

United States Senate

Financial Disclosures

Annual Report for Calendar 2024

The Honorable Angus S King Jr. (King, Angus)

📁 Filed 05/12/2025 @ 4:38 PM

The following statements were checked before filing:

- I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.

I *omitted* assets because they meet the three-part test for exemption.

Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **No**

Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Self	Pension	MAINE PUBLIC EMPLOYEES RETIREMENT SYSTEM AUGUSTA, ME	\$35,482.00	n/a
2	Self	Commissions	TRUST U/W/O ROGER C KLINE GENERATION SKIPPING TRUST NEW YORK, NY	\$20,776.00	n/a
3	Self	Commissions	TRUST U/W/O ROGER C KLINE FBO MATTHEW KLINE NEW YORK, NY	\$11,039.00	n/a
4	Self	Retirement	CHAS SCHWAB & CO IRA ROLLOVER #1 SAN FRANCISCO, CA	\$13,500.00	n/a
5	Self	Retirement	CHAS SCHWAB & CO IRA ROLLOVER #2 SAN FRANCISCO, CA	\$19,525.00	n/a
6	Spouse	Pension	MAINE PUBLIC EMPLOYEES RETIREMENT SYSTEM AUGUSTA, ME	> \$1,000	n/a
7	Spouse	Retirement	CHAS SCHWAB & CO IRA ROLLOVER SAN FRANCISCO, CA	> \$1,000	n/a

Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

	Asset	Asset Type	Owner	Value	Income Type	Income
1	POTTER ST BRUNSWICK <i>Description:</i> RESIDENCE AND 2 RENTAL UNITS (BRUNSWICK, ME)	Real Estate Residential	Joint	\$500,001 - \$1,000,000	Rent/Royalties	\$15,001 - \$50,000
2	TD BANK NA AGGREGATE ACCOUNTS (BRUNSWICK, ME) <i>Type:</i> Checking	Bank Deposit	Joint	\$1,001 - \$15,000	Interest	None (or less than \$201)
3	PRUDENTIAL INSURANCE CO WHOLE LIFE POLICY <i>Provider:</i> PRUDENTIAL INSURANCE CO	Life Insurance Whole	Self	\$15,001 - \$50,000	Dividends, Interest	\$1,001 - \$2,500
4	PRUDENTIAL INSURANCE APPRECIABLE LIFE POLICY	Life Insurance Variable	Self	--		
4.1	PSF GOV'T MONEY MARKET <i>Rate/Coupon:</i> None <i>Matures:</i> None <i>Filer comment:</i> UNDERLYING INVESTMENT OF LIFE INSURANCE POLICY	Government Securities US Treasury/Agency Security	Self	\$15,001 - \$50,000	Dividends	None (or less than \$201)
5	MAR-Marriott International, Inc. (NASDAQ)	Corporate Securities Stock	Self	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500
6	HST - Host Hotels & Resorts, Inc. (NYSE)	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends	None (or less than \$201)
7	VAC - Marriott Vacations Worldwide Corp.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends	None (or less than \$201)
8	SCHWAB ONE ACCOUNT	Brokerage/Managed Account	Self	--		
8.1	CHARLES SCHWAB (PORTLAND, ME) <i>Type:</i> Brokerage Sweep Account	Bank Deposit	Self	\$1,001 - \$15,000	Interest	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
8.2	QQQ - Invesco QQQ Trust	Mutual Funds Exchange Traded Fund/Note	Self	\$250,001 - \$500,000	Excepted Investment Fund	\$1,001 - \$2,500
8.3	ILCG - iShares Morningstar Large-Cap Growth ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Excepted Investment Fund	\$1,001 - \$2,500
8.4	PRU - Prudential Financial, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
8.5	JENIX - Jensen Quality Growth Fund Class I	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	Excepted Investment Fund	\$15,001 - \$50,000
8.6	QLD - ProShares Ultra QQQ	Mutual Funds Exchange Traded Fund/Note	Self	\$500,001 - \$1,000,000	Excepted Investment Fund	\$1,001 - \$2,500
8.7	SNSXX SCHWAB US TREASURY MONEY FUND (PORTLAND, ME) Type: Money Market Account	Bank Deposit	Self	None (or less than \$1,001)	None	None (or less than \$201)
8.8	HACAX - Harbor Capital Appreciation Fund Insti Cl	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund	\$5,001 - \$15,000
9	SCHWAB REVOCABLE TRUST	Trust General Trust	Self	--		
9.1	VFIAX - Vanguard 500 Index Admiral (NASDAQ)	Mutual Funds Mutual Fund	Self	\$5,000,001 - \$25,000,000	Excepted Investment Fund	\$50,001 - \$100,000
9.2	VMLUX - Vanguard Limited-Term Tax-Exempt Fund Admiral Shar	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	Excepted Investment Fund	\$201 - \$1,000
9.3	VTEB - Vanguard Tax- Exempt Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
9.4	VTEAX - Vanguard Tax- Exempt Bond Index Fund Admiral Shares	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	Excepted Investment Fund	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
9.5	SNVXX-SCHWAB GOV'T MONEY FUND-INVESTOR SHARES (PORTLAND, ME) Type: Money Market Account	Bank Deposit	Self	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
9.6	CHARLES SCHWAB (PORTLAND, ME) Type: Brokerage Sweep Account	Bank Deposit	Self	\$1,001 - \$15,000	Interest	None (or less than \$201)
9.7	MUB - iShares National Muni Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$500,001 - \$1,000,000	Excepted Investment Fund	\$15,001 - \$50,000
10	SCHWAB IRA ROLLOVER #1	Retirement Plans IRA	Self	--		
10.1	IVE - iShares S&P 500 Value (NYSEArca)	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.2	IVW-iShares S&P 500 Growth (NYSEArca)	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.3	IJJ - iShares S&P Mid-Cap 400 Value (NYSEArca)	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.4	IJK - iShares S&P Mid-Cap 400 Growth (NYSEArca)	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.5	IGIFX - American Funds Intl Gr and Inc F1 (NASDAQ)	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.6	JAMCX - JPMorgan Mid Cap Value A (NASDAQ)	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.7	SGENX - First Eagle Global A (NASDAQ)	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	None	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
10.8	CHARLES SCHWAB (PORTLAND, ME) <i>Type: Brokerage Sweep Account</i>	Bank Deposit	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.9	GNMA - iShares GNMA Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.10	FLOT - iShares Floating Rate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.11	EMB - iShares J.P. Morgan USD Emerging Markets Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.12	IEFA - iShares Core MSCI EAFE ETF	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.13	ICVT - iShares Convertible Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.14	VWO - Vanguard FTSE Emerging Markets ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.15	GIOIX - Guggenheim Macro Opportunities Fund- Institution	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	None	None (or less than \$201)
10.16	SNVXX-SCHWAB GOV'T MONEY FUND-INVESTOR SHARES (PORTLAND, ME) <i>Type: Money Market Account</i>	Bank Deposit	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.17	912796Y45 US TREASURY BILL 5.28% 06/27/2024 <i>Rate/Coupon: None Matures: None</i>	Government Securities US Treasury/Agency Security	Self	None (or less than \$1,001)	None	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
10.18	JR - iShares Core S&P Small-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None	None (or less than \$201)
10.19	AGG - iShares Core U.S. Aggregate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	None	None (or less than \$201)
10.20	IAU - iShares Gold Trust ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.21	VCIT - Vanguard Intermediate-Term Corporate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.22	RGHYX - RBC Bluebay High Yield Bond Fund Class I	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.23	JHEQX - Jpmorgan Hedged Equity Fund I Class	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	None	None (or less than \$201)
10.24	SCHH - Schwab U.S. REIT ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.25	QCLN - First Trust NASDAQ Clean Edge Green Energy Index F	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.26	LMBS - First Trust Low Duration Opportunities ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.27	BUFR - FT Vest Laddered Buffer ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.28	RSP - Invesco S&P 500 Equal Weight ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.29	IBB - iShares Biotechnology ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
10.30	<u>IJH</u> - iShares Core S&P Mid-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.31	<u>IVV</u> - iShares Core S&P 500 ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.32	<u>HEFA</u> - iShares Currency Hedged MSCI EAFE ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.33	<u>GVI</u> - iShares Intermediate Government/Credit Bond ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.34	<u>IGSB</u> - iShares 1-5 Year Investment Grade Corporate Bond E	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.35	<u>IGIB</u> - iShares 5-10 Year Investment Grade Corporate Bond	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.36	<u>JSOSX</u> - Jpmorgan Strategic Income Opportunities Fund I C	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.37	<u>SCHG</u> - Schwab U.S. Large-Cap Growth ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.38	<u>SCHV</u> - Schwab U.S. Large-Cap Value ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.39	<u>VOX</u> - Vanguard Communication Services ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.40	<u>VIG</u> - Vanguard Div Appreciation ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.41	<u>VFH</u> - Vanguard Financials ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
10.42	VHT - Vanguard Health Care ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.43	VYM - Vanguard High Dividend Yield ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10.44	VPU - Vanguard Utilities ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None	None (or less than \$201)
11	SCHWAB IRA ROLLOVER #2	Retirement Plans IRA	Self	--		
11.1	WPSGX - AB Concentrated Growth Advisor (NASDAQ)	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	None	None (or less than \$201)
11.2	CHARLES SCHWAB (PORTLAND, ME) Type: Brokerage Sweep Account	Bank Deposit	Self	None (or less than \$1,001)	None	None (or less than \$201)
11.3	QLD - ProShares Ultra QQQ	Mutual Funds Exchange Traded Fund/Note	Self	\$250,001 - \$500,000	None	None (or less than \$201)
11.4	SNSXX SCHWAB US TREASURY MONEY FUND (PORTLAND, ME) Type: Money Market Account	Bank Deposit	Self	None (or less than \$1,001)	None	None (or less than \$201)
11.5	HACAX - Harbor Capital Appreciation Fund Insti Cl	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	None	None (or less than \$201)
12	SCHWAB ONE ACCT - MJH	Brokerage/Managed Account	Spouse	--		
12.1	ECL-Ecolab Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	None (or less than \$201)
12.2	DIS-The Walt Disney Company (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
12.3	<u>NKE</u> - Nike, Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
12.4	TJX-The TJX Companies, Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
12.5	<u>KMB</u> - Kimberly-Clark Corporation (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
12.6	<u>MKC</u> - McCormick & Company, Incorporated (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
12.7	<u>PEP</u> - Pepsico, Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
12.8	<u>AXP</u> - American Express Company (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
12.9	CME-CME Group Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
12.10	<u>IYF</u> - iShares US Financials	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	\$201 - \$1,000
12.11	<u>GILD</u>-Gilead Sciences Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
12.12	<u>JNJ</u> - Johnson & Johnson (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
12.13	<u>WAT</u>-Waters Corporation (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	None	None (or less than \$201)
12.14	<u>NSC</u> - Norfolk Southern Corporation (NYSE)	Corporate Securities Stock	Spouse	None (or less than \$1,001)	Dividends	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
12.15	UPS - United Parcel Service, Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
12.16	AAPL-Apple Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	None (or less than \$201)
12.17	CSCO-Cisco Systems, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
12.18	ORCL-Oracle Corporation (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends	None (or less than \$201)
12.19	NEE - NextEra Energy, Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
12.20	EFA-iShares MSCI EAFE	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	\$201 - \$1,000
12.21	MGIAX - MFS International Value A (NASDAQ)	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	\$1,001 - \$2,500
12.22	GTEYX - Gateway Y (NASDAQ)	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
12.23	MAINE MUNI BOND BANK <i>Rate/Coupon: 3.00%</i> <i>Matures: 11/01/2024</i>	Government Securities Municipal Security	Spouse	None (or less than \$1,001)	Interest, Capital Gains	\$201 - \$1,000
12.24	MAINE MUNI BOND BANK <i>Rate/Coupon: 3.00%</i> <i>Matures: 09/01/2026</i>	Government Securities Municipal Security	Spouse	\$15,001 - \$50,000	Interest	\$201 - \$1,000
12.25	MAINE ST TPK AUTH SP BOND <i>Rate/Coupon: 3.00%</i> <i>Matures: 07/01/2026</i>	Government Securities Municipal Security	Spouse	\$15,001 - \$50,000	Interest	\$201 - \$1,000

	Asset	Asset Type	Owner	Value	Income Type	Income
12.26	UNH - UnitedHealth Group Incorporated (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
12.27	MUNI BOND ELLSWORTH ME GO <i>Rate/Coupon: 2.25%</i> <i>Matures: 12/01/2024</i>	Government Securities Municipal Security	Spouse	None (or less than \$1,001)	Interest, Capital Gains	\$1,001 - \$2,500
12.28	MAINE HEALTH & HIGHER ED REV BOND FINL AUTH <i>Rate/Coupon: 3.25%</i> <i>Matures: 07/01/2027</i>	Government Securities Municipal Security	Spouse	\$15,001 - \$50,000	Interest	\$201 - \$1,000
12.29	MAINE HEALTH & HIGHER ED REV BOND PRIV ED <i>Rate/Coupon: 3.25%</i> <i>Matures: 07/01/2027</i>	Government Securities Municipal Security	Spouse	\$15,001 - \$50,000	Interest	\$201 - \$1,000
12.30	REGIONAL SCHOOL UNIT NO 5 ME <i>Rate/Coupon: 2.50%</i> <i>Matures: 11/01/2026</i>	Government Securities Municipal Security	Spouse	\$15,001 - \$50,000	Interest	\$201 - \$1,000
12.31	MAINE STATE HSG AUTH <i>Rate/Coupon: 2.25%</i> <i>Matures: 11/15/2024</i>	Government Securities Municipal Security	Spouse	None (or less than \$1,001)	Interest	\$201 - \$1,000
12.32	MAINE STATE HSG AUTH <i>Rate/Coupon: 2.45%</i> <i>Matures: 11/15/2025</i>	Government Securities Municipal Security	Spouse	\$15,001 - \$50,000	Interest	\$201 - \$1,000
12.33	MUNI BOND AUGUSTA ME GO <i>Rate/Coupon: 2.25%</i> <i>Matures: 10/01/2026</i>	Government Securities Municipal Security	Spouse	\$1,001 - \$15,000	Interest	\$201 - \$1,000
12.34	MUNI BOND BIDDEFORD ME <i>Rate/Coupon: 3.00%</i> <i>Matures: 10/01/2028</i>	Government Securities Municipal Security	Spouse	\$15,001 - \$50,000	Interest	\$201 - \$1,000

	Asset	Asset Type	Owner	Value	Income Type	Income
12.35	MAINE SCHOOL ADMIN GO BOND <i>Rate/Coupon: 3.00%</i> <i>Matures: 11/01/2028</i>	Government Securities Municipal Security	Spouse	\$15,001 - \$50,000	Interest	\$201 - \$1,000
12.36	CHARLES SCHWAB (PORTLAND, ME) <i>Type: Brokerage Sweep Account</i>	Bank Deposit	Spouse	\$1,001 - \$15,000	Interest	None (or less than \$201)
12.37	AMZN - Amazon.com, Inc.	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	None	None (or less than \$201)
12.38	CMCSA - Comcast Corporation	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
12.39	VIMAX - Vanguard Mid-Cap Index Fund Admiral Shares	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	\$201 - \$1,000
12.40	TMO - Thermo Fisher Scientific Inc Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends	None (or less than \$201)
12.41	FLOT - iShares Floating Rate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	\$201 - \$1,000
12.42	ICVT - iShares Convertible Bond ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
12.43	GIOIX - Guggenheim Macro Opportunities Fund- Institution	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	\$1,001 - \$2,500
12.44	JHEQX - Jpmorgan Hedged Equity Fund I Class	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	\$201 - \$1,000
12.45	EA - Electronic Arts Inc. - Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
12.46	SNVXX-SCHWAB GOV'T MONEY FUND-INVESTOR SHARES (SAN FRANCISCO, CA) Type: Money Market Account	Bank Deposit	Spouse	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500
12.47	MAINE ST TPK AUTH RE REV BOND Rate/Coupon: 4.0% Matures: 07/01/2031	Government Securities Municipal Security	Spouse	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
12.48	91282CFM8 US TREASURY NOTE 4.125% 09/30/2027 Rate/Coupon: None Matures: None	Government Securities US Treasury/Agency Security	Spouse	\$1,001 - \$15,000	Interest	\$201 - \$1,000
12.49	91282CGR6 US TREASURY NOTE 4.625% 03/15/2026 Rate/Coupon: None Matures: None	Government Securities US Treasury/Agency Security	Spouse	\$1,001 - \$15,000	Interest	\$201 - \$1,000
12.50	RGHYX - RBC Bluebay High Yield Bond Fund Class I	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	\$201 - \$1,000
12.51	VZ - Verizon Communications Inc	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
12.52	91282CHX2 US TREASURY NOTE 4.375% 8/31/2028 Rate/Coupon: None Matures: None	Government Securities US Treasury/Agency Security	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
12.53	91282CFY2 US TREASURY NOTE 3.875% 11/30/2029 Rate/Coupon: None Matures: None	Government Securities US Treasury/Agency Security	Spouse	\$15,001 - \$50,000	Interest	\$201 - \$1,000

	Asset	Asset Type	Owner	Value	Income Type	Income
12.54	91282CJF9 US TREASURY NOTE 4.875% 10/31/2028 <i>Rate/Coupon: None</i> <i>Matures: None</i>	Government Securities US Treasury/Agency Security	Spouse	\$15,001 - \$50,000	None	None (or less than \$201)
12.55	91282CJW2 US TREASURY NOTE 4.00% 01/31/2029 <i>Rate/Coupon: None</i> <i>Matures: None</i>	Government Securities US Treasury/Agency Security	Spouse	\$15,001 - \$50,000	None	None (or less than \$201)
13	SCHWAB IRA ROLLOVER - MJH	Retirement Plans IRA	Spouse	--		
13.1	GVI - iShares Intm Government/Credit Bond	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.2	IGSB - iShares Short-Term Corporate Bond ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.3	IJR - iShares Core S&P Small-Cap	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.4	AGG - iShares Core US Aggregate Bond	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.5	SCHM - Schwab US Mid- Cap ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.6	SPY - SPDR S&P 500 ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	None	None (or less than \$201)
13.7	CHARLES SCHWAB (PORTLAND, ME) <i>Type: Brokerage Sweep Account</i>	Bank Deposit	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.8	SCHP - Schwab U.S. TIPS ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
13.9	VIG - Vanguard Dividend Appreciation Index Fund ETF Shar	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.10	IGIB - iShares 5-10 Year Investment Grade Corporate Bond	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.11	GIOIX - Guggenheim Macro Opportunities Fund- Institution	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.12	VWILX - Vanguard International Growth Fund Admiral Share	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.13	RGHYX - RBC Bluebay High Yield Bond Fund Class I	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.14	VWO - Vanguard FTSE Emerging Markets ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
13.15	GNMA - iShares GNMA Bond ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
14	A WOMAN, A PART LLC <i>Company:</i> A WOMAN, A PART LLC (ULSTER PARK, NY) <i>Description:</i> FILM PRODUCTION COMPANY <i>Filer comment:</i> .20 NON-VOTING CLASS B MEMBERSHIP SHARE	Business Entity Limited Liability Company (LLC)	Spouse	\$1,001 - \$15,000	Other (K-1 BOX 7 ROYALTY INCOME)	Other \$47.00
15	MAINE PUBLIC EMPLOYEES RETIREMENT SYSTEM	Retirement Plans Defined Benefit Pension Plan	Spouse	Unascertainable	None	None (or less than \$201)
16	LOOP ROAD LLC <i>Company:</i> LOOP ROAD LLC (GEORGETOWN, MAINE) <i>Description:</i> FAMILY REAL ESTATE LLC	Business Entity Limited Liability Company (LLC)	Joint	--		

	Asset	Asset Type	Owner	Value	Income Type	Income
16.1	LOOP RD COTTAGE <i>Description:</i> SEASONAL RENTAL COTTAGE (GEORGETOWN, MAINE)	Real Estate Residential	Joint	\$500,001 - \$1,000,000	None	None (or less than \$201)

Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

#	Transaction Date	Owner	Ticker	Asset Name	Type	Amount	Comment
1	03/07/2024	Spouse	VZ	Verizon Communications Inc	Purchase	\$1,001 - \$15,000	--

Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **Yes**

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
1	Self	--	SNVXX - SCHWAB GOVERNMENT MONEY FUND	Sale (Partial)	01/05/2024	\$15,001 - \$50,000	n/a
2	Self	<u>VMLUX</u>	Vanguard Limited-Term Tax-Exempt Fd Admiral Shs	Sale (Partial)	03/04/2024	\$100,001 - \$250,000	n/a
3	Self	<u>HACAX</u>	Harbor Capital Appreciation Fund Insti Cl	Sale (Partial)	03/01/2024	\$15,001 - \$50,000	n/a
4	Self	<u>JENIX</u>	Jensen Quality Growth Fund Cl I	Sale (Full)	03/01/2024	\$100,001 - \$250,000	n/a
5	Self	--	SNVXX - SCHWAB GOVERNMENT MONEY FUND	Sale (Partial)	04/30/2025	\$1,001 - \$15,000	n/a
6	Self	--	SNVXX - SCHWAB GOVERNMENT MONEY FUND	Sale (Partial)	04/08/2024	\$1,001 - \$15,000	n/a
7	Spouse	--	SNVXX - SCHWAB GOVERNMENT MONEY FUND	Sale (Partial)	05/02/2024	\$1,001 - \$15,000	n/a
8	Self	<u>VTEB</u>	Vanguard Tax-Exempt Bond ETF	Sale (Partial)	05/16/2024	\$15,001 - \$50,000	n/a
9	Self	<u>VTEB</u>	Vanguard Tax-Exempt Bond ETF	Sale (Partial)	07/24/2024	\$1,001 - \$15,000	n/a
10	Self	<u>MUB</u>	iShares National Muni Bond ETF	Sale (Partial)	08/01/2024	\$15,001 - \$50,000	n/a
11	Self	<u>VMLUX</u>	Vanguard Limited-Term Tax-Exempt Fd Admiral Shs	Sale (Full)	08/01/2024	\$250,001 - \$500,000	n/a
12	Self	<u>MUB</u>	iShares National Muni Bond ETF	Sale (Partial)	08/06/2024	\$50,001 - \$100,000	n/a
13	Self	<u>VTEAX</u>	Vanguard Tax-Exempt Bond Index Fund Admiral	Sale (Full)	08/06/2024	\$100,001 - \$250,000	n/a
14	Self	<u>MUB</u>	iShares National Muni Bond ETF	Sale (Partial)	08/09/2024	\$1,001 - \$15,000	n/a
15	Spouse	<u>GNMA</u>	iShares GNMA Bond ETF	Purchase	08/15/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
16	Self	<u>VTEB</u>	Vanguard Tax-Exempt Bond ETF	Sale (Partial)	08/21/2024	\$1,001 - \$15,000	n/a
17	Self	<u>VTEB</u>	Vanguard Tax-Exempt Bond ETF	Sale (Partial)	08/23/2024	\$1,001 - \$15,000	n/a
18	Self	<u>MUB</u>	iShares National Muni Bond ETF	Sale (Partial)	09/06/2024	\$15,001 - \$50,000	n/a
19	Spouse	<u>IGSB</u>	iShares 1-5 Year Investment Grade Corporate Bond E	Sale (Partial)	09/11/2024	\$1,001 - \$15,000	n/a
20	Self	<u>SCHH</u>	Schwab U.S. REIT ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
21	Self	<u>QCLN</u>	First Trust NASDAQ Clean Edge Green Energy Index F	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
22	Self	<u>LMBS</u>	First Trust Low Duration Opportunities ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
23	Self	<u>BUFR</u>	FT Vest Laddered Buffer ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
24	Self	<u>GIOIX</u>	Guggenheim Macro Opportunities Fund-Institution	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
25	Self	<u>RSP</u>	Invesco S&P 500 Equal Weight ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
26	Self	<u>IBB</u>	iShares Biotechnology ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
27	Self	<u>IJH</u>	iShares Core S&P Mid-Cap ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
28	Self	<u>IVV</u>	iShares Core S&P 500 ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
29	Self	<u>AGG</u>	iShares Core U.S. Aggregate Bond ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
30	Self	<u>HEFA</u>	iShares Currency Hedged MSCI EAFE ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
31	Self	<u>GNMA</u>	iShares GNMA Bond ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
32	Self	<u>IAU</u>	ishares Gold Trust	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
33	Self	<u>GVI</u>	iShares Intermediate Government/Credit Bond ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
34	Self	<u>IGSB</u>	iShares 1-5 Year Investment Grade Corporate Bond E	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
35	Self	<u>IGIB</u>	iShares 5-10 Year Investment Grade Corporate Bond	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
36	Self	<u>JSOSX</u>	Jpmorgan Strategic Income Opportunities Fund I C	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
37	Self	<u>RGHYX</u>	RBC Bluebay High Yield Bond Fund Class I	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
38	Self	--	SNVXX SCHWAB GOVERNMENT MONEY FUND	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
39	Self	<u>SCHG</u>	Schwab U.S. Large-Cap Growth ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
40	Self	<u>SCHV</u>	Schwab U.S. Large-Cap Value ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
41	Self	<u>VOX</u>	Vanguard Communication Services ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
42	Self	<u>VIG</u>	Vanguard Div Appreciation ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
43	Self	<u>VFH</u>	Vanguard Financials ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
44	Self	<u>VHT</u>	Vanguard Health Care ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
45	Self	<u>VYM</u>	Vanguard High Dividend Yield ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a
46	Self	<u>VPU</u>	Vanguard Utilities ETF	Purchase	09/26/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
47	Self	<u>IGIFX</u>	International Growth and Income Fd Cl F-1 Shs	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
48	Self	<u>SGENX</u>	First Eagle Global Fund Class A	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
49	Self	<u>ICVT</u>	iShares Convertible Bond ETF	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
50	Self	<u>IEFA</u>	iShares Core MSCI EAFE ETF	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
51	Self	<u>IJR</u>	iShares Core S&P Small-Cap ETF	Sale (Partial)	09/26/2024	\$15,001 - \$50,000	n/a
52	Self	<u>FLOT</u>	iShares Floating Rate Bond ETF	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
53	Self	<u>EMB</u>	iShares J.P. Morgan USD Emerging Markets Bond ETF	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
54	Self	<u>IJK</u>	iShares S&P Mid-Cap 400 Growth ETF	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
55	Self	<u>IJJ</u>	iShares S&P Mid-Cap 400 Value ETF	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
56	Self	<u>IVW</u>	iShares S&P 500 Growth ETF	Sale (Full)	09/26/2024	\$15,001 - \$50,000	n/a
57	Self	<u>IVE</u>	S&P 500 Value Ishares ETF	Sale (Full)	09/26/2024	\$15,001 - \$50,000	n/a
58	Self	<u>JHEQX</u>	Jpmorgan Hedged Equity Fund I Class	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
59	Self	<u>JAMCX</u>	JP Morgan Mid Cap Value Fund-A Share Class	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
60	Self	<u>VCIT</u>	Vanguard Intermediate-Term Corporate Bond ETF	Sale (Full)	09/26/2024	\$1,001 - \$15,000	n/a
61	Self	<u>VTEB</u>	Vanguard Tax-Exempt Bond ETF	Sale (Partial)	10/21/2024	\$1,001 - \$15,000	n/a
62	Self	--	SNVXX SCHWAB GOVERNMENT MONEY FUND	Sale (Partial)	11/04/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
63	Spouse	<u>RGHYX</u>	RBC Bluebay High Yield Bond Fund Class I	Purchase	11/08/2024	\$1,001 - \$15,000	n/a
64	Spouse	--	91282CHX2 US TREASURY NOTE 4.375% 8/31/2028	Purchase	11/08/2024	\$1,001 - \$15,000	n/a
65	Self	<u>VTEB</u>	Vanguard Tax-Exempt Bond ETF	Sale (Partial)	11/15/2024	\$15,001 - \$50,000	n/a
66	Spouse	--	91282CFY2 US TREASURY NOTE 3.875% 11/30/2029	Purchase	11/18/2024	\$15,001 - \$50,000	n/a
67	Self	<u>MUB</u>	iShares National Muni Bond ETF	Sale (Partial)	12/02/2024	\$15,001 - \$50,000	n/a
68	Spouse	--	91282CJF9 US TREASURY NOTE 4.875% 10/31/2028	Purchase	12/17/2024	\$15,001 - \$50,000	n/a
69	Spouse	--	91282CJW2 US TREASURY NOTE 4.00% 01/31/2029	Purchase	12/17/2024	\$15,001 - \$50,000	n/a

Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **No**

Part 6. Travel

Did you, your spouse, or dependent child receive any **reportable travel**? **No**

Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2011	Joint	Mortgage	0	3.50% (15 YRS)	\$15,001 - \$50,000	TD BANK, NA LEWISTON, ME	COMBINED MORTGAGE ON RENTAL & PERSONAL RESIDENCE

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **Yes**

#	Position Dates	Position Held	Entity	Entity Type	Comments
1	Mar 2009 to present	Trustee	TRUST U/W/O ROGER KLINE FBO MATTHEW KLINE NEW YORK, NY	Other (TESTAMENTARY TRUST)	APPOINTMENT AS TRUSTEE UNDER THE LAST WILL & TESTAMENT OF ROGER C KLINE FOR THE BENEFIT OF MATTHEW KLINE IN SURROGATE'S COURT, NEW YORK COUNTY.
2	Nov 2012 to present	Trustee	TRUST UNDER CLAUSE SEVENTH OF WILL OF ROGER C KLINE FOR DARTMOUTH COLLEGE NEW YORK, NY	Other (TESTAMENTARY TRUST)	APPOINTMENT AS TRUSTEE UNDER THE LAST WILL AND TESTAMENT OF ROGER C KLINE FOR THE BENEFIT OF DARTMOUTH COLLEGE IN SURROGATE'S COURT, NEW YORK COUNTY
3	Nov 2012 to present	Trustee	TRUST UNDER CLAUSE NINTH OF WILL OF ROGER C KLINE - GENERATION SKIPPING TRUST NEW YORK, NY	Other (TESTAMENTARY TRUST)	APPOINTMENT AS TRUSTEE UNDER THE LAST WILL AND TESTAMENT OF ROGER C KLINE - GENERATION SKIPPING TRUST IN SURROGATE'S COURT, NEW YORK COUNTY.
4	Jan 2021 to present	Other (MEMBER)	LOOP ROAD LLC GEORGETOWN, MAINE	Company	n/a

Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**

#	Date	Parties Involved	Type	Status and Terms	Comments
1	Mar 2009	TRUST UNDER THE WILL OF ROGER C KLINE FOR BENEFIT OF MATTHEW KLINE NEW YORK, NY	Compensation Agreement	APPOINTMENT AS TRUSTEE U/W/O ROGER C KLINE FBO MATTHEW KLINE IN SURROGATE'S COURT, NEW YORK COUNTY. ENTITLED TO TRUSTEE COMMISSIONS FOR SERVICES RENDERED DURING 2024 PURSUANT TO NEW YORK STATUTE. AMOUNT OF \$9261 REMAINS UNPAID AS OF DECEMBER 31, 2024. BALANCE OF COMMISSIONS WAIVED IN THE AMOUNT OF \$13,826.	n/a
2	Nov 2012	TRUST UNDER CLAUSE NINTH OF WILL OF ROGER C KLINE- GENERATION SKIPPING TRUST NEW YORK, NY	Compensation Agreement	APPOINTMENT AS TRUSTEE U/W/O ROGER C KLINE - GENERATION SKIPPING TRUST IN SURROGATE'S COURT, NEW YORK COUNTY. ENTITLED TO TRUSTEE COMMISSIONS FOR SERVICES RENDERED DURING 2024 PURSUANT TO NEW YORK STATUTE. AMOUNT OF \$24,024 REMAINS UNPAID AS OF DECEMBER 31, 2024.	n/a
3	Nov 2012	TRUST UNDER CLAUSE SEVENTH OF WILL OF ROGER C KLINE FOR DARTMOUTH COLLEGE NEW YORK, NY	Compensation Agreement	APPOINTMENT AS TRUSTEE U/W/O ROGER C KLINE FBO DARTMOUTH COLLEGE IN SURROGATE'S COURT, NEW YORK COUNTY. ENTITLED TO TRUSTEE COMMISSIONS FOR SERVICES RENDERED DURING 2024 PURSUANT TO NEW YORK STATUTE. COMMISSIONS WERE WAIVED IN THE AMOUNT OF \$18,404.	n/a
4	Jan 1995	MAINE STATE RETIREMENT SYSTEM AUGUSTA, ME	Continuing participation in an employee benefit plan	CONTINUING MONTHLY PENSION BENEFITS AS A RESULT OF STATE GOVERNMENT SERVICE AS ELECTED GOVERNOR FROM 1995-2003.	n/a

#	Date	Parties Involved	Type	Status and Terms	Comments
5	Jan 2018	ISLANDPORT PRESS INC YARMOUTH, ME	Royalty Agreement	PUBLISHING AGREEMENT TO WRITE A BOOK FEATURING IMAGES AND EXTENDED CAPTIONS RELATED TO PERSONAL LIFE AND WORK AS A US SENATOR WITH INTENT TO PUBLISH AND DISTRIBUTE FOR PUBLIC RESALE. ALL CONTRACT ROYALTIES ARE ASSIGNED TO THE STATEWIDE PUBLIC CHARITY: GOOD SHEPHERD FOOD BANK OF AUBURN MAINE. PUBLISHING AGREEMENT PREVIOUSLY INCLUDED WITH 2018 CALENDAR YEAR REPORT.	n/a

Part 10. Compensation

Only required if you are a candidate or this is your first report: Did any person or entity pay more than \$5,000 to you or for services provided by you? **This is not my first report.**

Attachments & Comments

No attachments added.

No comments added.