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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

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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		☐
Bank of America Savings - MG [BA]	SP	\$50,001 - \$100,000	None		☐
USAA Checking & Savings [BA]		\$15,001 - \$50,000	None		☐
USAA Checking - Joint [BA]	JT	\$1,001 - \$15,000	None		☐
USAA Savings - Joint [BA]	JT	\$1,001 - \$15,000	None		☐
USAA Savings DC1 [BA]	DC	\$1,001 - \$15,000	None		☐
USAA Savings DC2 [BA]	DC	\$1,001 - \$15,000	None		☐
USAA Savings DC3 [BA]	DC	\$1,001 - \$15,000	None		☐
529 DC1 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
529 DC1 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		☒
529 DC1 ⇒ Capital World Growth and Income Fund - Class 529-F-2 (FCWGX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		☒
529 DC1 ⇒ The New Economy Fund - Class 529-F-2 (FNEEX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		☒
529 DC1 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		☒
529 DC2 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		☒
529 DC2 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		☒
529 DC2 ⇒ EuroPacific Growth Fund - Class 529-F-2 (FUEPX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		☒
529 DC2 ⇒ New World Fund, Inc. - Class 529-F-2 (FNFWX) [MF] DESCRIPTION: Share class exchange (NEWFX -> FNFWX)	DC	\$15,001 - \$50,000	Tax-Deferred		☐
529 DC2 ⇒ The New Economy Fund - Class 529-F-2 (FNEEX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		☒
529 DC2 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		☒
529 DC3 ⇒ AMCAP Fund - Class 529-F-2 (FMMMXX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		☒
529 DC3 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		☒
529 DC3 ⇒ Capital Income Builder - Class 529-F-2 (FBCIX) [MF] DESCRIPTION: Share class exchange (CAIFX -> FBCIX)	DC	\$15,001 - \$50,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
529 DC3 ⇒ EuroPacific Growth Fund - Class 529-F-2 (FUEPX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		☒
529 DC3 ⇒ The Bond Fund of America - Class 529-F-2 (FFBOX) [MF] DESCRIPTION: Share class exchange (ABNFX -> FFBOX)	DC	\$15,001 - \$50,000	Tax-Deferred		☐
529 DC3 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		☒
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		☒
Fidelity Brokerage - MG ⇒ Deferred Unit - State Street Corporation Common Stock (STT) [OT] DESCRIPTION: Employee benefit: Deferred Value Award -vested shares received as part of spouse's compensation package from State Street Corporation.	SP	\$100,001 - \$250,000	None		☐
Fidelity Brokerage - MG ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	SP	\$1 - \$1,000	Dividends	\$201 - \$1,000	☐
Fidelity Brokerage - MG ⇒ State Street Corporation Common Stock (STT) [ST] DESCRIPTION: Employee Benefit	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☒
Fidelity Brokerage - MG ⇒ State Street Corporation Common Stock (STT) [RS] DESCRIPTION: Employee benefit: Unvested shares received as part of spouse's compensation package from State Street Corporation.	SP	Spouse/DC Over \$1,000,000	None		☐
Fidelity Brokerage - MG ⇒ State Street Corporation Common Stock (STT) [RS] DESCRIPTION: Employee benefit: Deferred Value Award -unvested shares received as part of spouse's compensation package from State Street Corporation.	SP	\$250,001 - \$500,000	None		☐
Fidelity Health Savings Account ⇒ FDIC Insured Deposit at Wells Fargo HSA [BA] DESCRIPTION: Gross Distribution: \$2,831	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch Brokerage - JA ⇒ Ariel Fund Instl Cl (ARAIX) [MF] DESCRIPTION: Long-term capital gain distribution		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merrill Lynch Brokerage - JA ⇒ Domini Impact Bond Fund Institutional Shares (DSBIX) [MF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Merrill Lynch Brokerage - JA ⇒ First Trust Water ETF (FIW) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Merrill Lynch Brokerage - JA ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Merrill Lynch Brokerage - JA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
Merrill Lynch Brokerage - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		None	Capital Gains	\$1,001 - \$2,500	☒
Merrill Lynch Brokerage - JA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
Merrill Lynch Brokerage - JA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Merrill Lynch Brokerage - JA ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
Merrill Lynch Brokerage - JA ⇒ ML Bank Deposit Program [BA]		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	☐
Merrill Lynch Brokerage - JA ⇒ PIMCO Total Return ESG Fund Institutional Class (PTSAX) [MF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Merrill Lynch Brokerage - JA ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF]		None	Capital Gains	\$2,501 - \$5,000	☒
Merrill Lynch Brokerage - JA ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
Merrill Lynch Brokerage - JA ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	☐
Merrill Lynch Brokerage - JA ⇒		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard ESG U.S. Stock ETF (ESGV) [EF]					
Merrill Lynch Brokerage - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
DESCRIPTION: Long-term capital gain distribution					
Merrill Lynch Brokerage - MG ⇒ Domini Impact Bond Fund Institutional Shares (DSBIX) [MF]	SP	None	Capital Gains	\$201 - \$1,000	☒
Merrill Lynch Brokerage - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	\$15,001 - \$50,000	None		☐
Merrill Lynch Brokerage - MG ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
Merrill Lynch Brokerage - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
Merrill Lynch Brokerage - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	☒
Merrill Lynch Brokerage - MG ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Merrill Lynch Brokerage - MG ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	☒
Merrill Lynch Brokerage - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
Merrill Lynch Brokerage - MG ⇒ ML Bank Deposit Program [BA]	SP	\$1,001 - \$15,000	Interest	\$2,501 - \$5,000	☐
Merrill Lynch Brokerage - MG ⇒ PIMCO Total Return ESG Fund Institutional Class (PTSAX) [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	☒
Merrill Lynch Brokerage - MG ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF]	SP	None	Capital Gains	\$2,501 - \$5,000	☒
Merrill Lynch Brokerage - MG ⇒	SP	\$50,001 -	Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]		\$100,000			☐
Merrill Lynch Brokerage - MG ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch Individual Acct - DC1 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	None	Capital Gains	\$5,001 - \$15,000	☒
Merrill Lynch Individual Acct - DC1 ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]	DC	None	None		☒
DESCRIPTION: Sold for a loss					
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$15,001 - \$50,000	None		☒
Merrill Lynch Individual Acct - DC1 ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]	DC	\$15,001 - \$50,000	None		☒
Merrill Lynch Individual Acct - DC1 ⇒ ML Bank Deposit Program [BA]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
Merrill Lynch Individual Acct - DC2 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]	DC	None	Capital Gains	\$2,501 - \$5,000	☒
Merrill Lynch Individual Acct - DC2 ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]	DC	None	None		☒
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	\$15,001 - \$50,000	None		☒

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	\$201 - \$1,000	☒
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$15,001 - \$50,000	None		☒
Merrill Lynch Individual Acct - DC2 ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]	DC	\$15,001 - \$50,000	None		☒
Merrill Lynch Individual Acct - DC2 ⇒ ML Bank Deposit Program [BA]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
Merrill Lynch Individual Acct - DC3 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	DC	\$1,001 - \$15,000	None		☐
Merrill Lynch Individual Acct - DC3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	DC	\$1,001 - \$15,000	None		☐
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]	DC	\$1,001 - \$15,000	None		☐
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]	DC	\$1,001 - \$15,000	None		☐
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	DC	\$1,001 - \$15,000	None		☐
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	DC	\$1,001 - \$15,000	None		☒
Merrill Lynch Individual Acct - DC3 ⇒ iShares S&P 500 Growth ETF (IVW) [EF]	DC	\$1,001 - \$15,000	None		☒
Merrill Lynch Individual Acct - DC3 ⇒ iShares S&P 500 Value ETF (IVE) [EF]	DC	\$1,001 - \$15,000	None		☒
Merrill Lynch Individual Acct - DC3 ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]	DC	\$1,001 - \$15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merrill Lynch Individual Acct - DC3 ⇒ iShares U.S. Technology ETF (IYW) [EF]	DC	\$1,001 - \$15,000	None		☐
Merrill Lynch Individual Acct - DC3 ⇒ ML Bank Deposit Program [BA]	DC	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Merrill Lynch IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	None	Tax-Deferred		☒
Merrill Lynch IRA - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Merrill Lynch IRA - MG ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Merrill Lynch IRA - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Merrill Lynch IRA - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Merrill Lynch IRA - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		☐
Merrill Lynch IRA - MG ⇒ ML Bank Deposit Program [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Merrill Lynch IRA - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Merrill Lynch Roth IRA - JA ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [EF]		None	Tax-Deferred		☒
Merrill Lynch Roth IRA - JA ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [EF]		None	Tax-Deferred		☒
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]		\$15,001 - \$50,000	Tax-Deferred		☒
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		\$15,001 - \$50,000	Tax-Deferred		☒
Merrill Lynch Roth IRA - JA ⇒ iShares MSCI KLD 400 Social ETF (DSI) [EF]		\$15,001 - \$50,000	Tax-Deferred		☒
Merrill Lynch Roth IRA - JA ⇒ ML Bank Deposit Program [BA]		\$1 - \$1,000	Tax-Deferred		☐
Merrill Lynch Roth IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		☒
Merrill Lynch Roth IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	None	Tax-Deferred		☒
Merrill Lynch Roth IRA - MG ⇒ First Trust Water ETF (FIW) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Merrill Lynch Roth IRA - MG ⇒ Hartford Schroders International Stock Fund (SCIEX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		☐
Merrill Lynch Roth IRA - MG ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		☐
Merrill Lynch Roth IRA - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Merrill Lynch Roth IRA - MG ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		☐
Merrill Lynch Roth IRA - MG ⇒ ML Bank Deposit Program [BA]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Merrill Lynch Roth IRA - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]	SP	\$100,001 - \$250,000	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?
State Street Corporation Common Stock (STT) [ST] DESCRIPTION: RSU distribution	SP	02/18/2025	S	\$15,001 - \$50,000	☐
State Street Corporation Common Stock (STT) [ST] DESCRIPTION: RSU distribution	SP	05/16/2025	S (partial)	\$15,001 - \$50,000	☐
State Street Corporation Common Stock (STT) [ST] DESCRIPTION: RSU distribution	SP	08/18/2025	S (partial)	\$15,001 - \$50,000	☐
State Street Corporation Common Stock (STT) [ST] DESCRIPTION: RSU distribution	SP	11/17/2025	S (partial)	\$15,001 - \$50,000	☐
Merrill Lynch Brokerage - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		08/07/2025	S	\$1,001 - \$15,000	☒
Merrill Lynch Brokerage - JA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]		08/07/2025	S	\$15,001 - \$50,000	☒
Merrill Lynch Brokerage - JA ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF]		08/07/2025	S	\$1,001 - \$15,000	☒
Merrill Lynch Brokerage - MG ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	08/07/2025	S	\$1,001 - \$15,000	☒
Merrill Lynch Brokerage - MG ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF]	SP	08/07/2025	S	\$1,001 - \$15,000	☒
Merrill Lynch Brokerage - MG ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]	SP	08/07/2025	S	\$1,001 - \$15,000	☒
Merrill Lynch Roth IRA - JA ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [OT] LOCATION: US		03/04/2025	S	\$15,001 - \$50,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: ETF					
Merrill Lynch Roth IRA - JA ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [OT] LOCATION: US DESCRIPTION: ETF		03/04/2025	S	\$1,001 - \$15,000	☐
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Roth IRA - JA ⇒ iShares ESG MSCI KLD 400 ETF (DSI) [EF]		08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Roth IRA - JA ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]		08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [OT] LOCATION: US DESCRIPTION: ETF	DC	03/04/2025	S	\$15,001 - \$50,000	☒
Merrill Lynch Individual Acct - DC1 ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [OT] LOCATION: US DESCRIPTION: ETF	DC	03/04/2025	S	\$1,001 - \$15,000	☐
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG MSCI KLD 400 ETF (DSI) [EF]	DC	08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	08/12/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch Individual Acct - DC2 ⇒ BlackRock U.S. Carbon Transition Readiness ETF (LCTU) [OT] LOCATION: US DESCRIPTION: ETF	DC	03/04/2025	S	\$15,001 - \$50,000	☒
Merrill Lynch Individual Acct - DC2 ⇒ BlackRock World ex U.S. Carbon Transition Readiness ETF (LCTD) [OT] LOCATION: US DESCRIPTION: ETF	DC	03/04/2025	S	\$1,001 - \$15,000	☐
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG MSCI KLD 400 ETF (DSI) [EF]	DC	08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	08/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC3 ⇒ iShares S&P 500 Value ETF (IVE) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC3 ⇒ iShares S&P 500 Growth ETF (IVW) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC3 ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	12/24/2025	S	\$1,001 - \$15,000	☐
Merrill Lynch Roth IRA - MG ⇒ Ariel Fund Instl Cl (ARAIX) [MF]	SP	12/24/2025	P	\$15,001 - \$50,000	
Merrill Lynch Roth IRA - MG ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	12/24/2025	S	\$15,001 - \$50,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG MSCI KLD 400 ETF (DSI) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG MSCI KLD 400 ETF (DSI) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI USA ETF (USXF) [EF]	DC	12/24/2025	P	\$1,001 - \$15,000	
Merrill Lynch Roth IRA - JA ⇒ iShares ESG MSCI KLD 400 ETF (DSI) [EF]		12/24/2025	P	\$1,001 - \$15,000	
529 DC3 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	06/11/2025	P	\$1,001 - \$15,000	
529 DC2 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	06/11/2025	P	\$1,001 - \$15,000	
529 DC2 ⇒ Washington Mutual Investors Fund - Class 529-F-2	DC	06/11/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
(FWMMX) [MF]					
Merrill Lynch Brokerage - JA ⇒ Domini Impact Bond Fund Institutional Shares (DSBIX) [MF]		02/24/2025	S	\$15,001 - \$50,000	☒
Merrill Lynch Brokerage - JA ⇒ PIMCO Total Return ESG Fund Institutional Class (PTSAX) [MF]		02/24/2025	S	\$15,001 - \$50,000	☒
Merrill Lynch Brokerage - MG ⇒ Domini Impact Bond Fund Institutional Shares (DSBIX) [MF]	SP	02/24/2025	S	\$15,001 - \$50,000	☒
Merrill Lynch Brokerage - MG ⇒ PIMCO Total Return ESG Fund Institutional Class (PTSAX) [MF]	SP	02/24/2025	S	\$15,001 - \$50,000	☒
529 DC1 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	06/11/2025	P	\$1,001 - \$15,000	
529 DC1 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	06/11/2025	P	\$1,001 - \$15,000	
529 DC1 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	12/15/2025	P	\$1,001 - \$15,000	
529 DC1 ⇒ Capital World Growth and Income Fund - Class 529-F-2 (FCWGX) [MF]	DC	12/16/2025	P	\$1,001 - \$15,000	
529 DC1 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	12/17/2025	P	\$1,001 - \$15,000	
529 DC1 ⇒ The New Economy Fund - Class 529-F-2 (FNEEX) [MF]	DC	12/16/2025	P	\$1,001 - \$15,000	
529 DC1 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	12/18/2025	P	\$1,001 - \$15,000	
529 DC2 ⇒ EuroPacific Growth Fund - Class 529-F-2 (FUEPX) [MF]	DC	12/18/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
529 DC2 ⇒ American Funds Fundamental Investors - Class 529-F-2 (FFXFX) [MF]	DC	12/17/2025	P	\$1,001 - \$15,000	
529 DC2 ⇒ The New Economy Fund - Class 529-F-2 (FNEEX) [MF]	DC	12/16/2025	P	\$1,001 - \$15,000	
529 DC2 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	12/18/2025	P	\$1,001 - \$15,000	
529 DC2 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	12/15/2025	P	\$1,001 - \$15,000	
529 DC3 ⇒ AMCAP Fund - Class 529-F-2 (FMMMX) [MF]	DC	12/12/2025	P	\$1,001 - \$15,000	
529 DC3 ⇒ American Balanced Fund - Class 529-F-2 (FBAFX) [MF]	DC	12/15/2025	P	\$1,001 - \$15,000	
529 DC3 ⇒ Capital Income Builder - Class 529-F-2 (FBCIX) [MF]	DC	12/18/2025	P	\$1,001 - \$15,000	
529 DC3 ⇒ EuroPacific Growth Fund - Class 529-F-2 (FUEPX) [MF]	DC	12/18/2025	P	\$1,001 - \$15,000	
529 DC3 ⇒ Washington Mutual Investors Fund - Class 529-F-2 (FWMMX) [MF]	DC	12/18/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	11/21/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	11/07/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	10/24/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	10/10/2025	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	09/26/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	09/12/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	08/29/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	08/15/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	08/01/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	07/18/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	07/03/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	06/20/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	06/06/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	05/23/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	05/09/2025	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	04/25/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	04/11/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	03/28/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	03/14/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	02/28/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	02/14/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	01/31/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	01/17/2025	P	\$1,001 - \$15,000	
Fidelity - State Street Salary Savings Program ⇒ State Street Target Retirement 2050 Fund Class K (SSDLX) [MF]	SP	01/03/2025	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
	COMMENTS: Paid in full August 2025			
JT	Bank of America	September 2025	Mortgage primary residence	\$1,000,001 - \$5,000,000

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)
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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)
- Fidelity Health Savings Account (Owner: SP)
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. Jake Auchincloss , 04/09/2026