMMM) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC3 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC3 ⇒	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Capital Income Builder Cl F-2 Shs (CAIFX) [MF]					
529 DC3 ⇒ EuroPacific Growth Fund - Class 529-F-2 (FUEPX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC3 ⇒ The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 DC3 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity Brokerage - MG ⇒ Fidelity Treasury Money Market Fund (FZFXX) [MF]	SP	\$1 - \$1,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Brokerage - MG ⇒ State Street Corporation Common Stock (STT) [ST]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Employee Benefit					
Fidelity Brokerage - MG ⇒ State Street Corporation Common Stock (STT) [RS]	SP	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
DESCRIPTION: Employee benefit: unvested shares received as part of spouse's compensation package from State Street Corporation.					
Fidelity Brokerage - MG ⇒ State Street Corporation Common Stock (STT) [RS]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Employee benefit: Deferred Value Award -unvested shares received as part of spouse's compensation package from State Street Corporation.					
Merrill Lynch Brokerage - JA ⇒ Ariel Fund Instl Cl (ARAIX) [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ Domini Impact Bond Fund Institutional Shares (DSBIX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		None	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ First Trust Water ETF (FIW) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merrill Lynch Brokerage - JA ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ ML Bank Deposit Program [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ PIMCO Total Return ESG Fund Institutional Class (PTSAX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Merrill Lynch Brokerage - JA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ Advantage Cash Sweep [BA]	SP	None	None		<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merrill Lynch Brokerage - MG ⇒ Domini Impact Bond Fund Institutional Shares (DSBIX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	None	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ Hartford Schrodgers International Stock Fund (SCIEX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ ML Bank Deposit Program [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ PIMCO Total Return ESG Fund Institutional Class (PTSAX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Brokerage - MG ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merrill Lynch Individual Acct - DC1 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC1 ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Individual Acct - DC1 ⇒ Fidelity Cash Reserves (FDRXX) [MF]	DC	None	None		<input type="checkbox"/>
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Individual Acct - DC1 ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC1 ⇒ ML Bank Deposit Program [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Merrill Lynch Individual Acct - DC2 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC2 ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Individual Acct - DC2 ⇒ Fidelity Cash Reserves (FDRXX) [MF]	DC	None	None		<input type="checkbox"/>
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Merrill Lynch Individual Acct - DC2 ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC2 ⇒ ML Bank Deposit Program [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	\$1 - \$1,000	None		<input type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	DC	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Partial sales less than \$1,000					
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Appreciated over \$1,000					
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares S&P 100 ETF (OEF) [EF]	DC	None	None		<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares S&P 500 Growth ETF (IVW) [EF] DESCRIPTION: Appreciated over \$1,000					<input type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares S&P 500 Value ETF (IVE) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares U.S. Technology ETF (IYW) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ ML Bank Deposit Program [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Merrill Lynch IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA - MG ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	None	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA - MG ⇒ Hartford Schrodgers International Stock Fund (SCIEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA - MG ⇒ ML Bank Deposit Program [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch IRA - MG ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]					<input type="checkbox"/>
Merrill Lynch Roth IRA - JA ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - JA ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - JA ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - JA ⇒ ML Bank Deposit Program [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Merrill Lynch Roth IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - MG ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	None	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - MG ⇒ Hartford Schrodgers International Stock Fund (SCIEX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - MG ⇒	SP	\$50,001 -	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		\$100,000			<input type="checkbox"/>
Merrill Lynch Roth IRA - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - MG ⇒ ML Bank Deposit Program [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Merrill Lynch Roth IRA - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

* Investment Vehicle details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch Brokerage - JA ⇒ Ariel Fund Instl Cl (ARAIX) [MF]		12/18/2024	P	\$1,001 - \$15,000	
529 DC2 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	06/12/2024	P	\$1,001 - \$15,000	
529 DC2 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	12/19/2024	P	\$1,001 - \$15,000	
529 DC3 ⇒ AMCAP Fund - Class 529-F-2 (FMMMXX) [MF]	DC	08/27/2024	P	\$1,001 - \$15,000	
529 DC3 ⇒ AMCAP Fund - Class 529-F-2 (FMMMXX) [MF]	DC	12/17/2024	P	\$1,001 - \$15,000	
529 DC3 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	12/19/2024	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU)	DC	06/06/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
[EF]					
Merrill Lynch Individual Acct - DC2 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	06/06/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	06/06/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	11/08/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	DC	11/08/2024	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC3 ⇒ iShares S&P 100 ETF (OEF) [EF]	DC	01/25/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	03/14/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	12/20/2024	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	12/06/2024	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	11/22/2024	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	11/08/2024	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	10/25/2024	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	10/11/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	09/27/2024	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	09/13/2024	P	\$1,001 - \$15,000	
State Street Corporation Common Stock (STT) [ST] DESCRIPTION: RSU distribution COMMENTS: Underlying asset of Fidelity Brokerage	SP	08/16/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
State Street Corporation Common Stock (STT) [ST] DESCRIPTION: RSU distribution COMMENTS: Underlying asset of Fidelity Brokerage	SP	11/18/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
529 DC1 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	12/16/2024	P	\$1,001 - \$15,000	
529 DC1 ⇒ Capital World Growth and Income Fund - Class 529-F-2 (FCWGX) [MF]	DC	12/17/2024	P	\$1,001 - \$15,000	
529 DC1 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	12/18/2024	P	\$1,001 - \$15,000	
529 DC1 ⇒ The New Economy Fund - Class 529-F-2 (FNEEX) [MF]	DC	12/17/2024	P	\$1,001 - \$15,000	
529 DC1 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	06/12/2024	P	\$1,001 - \$15,000	
529 DC1 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	12/19/2024	P	\$1,001 - \$15,000	
529 DC2 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	12/16/2024	P	\$1,001 - \$15,000	
529 DC2 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	12/18/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
529 DC2 ⇒ The New Economy Fund - Class 529-F-2 (FNEEX) [MF]	DC	12/17/2024	P	\$1,001 - \$15,000	
529 DC3 ⇒ AMCAP Fund - Class 529-F-2 (FMMM) [MF]	DC	08/27/2024	P	\$1,001 - \$15,000	
529 DC3 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	08/27/2024	P	\$15,001 - \$50,000	
529 DC3 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	12/16/2024	P	\$1,001 - \$15,000	
529 DC3 ⇒ The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]	DC	08/27/2024	P	\$1,001 - \$15,000	
529 DC3 ⇒ Capital Income Builder Cl F-2 Shs (CAIFX) [MF]	DC	08/27/2024	P	\$1,001 - \$15,000	
529 DC3 ⇒ EuroPacific Growth Fund - Class 529-F-2 (FUEPX) [MF]	DC	08/27/2024	P	\$1,001 - \$15,000	
529 DC3 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	08/27/2024	P	\$1,001 - \$15,000	
Merrill Lynch Brokerage - JA ⇒ Ariel Fund Instl Cl (ARAIX) [MF]		01/03/2024	P	\$15,001 - \$50,000	
Merrill Lynch Brokerage - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	01/03/2024	P	\$1,001 - \$15,000	
Merrill Lynch Roth IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	12/18/2024	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	09/05/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG MSCI KLD 400 ETF (DSI) [EF]	DC	11/08/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC2 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU)	DC	09/05/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
[EF]					
Merrill Lynch Individual Acct - DC3 ⇒ iShares S&P 500 Value ETF (IVE) [EF]	DC	01/25/2024	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	03/14/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch Individual Acct - DC3 ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]	DC	01/25/2024	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

Source	Type	Amount
State Street Bank & Trust	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

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

SCHEDULE E: POSITIONS

Position	Name of Organization
Co-chair	Massachusetts STEM Advisory Council

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Merrill Lynch Brokerage - JA
- Merrill Lynch Roth IRA - JA
- Merrill Lynch Brokerage - MG (Owner: SP)
- Merrill Lynch Roth IRA - MG (Owner: SP)
- 529 DC1 (Owner: DC)
LOCATION: MA
- 529 DC2 (Owner: DC)
LOCATION: MA
- Merrill Lynch Individual Acct - DC1 (Owner: DC)
- Merrill Lynch Individual Acct - DC2 (Owner: DC)
- 529 DC3 (Owner: DC)
LOCATION: MA
- Merrill Lynch Individual Acct - DC3 (Owner: DC)
- Merrill Lynch IRA - MG (Owner: SP)
- Fidelity Brokerage - MG (Owner: SP)
- Fidelity - State Street Salary Savings Program (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

Yes No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes No

CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Jake Auchincloss , 04/09/2026