



Filing ID #10076386

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Scott H. Peters  
**Status:** Member  
**State/District:** CA50

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2025  
**Filing Date:** 08/12/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset                                                                    | Owner | Value of Asset             | Income Type(s) | Income              | Tx. ><br>\$1,000?                   |
|--------------------------------------------------------------------------|-------|----------------------------|----------------|---------------------|-------------------------------------|
| Alhambra CA USD SCH [GS]                                                 | SP    | \$250,001 -<br>\$500,000   | Interest       | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Allocate Alpha Fund II LP [OT]<br>DESCRIPTION: Pooled Investment Fund    | SP    | \$100,001 -<br>\$250,000   | None           |                     | <input checked="" type="checkbox"/> |
| Allocate Premier Access Fund [OT]<br>DESCRIPTION: Pooled Investment Fund | SP    | \$250,001 -<br>\$500,000   | None           |                     | <input checked="" type="checkbox"/> |
| American Funds 2025 Trgt Date Retire [MF]                                |       | \$500,001 -<br>\$1,000,000 | Tax-Deferred   |                     | <input type="checkbox"/>            |
| Anaheim CA Hsg Elec Util [GS]                                            | SP    | \$50,001 -<br>\$100,000    | None           |                     | <input checked="" type="checkbox"/> |
| Bank of America [BA]                                                     | SP    | \$50,001 -<br>\$100,000    | None           |                     | <input type="checkbox"/>            |
| Bank of America [BA]                                                     |       | \$250,001 -<br>\$500,000   | Interest       | \$1 - \$200         | <input type="checkbox"/>            |

| Asset                                                                                                                            | Owner | Value of Asset             | Income Type(s)                         | Income                     | Tx. > \$1,000?                      |
|----------------------------------------------------------------------------------------------------------------------------------|-------|----------------------------|----------------------------------------|----------------------------|-------------------------------------|
| Broadview Hghts OH GO UTX [GS]                                                                                                   | SP    | \$50,001 - \$100,000       | Interest                               | \$1,001 - \$2,500          | <input type="checkbox"/>            |
| CA Infra & Dev Bk Comb Util [GS]                                                                                                 | SP    | \$500,001 - \$1,000,000    | Interest                               | \$15,001 - \$50,000        | <input type="checkbox"/>            |
| CA ST UNIV PUB EDUC [GS]                                                                                                         | SP    | \$250,001 - \$500,000      | Interest                               | \$5,001 - \$15,000         | <input type="checkbox"/>            |
| CA ST UNIV PUB EDUC [GS]                                                                                                         | SP    | \$100,001 - \$250,000      | None                                   |                            | <input checked="" type="checkbox"/> |
| Cameron Investment Corp [OT]                                                                                                     | SP    | \$1,001 - \$15,000         | S Corp Income (Cameron Holdings Corp)  | \$100,001 - \$1,000,000    | <input type="checkbox"/>            |
| DESCRIPTION: Family office investor used to hold other assets, securities and income that are separately itemized on this report |       |                            |                                        |                            |                                     |
| Capital Group Dividend Value ETF (CGDV) [EF]                                                                                     |       | \$100,001 - \$250,000      | Dividends                              | \$201 - \$1,000            | <input checked="" type="checkbox"/> |
| Capital Group Dividend Value ETF (CGDV) [EF]                                                                                     | SP    | \$500,001 - \$1,000,000    | Dividends                              | \$2,501 - \$5,000          | <input checked="" type="checkbox"/> |
| Charles Schwab Cash Account [BA]                                                                                                 | SP    | Spouse/DC Over \$1,000,000 | Interest                               | \$201 - \$1,000            | <input type="checkbox"/>            |
| Charles Schwab Cash Account [BA]                                                                                                 |       | \$100,001 - \$250,000      | Interest                               | \$1 - \$200                | <input type="checkbox"/>            |
| CIBC Atlas Disciplined Equity Fund Institutional Class (AWEIX) [MF]                                                              | SP    | Spouse/DC Over \$1,000,000 | Dividends, Capital Gains Distributions | Spouse/DC Over \$1,000,000 | <input checked="" type="checkbox"/> |
| CIBC Atlas Disciplined Equity Fund Institutional Class (AWEIX) [MF]                                                              |       | \$1,000,001 - \$5,000,000  | Dividends, Capital Gains Distributions | \$100,001 - \$1,000,000    | <input checked="" type="checkbox"/> |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF]                                                                |       | \$500,001 - \$1,000,000    | Dividends                              | \$5,001 - \$15,000         | <input checked="" type="checkbox"/> |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF]                                                                | SP    | Spouse/DC Over \$1,000,000 | Dividends                              | \$50,001 - \$100,000       | <input checked="" type="checkbox"/> |
| CIBC Atlas Mid Cap Equity Fund Institutional Class (AWMIX) [MF]                                                                  | SP    | Spouse/DC Over \$1,000,000 | Capital Gains Distributions            | \$100,001 - \$1,000,000    | <input type="checkbox"/>            |

| Asset                                                                   | Owner | Value of Asset             | Income Type(s)   | Income                  | Tx. ><br>\$1,000?                   |
|-------------------------------------------------------------------------|-------|----------------------------|------------------|-------------------------|-------------------------------------|
| City of San Diego Pension [PE]                                          |       | Undetermined               | Pension Benefits | \$15,001 - \$50,000     | <input type="checkbox"/>            |
| Coinfund Liquid Opportunities Onshore [OT]                              | SP    | \$100,001 - \$250,000      | None             |                         | <input type="checkbox"/>            |
| DESCRIPTION: Pooled Investment Fund                                     |       |                            |                  |                         |                                     |
| Columbia Mgmt Advisors - City of San Diego Mngd Inc Fund [MF]           |       | \$1,001 - \$15,000         | Tax-Deferred     |                         | <input type="checkbox"/>            |
| Dublin CA Unified Sch Dist [GS]                                         | SP    | \$500,001 - \$1,000,000    | Interest         | \$15,001 - \$50,000     | <input type="checkbox"/>            |
| East Bay MUD SYS CA [GS]                                                | SP    | None                       | Interest         | \$15,001 - \$50,000     | <input checked="" type="checkbox"/> |
| Enterprise CA Elem Sch Dist Rfdg [GS]                                   | SP    | \$500,001 - \$1,000,000    | Interest         | \$15,001 - \$50,000     | <input type="checkbox"/>            |
| Foothill-DeAnza CCD CA Educ [GS]                                        | SP    | \$500,001 - \$1,000,000    | Interest         | \$15,001 - \$50,000     | <input type="checkbox"/>            |
| GV Christi LLC [OL]                                                     | SP    | \$50,001 - \$100,000       | Interest, Rent   | \$5,001 - \$15,000      | <input type="checkbox"/>            |
| LOCATION: Caldwell, ID, US<br>DESCRIPTION: Own/operate mobile home park |       |                            |                  |                         |                                     |
| GV Livingston LLC [OL]                                                  | SP    | \$15,001 - \$50,000        | Interest, Rent   | \$15,001 - \$50,000     | <input checked="" type="checkbox"/> |
| LOCATION: Livingston, MT, US<br>DESCRIPTION: Mobile Home Park           |       |                            |                  |                         |                                     |
| GV Pines Apartments, LLC [OT]                                           | SP    | \$100,001 - \$250,000      | None             |                         | <input type="checkbox"/>            |
| DESCRIPTION: Single apartment real property interest in Boise, Idaho    |       |                            |                  |                         |                                     |
| Inverted Capital I LP [OT]                                              | SP    | \$100,001 - \$250,000      | None             |                         | <input checked="" type="checkbox"/> |
| DESCRIPTION: Pooled Investment Fund                                     |       |                            |                  |                         |                                     |
| iShares Core S&P 500 ETF (IVV) [EF]                                     | SP    | Spouse/DC Over \$1,000,000 | Dividends        | \$100,001 - \$1,000,000 | <input type="checkbox"/>            |
| iShares Core S&P 500 ETF (IVV) [EF]                                     |       | \$1,000,001 - \$5,000,000  | Dividends        | \$5,001 - \$15,000      | <input type="checkbox"/>            |

| Asset                                               | Owner | Value of Asset             | Income Type(s) | Income                  | Tx. > \$1,000?                      |
|-----------------------------------------------------|-------|----------------------------|----------------|-------------------------|-------------------------------------|
| iShares Russell 1000 Growth ETF (IWF) [EF]          | SP    | Spouse/DC Over \$1,000,000 | Dividends      | \$50,001 - \$100,000    | <input checked="" type="checkbox"/> |
| iShares Russell 1000 Growth Fund (IWF) [EF]         |       | \$500,001 - \$1,000,000    | Dividends      | \$201 - \$1,000         | <input checked="" type="checkbox"/> |
| iShares Russell 2000 Index Fund (IWM) [EF]          |       | \$250,001 - \$500,000      | Dividends      | \$1,001 - \$2,500       | <input checked="" type="checkbox"/> |
| iShares Russell 2000 Index Fund (IWM) [EF]          | SP    | Spouse/DC Over \$1,000,000 | Dividends      | \$15,001 - \$50,000     | <input checked="" type="checkbox"/> |
| iShares Russell Mid-Cap ETF (IWR) [ST]              |       | \$1,000,001 - \$5,000,000  | Dividends      | \$15,001 - \$50,000     | <input checked="" type="checkbox"/> |
| iShares Russell Mid-Cap ETF (IWR) [EF]              | SP    | Spouse/DC Over \$1,000,000 | Dividends      | \$50,001 - \$100,000    | <input type="checkbox"/>            |
| iShares Russell Midcap Growth ETF (IWP) [EF]        | SP    | Spouse/DC Over \$1,000,000 | Dividends      | \$100,001 - \$1,000,000 | <input checked="" type="checkbox"/> |
| iShares Russell Midcap Growth ETF (IWP) [EF]        |       | \$500,001 - \$1,000,000    | Dividends      | \$50,001 - \$100,000    | <input checked="" type="checkbox"/> |
| Kent Street Group LLC [OT]                          | SP    | \$15,001 - \$50,000        | None           |                         | <input checked="" type="checkbox"/> |
| DESCRIPTION: Pooled Investment Fund/Venture Capital |       |                            |                |                         |                                     |
| Los Angeles CA FINL SCH [GS]                        | SP    | None                       | Interest       | \$2,501 - \$5,000       | <input checked="" type="checkbox"/> |
| Los Angeles CA GO UTX [GS]                          | SP    | \$500,001 - \$1,000,000    | Interest       | \$15,001 - \$50,000     | <input type="checkbox"/>            |
| Los Angeles CA IMPTSch [GS]                         | SP    | \$500,001 - \$1,000,000    | Interest       | \$15,001 - \$50,000     | <input type="checkbox"/>            |
| Los Angeles CA Wtr Swr Util [GS]                    | SP    | \$500,001 - \$1,000,000    | Interest       | \$5,001 - \$15,000      | <input checked="" type="checkbox"/> |
| Los Angeles County Excise Tax [GS]                  | SP    | \$250,001 - \$500,000      | Interest       | \$15,001 - \$50,000     | <input type="checkbox"/>            |
| Los Angeles, CA Dept. of Water & Power [GS]         | SP    | \$500,001 - \$1,000,000    | Interest       | \$15,001 - \$50,000     | <input type="checkbox"/>            |

| Asset                                                                  | Owner | Value of Asset             | Income Type(s)               | Income                     | Tx. > \$1,000?                      |
|------------------------------------------------------------------------|-------|----------------------------|------------------------------|----------------------------|-------------------------------------|
| Lynett Capital Partners II LP [OT]                                     | SP    | \$100,001 - \$250,000      | None                         |                            | <input type="checkbox"/>            |
| DESCRIPTION: Pooled Investment Fund/Venture Capital                    |       |                            |                              |                            |                                     |
| Lynett Capital Partners III, LP [OT]                                   | SP    | \$500,001 - \$1,000,000    | None                         |                            | <input checked="" type="checkbox"/> |
| DESCRIPTION: Pooled Investment Fund/Venture Capital                    |       |                            |                              |                            |                                     |
| Mammoth CA USD IMPT SCH [GS]                                           | SP    | None                       | Interest                     | \$2,501 - \$5,000          | <input checked="" type="checkbox"/> |
| Manufacturers Drive LLC [OT]                                           | SP    | \$500,001 - \$1,000,000    | Rent                         | \$100,001 - \$1,000,000    | <input type="checkbox"/>            |
| DESCRIPTION: Owns single commercial real estate property in Arnold, MO |       |                            |                              |                            |                                     |
| Mariposa CTY, CA IMPT SCH [GS]                                         | SP    | \$100,001 - \$250,000      | Interest                     | \$2,501 - \$5,000          | <input type="checkbox"/>            |
| MFS Municipal High Income Fd Cl I (MMIIX) [MF]                         |       | None                       | Dividends                    | \$5,001 - \$15,000         | <input checked="" type="checkbox"/> |
| MFS Municipal High Income Fd Cl I (MMIIX) [MF]                         | SP    | None                       | Dividends                    | \$50,001 - \$100,000       | <input checked="" type="checkbox"/> |
| Motesto CA Waste [GS]                                                  | SP    | \$100,001 - \$250,000      | None                         |                            | <input checked="" type="checkbox"/> |
| Multi-Pack Solutions LLC [OL]                                          | SP    | Spouse/DC Over \$1,000,000 | Interest, partnership Income | Spouse/DC Over \$1,000,000 | <input type="checkbox"/>            |
| LOCATION: Mt. Prospect, IL, US<br>DESCRIPTION: Packaging Company       |       |                            |                              |                            |                                     |
| Novato CA USD IMPT SCH [GS]                                            | SP    | \$50,001 - \$100,000       | Interest                     | \$1,001 - \$2,500          | <input type="checkbox"/>            |
| Oceanside CA IMPT SCH [GS]                                             | SP    | \$500,001 - \$1,000,000    | Interest                     | \$15,001 - \$50,000        | <input type="checkbox"/>            |
| Palmdale CA Sch [GS]                                                   | SP    | \$100,001 - \$250,000      | None                         |                            | <input checked="" type="checkbox"/> |
| Paris TX, GO LTX [GS]                                                  | SP    | \$250,001 - \$500,000      | Interest                     | \$5,001 - \$15,000         | <input type="checkbox"/>            |
| Pasadena CA Area CC Educ [GS]                                          | SP    | \$250,001 - \$500,000      | Interest                     | \$5,001 - \$15,000         | <input type="checkbox"/>            |

| Asset                                                                                                    | Owner | Value of Asset             | Income Type(s) | Income               | Tx. ><br>\$1,000?                   |
|----------------------------------------------------------------------------------------------------------|-------|----------------------------|----------------|----------------------|-------------------------------------|
| Pittsburg CA Wtr Util [GS]                                                                               | SP    | \$250,001 - \$500,000      | Interest       | \$5,001 - \$15,000   | <input type="checkbox"/>            |
| Rancho Corte Madera, Inc. [OL]<br><br>LOCATION: Pine Valley, CA, US<br>DESCRIPTION: Working Cattle Ranch |       | \$1,000,001 - \$5,000,000  | None           |                      | <input type="checkbox"/>            |
| Regeneration VC Fund 1 LP [HE]                                                                           | SP    | \$250,001 - \$500,000      | None           |                      | <input checked="" type="checkbox"/> |
| Riverside CA Elec Util [GS]                                                                              | SP    | Spouse/DC Over \$1,000,000 | Interest       | \$50,001 - \$100,000 | <input type="checkbox"/>            |
| Riverside CA Sewer Util [GS]                                                                             | SP    | None                       | Interest       | \$5,001 - \$15,000   | <input checked="" type="checkbox"/> |
| Sacramento CA WTR UTIL [GS]                                                                              | SP    | None                       | Interest       | \$2,501 - \$5,000    | <input checked="" type="checkbox"/> |
| Sacramento Muni Util Dist [GS]                                                                           | SP    | \$250,001 - \$500,000      | Interest       | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| San Carlos CA SD Impt Sch [GS]                                                                           | SP    | \$500,001 - \$1,000,000    | Interest       | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| San Diego CA Trans Excise Tax [GS]                                                                       | SP    | \$100,001 - \$250,000      | Interest       | \$5,001 - \$15,000   | <input type="checkbox"/>            |
| San Diego CA UNI GO UTX [GS]                                                                             | SP    | \$250,001 - \$500,000      | Interest       | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| San Diego CA WTR UTIL [GS]                                                                               | SP    | \$50,001 - \$100,000       | Interest       | \$2,501 - \$5,000    | <input type="checkbox"/>            |
| San Diego, CA IMPT SCH [GS]                                                                              | SP    | \$50,001 - \$100,000       | Interest       | \$2,501 - \$5,000    | <input type="checkbox"/>            |
| San Francisco CA Bay Mass Tran [GS]                                                                      | SP    | \$50,001 - \$100,000       | None           |                      | <input checked="" type="checkbox"/> |
| San Francisco CA Sewer Util [GS]                                                                         | SP    | None                       | Interest       | \$2,501 - \$5,000    | <input checked="" type="checkbox"/> |
| San Jose CA Uni Sch [GS]                                                                                 | SP    | \$500,001 -                | None           |                      | <input checked="" type="checkbox"/> |

| Asset                                                                 | Owner | Value of Asset             | Income Type(s)                                         | Income                  | Tx. ><br>\$1,000?                   |
|-----------------------------------------------------------------------|-------|----------------------------|--------------------------------------------------------|-------------------------|-------------------------------------|
| \$1,000,000                                                           |       |                            |                                                        |                         |                                     |
| San Juan, CA USD [GS]                                                 | SP    | \$500,001 - \$1,000,000    | Interest                                               | \$15,001 - \$50,000     | <input checked="" type="checkbox"/> |
| Santa Clara CN CA HLTH [GS]                                           | SP    | None                       | Interest                                               | \$1,001 - \$2,500       | <input checked="" type="checkbox"/> |
| Schwab California Municipal Money Fund - Investor Shares (SWKXX) [MF] | SP    | \$100,001 - \$250,000      | Dividends                                              | \$1,001 - \$2,500       | <input type="checkbox"/>            |
| Schwab California Municipal Money Fund - Investor Shares (SWKXX) [MF] |       | \$100,001 - \$250,000      | Dividends, Capital Gains Distributions                 | \$201 - \$1,000         | <input type="checkbox"/>            |
| Schwab California Municipal Money Fund Ultra Shares (SCAXX) [MF]      | SP    | Spouse/DC Over \$1,000,000 | Dividends, Capital Gains Distributions                 | \$5,001 - \$15,000      | <input type="checkbox"/>            |
| Schwab Government Money Fund - Investor Shares (SNVXX) [MF]           | SP    | \$100,001 - \$250,000      | Dividends, Capital Gains Distributions                 | \$2,501 - \$5,000       | <input type="checkbox"/>            |
| Schwab Treasury Obligations Money Fund Ultra Shares (SCOXX) [MF]      | SP    | Spouse/DC Over \$1,000,000 | Dividends, Capital Gains Distributions                 | \$50,001 - \$100,000    | <input type="checkbox"/>            |
| Sinclair & Rush [OL]                                                  | SP    | \$250,001 - \$500,000      | None                                                   |                         | <input type="checkbox"/>            |
| LOCATION: Arnold, MO, US<br>DESCRIPTION: Manufacturing Company        |       |                            |                                                        |                         |                                     |
| Solano CA CCD Educ [GS]                                               | SP    | \$250,001 - \$500,000      | Interest                                               | \$5,001 - \$15,000      | <input type="checkbox"/>            |
| SPDR Series Trust SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]       | SP    | None                       | Dividends                                              | \$100,001 - \$1,000,000 | <input checked="" type="checkbox"/> |
| SPDR Series Trust SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]       |       | None                       | Dividends                                              | \$5,001 - \$15,000      | <input checked="" type="checkbox"/> |
| StepStone Tactical Growth Fund III, LP [HE]                           | SP    | \$250,001 - \$500,000      | Capital Gains, Dividends, Interest, partnership Income | \$15,001 - \$50,000     | <input type="checkbox"/>            |

| Asset                                          | Owner | Value of Asset             | Income Type(s)          | Income                  | Tx. > \$1,000?                      |
|------------------------------------------------|-------|----------------------------|-------------------------|-------------------------|-------------------------------------|
| Torch Capital III LP [OT]                      | SP    | \$50,001 - \$100,000       | None                    |                         | <input checked="" type="checkbox"/> |
| DESCRIPTION: Pooled Investment Fund            |       |                            |                         |                         |                                     |
| U.S Treasury Bills [GS]                        | SP    | Spouse/DC Over \$1,000,000 | Capital Gains, Interest | \$15,001 - \$50,000     | <input checked="" type="checkbox"/> |
| U.S. Treasury Notes [GS]                       | SP    | Spouse/DC Over \$1,000,000 | Interest                | \$100,001 - \$1,000,000 | <input checked="" type="checkbox"/> |
| UNIV CA PUB EDUC [GS]                          | SP    | \$50,001 - \$100,000       | Interest                | \$2,501 - \$5,000       | <input type="checkbox"/>            |
| Upper Sta Clr JPA Wtr Util [GS]                | SP    | \$100,001 - \$250,000      | Interest                | \$2,501 - \$5,000       | <input type="checkbox"/>            |
| Valo Ventures GP II, LP [OT]                   | SP    | \$100,001 - \$250,000      | None                    |                         | <input checked="" type="checkbox"/> |
| DESCRIPTION: Venture Capital Fund              |       |                            |                         |                         |                                     |
| Vanguard FTSE Developed Markets ETF (VEA) [EF] |       | \$500,001 - \$1,000,000    | Dividends               | \$15,001 - \$50,000     | <input checked="" type="checkbox"/> |
| Vanguard FTSE Developed Markets ETF (VEA) [EF] | SP    | Spouse/DC Over \$1,000,000 | Dividends               | \$100,001 - \$1,000,000 | <input checked="" type="checkbox"/> |
| Vanguard FTSE Emerging Markets ETF (VWO) [EF]  | SP    | Spouse/DC Over \$1,000,000 | Dividends               | \$201 - \$1,000         | <input checked="" type="checkbox"/> |
| Vanguard LifeStrategy Moderate [MF]            | SP    | Spouse/DC Over \$1,000,000 | Tax-Deferred            |                         | <input type="checkbox"/>            |
| Vanguard Mid-Cap ETF (VO) [EF]                 |       | \$15,001 - \$50,000        | Tax-Deferred            |                         | <input type="checkbox"/>            |
| Vanguard Mid-Cap ETF (VO) [EF]                 | SP    | Spouse/DC Over \$1,000,000 | Dividends               | \$50,001 - \$100,000    | <input checked="" type="checkbox"/> |
| Vanguard S&P 500 ETF (VOO) [EF]                |       | \$50,001 - \$100,000       | Dividends               | \$201 - \$1,000         | <input type="checkbox"/>            |
| Vanguard S&P 500 ETF (VOO) [EF]                | SP    | Spouse/DC Over \$1,000,000 | Dividends               | \$50,001 - \$100,000    | <input checked="" type="checkbox"/> |
| Vanguard Small-Cap ETF (VB) [EF]               | SP    | Spouse/DC Over             | Dividends               | \$50,001 - \$100,000    | <input checked="" type="checkbox"/> |

| Asset                                                            | Owner | Value of Asset             | Income Type(s) | Income               | Tx. > \$1,000?                      |
|------------------------------------------------------------------|-------|----------------------------|----------------|----------------------|-------------------------------------|
|                                                                  |       | \$1,000,000                |                |                      | <input type="checkbox"/>            |
| Vanguard Small-Cap ETF (VB) [EF]                                 |       | \$15,001 - \$50,000        | Dividends      | \$5,001 - \$15,000   | <input checked="" type="checkbox"/> |
| Vanguard Total Stock Market ETF (VTI) [EF]                       | SP    | Spouse/DC Over \$1,000,000 | Dividends      | \$50,001 - \$100,000 | <input checked="" type="checkbox"/> |
| Vanguard Total Stock Market ETF (VTI) [EF]                       |       | \$50,001 - \$100,000       | Tax-Deferred   |                      | <input type="checkbox"/>            |
| Vanguard Value ETF (VTV) [EF]                                    | SP    | \$250,001 - \$500,000      | Dividends      | \$5,001 - \$15,000   | <input type="checkbox"/>            |
| Visalia CA Uni IMPT SCH [GS]                                     | SP    | \$500,001 - \$1,000,000    | Interest       | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| Winward Academy, LLC [OL]                                        |       | \$1,001 - \$15,000         | None           |                      | <input type="checkbox"/>            |
| LOCATION: San Diego, CA, US<br>DESCRIPTION: Educational Training |       |                            |                |                      |                                     |
| Lynett Capital Partners V ⇒ ABL Space Systems [PS]               | SP    | \$100,001 - \$250,000      | None           |                      | <input type="checkbox"/>            |
| DESCRIPTION: Partnership Interest                                |       |                            |                |                      |                                     |

\* 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?      |
|---------------------------------------------------------------------|-------|------------|-------------|-------------------------|--------------------------|
| U.S Treasury Bills [GS]                                             | SP    | 01/28/2025 | S (partial) | \$250,001 - \$500,000   | <input type="checkbox"/> |
| Kent Street Group LLC [OT]                                          | SP    | 01/10/2025 | P           | \$15,001 - \$50,000     |                          |
| LOCATION: US<br>DESCRIPTION: Pooled Investment Fund/Venture Capital |       |            |             |                         |                          |
| U.S Treasury Bills [GS]                                             | SP    | 02/03/2025 | P           | \$250,001 - \$500,000   |                          |
| U.S Treasury Bills [GS]                                             | SP    | 03/27/2025 | S (partial) | \$500,001 - \$1,000,000 | <input type="checkbox"/> |

| Asset                                                                                             | Owner | Date       | Tx. Type    | Amount                  | Cap. Gains > \$200?      |
|---------------------------------------------------------------------------------------------------|-------|------------|-------------|-------------------------|--------------------------|
| U.S Treasury Bills [GS]                                                                           | SP    | 03/31/2025 | P           | \$500,001 - \$1,000,000 |                          |
| Kent Street Group LLC [OT]<br>LOCATION: US<br>DESCRIPTION: Pooled Investment Fund/Venture Capital | SP    | 04/14/2025 | P           | \$15,001 - \$50,000     |                          |
| U.S Treasury Bills [GS]                                                                           | SP    | 04/11/2025 | S (partial) | \$250,001 - \$500,000   | <input type="checkbox"/> |
| Lynett Capital Partners III [OI]<br>DESCRIPTION: Pooled Investment Fund/Venture Capital           | SP    | 05/21/2025 | P           | \$100,001 - \$250,000   |                          |
| Allocate Premier Access Fund [OI]<br>DESCRIPTION: Pooled Investment Fund                          | SP    | 05/23/2025 | P           | \$15,001 - \$50,000     |                          |
| Allocate Alpha Fund II LP [OI]<br>DESCRIPTION: Pooled Investment Fund                             | SP    | 05/27/2025 | P           | \$15,001 - \$50,000     |                          |
| Allocate Alpha Fund II LP [OI]<br>DESCRIPTION: Pooled Investment Fund                             | SP    | 06/24/2025 | P           | \$1,001 - \$15,000      |                          |
| Allocate Premier Access Fund [OI]<br>DESCRIPTION: Pooled Investment Fund                          | SP    | 06/23/2025 | P           | \$15,001 - \$50,000     |                          |
| Valo Ventures GP II, LP [OI]<br>DESCRIPTION: Pooled Investment Fund                               | SP    | 06/25/2025 | P           | \$15,001 - \$50,000     |                          |
| U.S Treasury Bills [GS]                                                                           | SP    | 06/12/2025 | S (partial) | \$100,001 - \$250,000   | <input type="checkbox"/> |
| U.S Treasury Bills [GS]                                                                           | SP    | 06/16/2025 | P           | \$100,001 - \$250,000   |                          |
| Kent Street Group LLC [OT]<br>LOCATION: US<br>DESCRIPTION: Pooled Investment Fund/Venture Capital | SP    | 07/24/2025 | P           | \$15,001 - \$50,000     |                          |
| GV Livingston LLC [OL]<br>LOCATION: Livingston, MT, US                                            | SP    | 07/03/2025 | P           | \$50,001 - \$100,000    |                          |

| Asset                                               | Owner | Date       | Tx. Type    | Amount                  | Cap. Gains > \$200?      |
|-----------------------------------------------------|-------|------------|-------------|-------------------------|--------------------------|
| DESCRIPTION: Mobile Home Park                       |       |            |             |                         |                          |
| Los Angeles CA FINL SCH [GS]                        | SP    | 07/01/2025 | S           | \$50,001 - \$100,000    | <input type="checkbox"/> |
| U.S Treasury Bills [GS]                             | SP    | 07/31/2025 | S (partial) | \$250,001 - \$500,000   | <input type="checkbox"/> |
| U.S Treasury Bills [GS]                             | SP    | 08/01/2025 | P           | \$250,001 - \$500,000   |                          |
| San Juan CA USD IMPT SCH [GS]                       | SP    | 08/01/2025 | S (partial) | \$100,001 - \$250,000   | <input type="checkbox"/> |
| San Jose CA Uni Sch [GS]                            | SP    | 08/05/2025 | P           | \$500,001 - \$1,000,000 |                          |
| Mammoth CA USD IMPT SCH [GS]                        | SP    | 08/01/2025 | S           | \$50,001 - \$100,000    | <input type="checkbox"/> |
| Santa Clara CN CA HLTH [GS]                         | SP    | 08/01/2025 | S           | \$15,001 - \$50,000     | <input type="checkbox"/> |
| CA ST UNIV PUB EDUC [GS]                            | SP    | 08/05/2025 | P           | \$100,001 - \$250,000   |                          |
| East Bay MUD SYS CA [GS]                            | SP    | 06/02/2025 | S           | \$50,001 - \$100,000    | <input type="checkbox"/> |
| Los Angeles CA Wtr Swr Util [GS]                    | SP    | 06/10/2025 | P           | \$100,001 - \$250,000   |                          |
| San Francisco CA Bay Mass Tran [GS]                 | SP    | 09/09/2025 | P           | \$50,001 - \$100,000    |                          |
| Anaheim CA Hsg Elec Util [GS]                       | SP    | 09/10/2025 | P           | \$50,001 - \$100,000    |                          |
| Inverted Capital I LP [OT]                          | SP    | 09/03/2025 | P           | \$100,001 - \$250,000   |                          |
| LOCATION: US<br>DESCRIPTION: Pooled Investment Fund |       |            |             |                         |                          |
| Allocate Premier Access Fund [OT]                   | SP    | 09/22/2025 | P           | \$15,001 - \$50,000     |                          |

| Asset                                               | Owner | Date       | Tx. Type    | Amount                | Cap. Gains > \$200?                 |
|-----------------------------------------------------|-------|------------|-------------|-----------------------|-------------------------------------|
| LOCATION: US<br>DESCRIPTION: Pooled Investment Fund |       |            |             |                       |                                     |
| Allocate Alpha Fund II LP [OT]                      | SP    | 09/24/2025 | P           | \$15,001 - \$50,000   |                                     |
| LOCATION: US<br>DESCRIPTION: Pooled Investment Fund |       |            |             |                       |                                     |
| U.S Treasury Bills [GS]                             | SP    | 09/25/2025 | S (partial) | \$15,001 - \$50,000   | <input checked="" type="checkbox"/> |
| Inverted Capital I LP [OT]                          | SP    | 09/25/2025 | P           | \$50,001 - \$100,000  |                                     |
| LOCATION: US<br>DESCRIPTION: Pooled Investment Fund |       |            |             |                       |                                     |
| U.S Treasury Bills [GS]                             | SP    | 09/04/2025 | S (partial) | \$100,001 - \$250,000 | <input type="checkbox"/>            |
| U.S Treasury Bills [GS]                             | SP    | 09/08/2025 | S (partial) | \$50,001 - \$100,000  | <input checked="" type="checkbox"/> |
| U.S Treasury Bills [GS]                             | SP    | 09/08/2025 | P           | \$100,001 - \$250,000 |                                     |
| Riverside CA Sewer Util [GS]                        | SP    | 09/29/2025 | S           | \$100,001 - \$250,000 | <input type="checkbox"/>            |
| San Francisco CA Sewer Util [GS]                    | SP    | 10/01/2025 | S           | \$50,001 - \$100,000  | <input type="checkbox"/>            |
| U.S Treasury Bills [GS]                             | SP    | 10/02/2025 | S (partial) | \$15,001 - \$50,000   | <input type="checkbox"/>            |
| U.S Treasury Bills [GS]                             | SP    | 10/06/2025 | P           | \$15,001 - \$50,000   |                                     |
| Kent Street Group LLC [OI]                          | SP    | 11/20/2025 | P           | \$15,001 - \$50,000   |                                     |
| DESCRIPTION: Poole Investment Fund/Venture Capital  |       |            |             |                       |                                     |
| Allocate Alpha Fund II LP [OT]                      | SP    | 11/19/2025 | P           | \$15,001 - \$50,000   |                                     |
| LOCATION: US<br>DESCRIPTION: Pooled Investment Fund |       |            |             |                       |                                     |
| Allocate Premier Access Fund [OT]                   | SP    | 12/19/2025 | P           | \$15,001 - \$50,000   |                                     |

| Asset                                               | Owner | Date       | Tx. Type    | Amount                  | Cap. Gains > \$200?                 |
|-----------------------------------------------------|-------|------------|-------------|-------------------------|-------------------------------------|
| LOCATION: US<br>DESCRIPTION: Pooled Investment Fund |       |            |             |                         |                                     |
| Allocate Alpha Fund II LP [OT]                      | SP    | 12/19/2025 | P           | \$1,001 - \$15,000      |                                     |
| LOCATION: US<br>DESCRIPTION: Pooled Investment Fund |       |            |             |                         |                                     |
| U.S Treasury Bills [GS]                             | SP    | 12/26/2025 | S (partial) | \$100,001 - \$250,000   | <input type="checkbox"/>            |
| U.S Treasury Bills [GS]                             | SP    | 12/29/2025 | P           | \$100,001 - \$250,000   |                                     |
| U.S Treasury Bills [GS]                             | SP    | 12/04/2025 | S (partial) | \$50,001 - \$100,000    | <input type="checkbox"/>            |
| U.S Treasury Bills [GS]                             | SP    | 12/08/2025 | P           | \$50,001 - \$100,000    |                                     |
| Motesto CA Waste [GS]                               | SP    | 11/12/2025 | P           | \$100,001 - \$250,000   |                                     |
| Palmdale CA Sch [GS]                                | SP    | 11/19/2025 | P           | \$100,001 - \$250,000   |                                     |
| U.S. Treasury Notes [GS]                            | SP    | 11/18/2025 | S (partial) | \$500,001 - \$1,000,000 | <input checked="" type="checkbox"/> |
| Sacramento CA WTR UTIL [GS]                         | SP    | 11/03/2025 | S           | \$100,001 - \$250,000   | <input type="checkbox"/>            |
| Regeneration VC Fund 1 LP [HE]                      | SP    | 03/12/2025 | P           | \$15,001 - \$50,000     |                                     |
| Valo Ventures GP II, LP [OT]                        | SP    | 03/21/2025 | P           | \$15,001 - \$50,000     |                                     |
| LOCATION: US<br>DESCRIPTION: Venture Capital Fund   |       |            |             |                         |                                     |
| Allocate Premier Access Fund [OT]                   | SP    | 03/25/2025 | P           | \$15,001 - \$50,000     |                                     |
| LOCATION: US<br>DESCRIPTION: Pooled Investment Fund |       |            |             |                         |                                     |
| Allocate Alpha Fund II LP [OT]                      | SP    | 03/28/2025 | P           | \$15,001 - \$50,000     |                                     |
| LOCATION: US                                        |       |            |             |                         |                                     |

| Asset                                                             | Owner | Date       | Tx. Type | Amount                     | Cap. Gains > \$200? |
|-------------------------------------------------------------------|-------|------------|----------|----------------------------|---------------------|
| DESCRIPTION: Pooled Investment Fund                               |       |            |          |                            |                     |
| Torch Capital III LP [OT]                                         | SP    | 03/28/2025 | P        | \$15,001 - \$50,000        |                     |
| LOCATION: US                                                      |       |            |          |                            |                     |
| DESCRIPTION: Pooled Investment Fund                               |       |            |          |                            |                     |
| Vanguard S&P 500 ETF (VOO) [EF]                                   | SP    | 01/03/2025 | P        | \$50,001 - \$100,000       |                     |
| Vanguard Small-Cap ETF (VB) [EF]                                  | SP    | 01/03/2025 | P        | \$50,001 - \$100,000       |                     |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF] | SP    | 03/27/2025 | P        | Spouse/DC Over \$1,000,000 |                     |
| iShares Russell 2000 Index Fund (IWM) [EF]                        | SP    | 03/27/2025 | P        | \$50,001 - \$100,000       |                     |
| Vanguard FTSE Developed Markets ETF (VEA) [EF]                    | SP    | 03/27/2025 | P        | \$500,001 - \$1,000,000    |                     |
| Vanguard Mid-Cap ETF (VO) [EF]                                    | SP    | 03/27/2025 | P        | \$100,001 - \$250,000      |                     |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF] | SP    | 05/01/2025 | P        | \$250,001 - \$500,000      |                     |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF] | SP    | 08/15/2025 | P        | \$500,001 - \$1,000,000    |                     |
| iShares Russell 1000 Growth Fund (IWF) [EF]                       | SP    | 08/15/2025 | P        | Spouse/DC Over \$1,000,000 |                     |
| Vanguard FTSE Developed Markets ETF (VEA) [EF]                    | SP    | 08/15/2025 | P        | Spouse/DC Over \$1,000,000 |                     |
| iShares Russell 2000 Index Fund (IWM) [EF]                        | SP    | 08/29/2025 | P        | \$100,001 - \$250,000      |                     |
| Vanguard FTSE Emerging Markets ETF (VWO) [EF]                     | SP    | 12/19/2025 | P        | \$500,001 - \$1,000,000    |                     |
| Capital Group Dividend Value ETF (CGDV) [EF]                      | SP    | 12/31/2025 | P        | \$500,001 - \$1,000,000    |                     |

| Asset                                                               | Owner | Date       | Tx. Type    | Amount                     | Cap. Gains > \$200?                 |
|---------------------------------------------------------------------|-------|------------|-------------|----------------------------|-------------------------------------|
| Vanguard S&P 500 ETF (VOO) [EF]                                     | SP    | 01/10/2025 | S (partial) | \$15,001 - \$50,000        | <input type="checkbox"/>            |
| MFS Municipal High Income Fd Cl I (MMIIX) [MF]                      | SP    | 03/19/2025 | S (partial) | \$50,001 - \$100,000       | <input checked="" type="checkbox"/> |
| iShares Russell 1000 Growth Fund (IWF) [EF]                         | SP    | 03/27/2025 | S (partial) | Spouse/DC Over \$1,000,000 | <input checked="" type="checkbox"/> |
| iShares Russell Midcap Growth ETF (IWP) [EF]                        | SP    | 03/27/2025 | S (partial) | \$100,001 - \$250,000      | <input checked="" type="checkbox"/> |
| Vanguard Small-Cap ETF (VB) [EF]                                    | SP    | 03/27/2025 | S (partial) | \$50,001 - \$100,000       | <input type="checkbox"/>            |
| Vanguard S&P 500 ETF (VOO) [EF]                                     | SP    | 03/27/2025 | S (partial) | \$500,001 - \$1,000,000    | <input type="checkbox"/>            |
| iShares Russell 1000 Growth Fund (IWF) [EF]                         | SP    | 04/09/2025 | S (partial) | \$500,001 - \$1,000,000    | <input checked="" type="checkbox"/> |
| State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]          | SP    | 04/09/2025 | S (partial) | \$100,001 - \$250,000      | <input type="checkbox"/>            |
| iShares Russell 1000 Growth Fund (IWF) [EF]                         | SP    | 05/01/2025 | S (partial) | \$250,001 - \$500,000      | <input checked="" type="checkbox"/> |
| CIBC Atlas Disciplined Equity Fund Institutional Class (AWEIX) [MF] | SP    | 08/15/2025 | S (partial) | Spouse/DC Over \$1,000,000 | <input checked="" type="checkbox"/> |
| MFS Municipal High Income Fd Cl I (MMIIX) [MF]                      | SP    | 08/15/2025 | S           | \$500,001 - \$1,000,000    | <input type="checkbox"/>            |
| Vanguard Total Stock Market ETF (VTI) [EF]                          | SP    | 01/08/2025 | P           | \$1,001 - \$15,000         |                                     |
| Vanguard FTSE Emerging Markets ETF (VWO) [EF]                       | SP    | 10/22/2025 | P           | \$500,001 - \$1,000,000    |                                     |
| Vanguard Total Stock Market ETF (VTI) [EF]                          | SP    | 02/07/2025 | P           | \$1,001 - \$15,000         |                                     |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF]   | SP    | 03/27/2025 | P           | \$15,001 - \$50,000        |                                     |

| Asset                                                             | Owner | Date       | Tx. Type    | Amount                    | Cap. Gains > \$200?                 |
|-------------------------------------------------------------------|-------|------------|-------------|---------------------------|-------------------------------------|
| Vanguard FTSE Developed Markets ETF (VEA) [EF]                    | SP    | 03/27/2025 | P           | \$15,001 - \$50,000       |                                     |
| iShares Russell 1000 Growth Fund (IWF) [EF]                       | SP    | 03/27/2025 | S           | \$50,001 - \$100,000      | <input type="checkbox"/>            |
| State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]        | SP    | 05/01/2025 | S (partial) | \$500,001 - \$1,000,000   | <input type="checkbox"/>            |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF] | SP    | 05/01/2025 | P           | \$500,001 - \$1,000,000   |                                     |
| Vanguard Small-Cap ETF (VB) [EF]                                  |       | 01/03/2025 | P           | \$50,001 - \$100,000      |                                     |
| MFS Municipal High Income Fd Cl I (MMIIX) [MF]                    |       | 01/10/2025 | S (partial) | \$50,001 - \$100,000      | <input checked="" type="checkbox"/> |
| MFS Municipal High Income Fd Cl I (MMIIX) [MF]                    |       | 02/24/2025 | S (partial) | \$100,001 - \$250,000     | <input checked="" type="checkbox"/> |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF] |       | 03/27/2025 | P           | \$500,001 - \$1,000,000   |                                     |
| iShares Russell 2000 Index Fund (IWM) [EF]                        |       | 03/27/2025 | P           | \$100,001 - \$250,000     |                                     |
| Vanguard FTSE Developed Markets ETF (VEA) [EF]                    |       | 03/27/2025 | P           | \$50,001 - \$100,000      |                                     |
| State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]        |       | 03/27/2025 | S           | \$500,001 - \$1,000,000   | <input checked="" type="checkbox"/> |
| Vanguard Small-Cap ETF (VB) [EF]                                  |       | 03/27/2025 | S (partial) | \$100,001 - \$250,000     | <input type="checkbox"/>            |
| Vanguard Small-Cap ETF (VB) [EF]                                  |       | 04/08/2025 | S           | \$1,000,001 - \$5,000,000 | <input type="checkbox"/>            |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF] |       | 05/01/2025 | P           | \$100,001 - \$250,000     |                                     |
| iShares Russell Midcap Growth ETF (IWP) [EF]                      |       | 05/01/2025 | S (partial) | \$100,001 - \$250,000     | <input checked="" type="checkbox"/> |

| Asset                                                               | Owner | Date       | Tx. Type    | Amount                     | Cap. Gains > \$200?                 |
|---------------------------------------------------------------------|-------|------------|-------------|----------------------------|-------------------------------------|
| iShares Russell 1000 Growth Fund (IWF) [EF]                         |       | 08/14/2025 | P           | \$250,001 - \$500,000      |                                     |
| MFS Municipal High Income Fd Cl I (MMIIX) [MF]                      |       | 08/14/2025 | S           | \$250,001 - \$500,000      | <input type="checkbox"/>            |
| iShares Russell Mid-Cap ETF (IWR) [EF]                              |       | 09/05/2025 | S (partial) | \$15,001 - \$50,000        | <input checked="" type="checkbox"/> |
| CIBC Atlas Disciplined Equity Fund Institutional Class (AWEIX) [MF] |       | 11/25/2025 | S (partial) | \$100,001 - \$250,000      | <input checked="" type="checkbox"/> |
| Capital Group Dividend Value ETF (CGDV) [EF]                        |       | 12/19/2025 | P           | \$100,001 - \$250,000      |                                     |
| iShares Russell 1000 Growth Fund (IWF) [EF]                         |       | 12/19/2025 | P           | \$100,001 - \$250,000      |                                     |
| U.S Treasury Bills [GS]                                             | SP    | 06/05/2025 | S (partial) | \$50,001 - \$100,000       | <input type="checkbox"/>            |
| U.S Treasury Bills [GS]                                             | SP    | 06/06/2025 | P           | \$50,001 - \$100,000       |                                     |
| U.S Treasury Notes [GS]                                             | SP    | 06/24/2025 | S (partial) | \$500,001 - \$1,000,000    | <input checked="" type="checkbox"/> |
| U.S Treasury Notes [GS]                                             | SP    | 06/26/2025 | S (partial) | \$100,001 - \$250,000      | <input checked="" type="checkbox"/> |
| Vanguard Small-Cap ETF (VB) [EF]                                    | SP    | 01/03/2025 | P           | \$250,001 - \$500,000      |                                     |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF]   | SP    | 03/27/2025 | P           | Spouse/DC Over \$1,000,000 |                                     |
| iShares Russell 1000 Growth Fund (IWF) [EF]                         | SP    | 03/27/2025 | S (partial) | \$50,001 - \$100,000       | <input type="checkbox"/>            |
| iShares Russell 2000 Index Fund (IWM) [EF]                          | SP    | 03/27/2025 | P           | Spouse/DC Over \$1,000,000 |                                     |
| iShares Russell Midcap Growth ETF (IWP) [EF]                        | SP    | 03/27/2025 | S           | \$100,001 -                | <input checked="" type="checkbox"/> |

| Asset                                                               | Owner | Date       | Tx. Type    | Amount                     | Cap. Gains > \$200?                 |
|---------------------------------------------------------------------|-------|------------|-------------|----------------------------|-------------------------------------|
|                                                                     |       |            | (partial)   | \$250,000                  | <input type="checkbox"/>            |
| State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]          | SP    | 03/27/2025 | S (partial) | Spouse/DC Over \$1,000,000 | <input checked="" type="checkbox"/> |
| Vanguard Small-Cap ETF (VB) [EF]                                    | SP    | 03/27/2025 | S (partial) | Spouse/DC Over \$1,000,000 | <input type="checkbox"/>            |
| Vanguard FTSE Developed Markets ETF (VEA) [EF]                      | SP    | 03/27/2025 | P           | Spouse/DC Over \$1,000,000 |                                     |
| Vanguard Mid-Cap ETF (VO) [EF]                                      | SP    | 03/27/2025 | P           | \$100,001 - \$250,000      |                                     |
| Vanguard Mid-Cap ETF (VO) [EF]                                      | SP    | 03/27/2025 | S (partial) | \$500,001 - \$1,000,000    | <input type="checkbox"/>            |
| iShares Russell 2000 Index Fund (IWM) [EF]                          | SP    | 04/08/2025 | S (partial) | Spouse/DC Over \$1,000,000 | <input type="checkbox"/>            |
| State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]          | SP    | 04/08/2025 | S (partial) | Spouse/DC Over \$1,000,000 | <input type="checkbox"/>            |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF]   | SP    | 05/01/2025 | P           | \$500,001 - \$1,000,000    |                                     |
| CIBC Atlas Disciplined Equity Fund Institutional Class (AWEIX) [MF] | SP    | 08/14/2025 | S (partial) | Spouse/DC Over \$1,000,000 | <input checked="" type="checkbox"/> |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF]   | SP    | 08/14/2025 | P           | Spouse/DC Over \$1,000,000 |                                     |
| iShares Russell 1000 Growth Fund (IWF) [EF]                         | SP    | 08/14/2025 | P           | Spouse/DC Over \$1,000,000 |                                     |
| MFS Municipal High Income Fd Cl I (MMIIX) [MF]                      | SP    | 08/14/2025 | S (partial) | Spouse/DC Over \$1,000,000 | <input type="checkbox"/>            |
| Vanguard FTSE Developed Markets ETF (VEA) [EF]                      | SP    | 08/14/2025 | P           | Spouse/DC Over \$1,000,000 |                                     |
| CIBC Atlas International Growth Fund - Institutional (AWWIX) [MF]   | SP    | 08/18/2025 | P           | \$100,001 - \$250,000      |                                     |

| Asset                                                      | Owner | Date       | Tx. Type    | Amount                  | Cap. Gains > \$200?                 |
|------------------------------------------------------------|-------|------------|-------------|-------------------------|-------------------------------------|
| MFS Municipal High Income Fd Cl I (MMIIX) [MF]             | SP    | 08/18/2025 | S           | \$250,001 - \$500,000   | <input type="checkbox"/>            |
| Vanguard FTSE Developed Markets ETF (VEA) [EF]             | SP    | 08/18/2025 | P           | \$100,001 - \$250,000   |                                     |
| Vanguard Mid-Cap ETF (VO) [EF]                             | SP    | 08/18/2025 | S (partial) | \$100,001 - \$250,000   | <input checked="" type="checkbox"/> |
| Vanguard Total Stock Market ETF (VTI) [EF]                 | SP    | 10/22/2025 | S (partial) | \$500,001 - \$1,000,000 | <input type="checkbox"/>            |
| State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF] | SP    | 05/01/2025 | S           | \$500,001 - \$1,000,000 | <input checked="" type="checkbox"/> |

\* 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      |
|-----------------------|-----------------------------------|-------------|
| Cameron Holdings Corp | Spouse Salary                     | N/A         |
| City of San Diego     | Retirement Plan City of San Diego | \$25,699.00 |
| Sinclair & Rush, Inc. | Spouse Salary                     | N/A         |

SCHEDULE D: LIABILITIES

| Owner | Creditor         | Date Incurred | Type             | Amount of Liability |
|-------|------------------|---------------|------------------|---------------------|
|       | Citibank         | December 2025 | Revolving Credit | \$10,000 - \$15,000 |
|       | Wells Fargo      | December 2025 | Revolving Credit | \$10,000 - \$15,000 |
|       | American Express | December 2025 | Revolving Credit | \$10,000 - \$15,000 |

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

| Date           | Parties To                                                            | Terms of Agreement                           |
|----------------|-----------------------------------------------------------------------|----------------------------------------------|
| December 2008  | Myself and San Diego City Employees Retirement System                 | Continued participation in City pension plan |
| September 1991 | Myself and San Diego County Employees Retirement Association (SDCERA) | Continued participation in SDCERA            |

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

| Trip Details                                  |            |            |                                                 |                  | Inclusions                          |                                     |                          |
|-----------------------------------------------|------------|------------|-------------------------------------------------|------------------|-------------------------------------|-------------------------------------|--------------------------|
| Source                                        | Start Date | End Date   | Itinerary                                       | Days at Own Exp. | Lodging?                            | Food?                               | Family?                  |
| Aspen Institute, Inc. (Congressional Program) | 04/20/2025 | 04/26/2025 | San Diego, CA - Bellagio, Italy - Washington DC | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Climate Resolve                               | 02/27/2025 | 02/28/2025 | Washington DC - Sacramento, CA - Washington DC  | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

|                                         |
|-----------------------------------------|
| ◦ Lynett Capital Partners V (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. Scott H. Peters , 08/12/2026