

Statement of Financial Interests for 2022



CONTACT INFORMATION

Last Name:

First Name and Middle initial:

Hatch

Susannah

Work Phone Number:

Other Phone:

(857) 278-2226

Work Email:

Other Email:

susannah.hatch@mass.gov

Redacted

Primary Residence Address:

Redacted

Contact mailing address

Redacted

You indicated that you had no spouse living in your household at any time during 2022.

You indicated that you had no dependent child(ren) residing in your household at any time during 2022.

Candidacy and Public Service

1. If you are a candidate for public office, please indicate the public office you are seeking.

Filer reported none.

2. Identify the position you now hold, or have held, which requires you to file a Statement of Financial Interests and provide the required information for that position. If you held more than one public position which requires you to file, identify each position.

| Agency Name | Address | Position | Date | Amount of Income |
|---|--|----------------|------------|-------------------|
| Department of Energy Resources (DOER) | 100 CAMBRIDGE STREET, BOSTON, MA, 02114, US | Chief of Staff | 08/27/2023 | \$100,001 or more |

3. Other than the position(s) identified in Question 2, identify every public position you held, and every public agency to which you provided services, at any time during 2022, whether compensated or not, and whether full- or part-time.

Filer reported none.

4. Identify every public position your spouse and/or any dependent child(ren) residing in your household held, and every public agency to which your spouse and/or any dependent child(ren) residing in your household provided services, at any time during 2022, whether compensated or not, and whether full- or part-time.

Filer reported none.

Private Employment and Leaves of Absence

5. Identify every Business for which you worked as an employee, manager, consultant, or independent contractor at any time during 2022, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Filer reported none.

6. Identify any Business from which you were on a leave of absence at any time during 2022, and provide its address.

Filer reported none.

7. Identify every Business for which your spouse and/or any dependent child(ren) residing in your household worked as an employee, manager, consultant, or independent contractor at any time during 2022, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Filer reported none.

Business Ownership and Transfers

8. Identify each Business of which you were, in whole or in part, an owner, partner, or proprietor, or in which you owned more than 1% of any class of the outstanding stock or similar ownership interest, at any time during 2022, and provide the required information for each.

Filer reported none.

9. Identify each Business of which your spouse and/or any dependent child(ren) residing in your household was, in whole or in part, an owner, partner, or proprietor, or in which your spouse and/or any dependent child(ren) residing in your household owned more than 1% of any class of the outstanding stock or similar ownership interest, at any time during 2022, and provide the required information for each.

Filer reported none.

10. Identify any stock or similar ownership interest in a Business which you transferred to your spouse and/or any dependent child(ren) residing in your household during 2022, and provide the required information for each.

Filer reported none.

Service as an Officer, Director, or Trustee

11. Identify any Business in which you served as an officer, director, or trustee, at any time during 2022, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Filer reported none.

12. Identify any Business in which your spouse and/or any dependent child(ren) residing in your household served as an officer, director, or trustee, at any time during 2022, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Filer reported none.

NOTE: If the Filer answered “YES” to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member’s name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member’s address, the Filer was not required to provide that address.

Real Estate

13. Identify all Real Estate in Massachusetts which you owned directly or through a Business as of December 31, 2022, and which had an assessed value greater than \$1,000, and provide the required information for each Real Estate holding.

Ownership Legend:
Filer = F
Spouse/Child(ren) = S/C
Trust = T

| Property Address | Owner | Transferred? | Transferor Name | Transferor Address | Assessed Value |
|------------------|-------|--------------|-----------------|--------------------|-------------------|
| Redacted | F | No | | | \$100,001 or more |

14. Other than the Real Estate identified in Question 13, identify all Real Estate in Massachusetts which your spouse and/or any dependent child(ren) residing in your household owned directly or through a Business as of December 31, 2022, and which had an assessed value greater than \$1,000, and provide the required information for each Real Estate holding.

Filer reported none.

15. Identify any Trust of which you were a beneficiary, and which owned Real Estate in Massachusetts as of December 31, 2022, with an assessed value greater than \$1,000, and provide the required information for each such Trust and Real Estate holding.

Beneficiary Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

16. Other than the Real Estate identified in Question 15, identify any Trust of which your spouse and/or any dependent child(ren) residing in your household was a beneficiary, and which owned Real Estate in Massachusetts as of December 31, 2022, with an assessed value greater than \$1,000, and provide the required information for each such Trust and Real Estate holding.

Filer reported none.

17. Identify any Real Estate in Massachusetts with an assessed value greater than \$1,000, that was transferred to another person or entity by you, or by a Trust of which you were a beneficiary, at any time during 2022, and provide the required information for each Real Estate holding.

Ownership Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

18. Other than the Real Estate identified in Question 17, identify any Real Estate in Massachusetts with an assessed value greater than \$1,000, that was transferred to another person or entity by your spouse and/or any dependent child(ren) residing in your household, or by a Trust of which your spouse and/or any dependent child(ren) residing in your household was a beneficiary, at any time during 2022, and provide the required information for each piece of Real Estate transferred.

Ownership Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

19. Identify any Real Estate in Massachusetts with an assessed value greater than \$1,000, on which, as of December 31, 2022, you, or a Trust of which you were a beneficiary, had a lien, attachment, or mortgage receivable, and provide the required information for each.

Ownership Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

20. Other than the Real Estate identified in Question 19, identify any Real Estate in Massachusetts with an assessed value greater than \$1,000, on which, as of December 31, 2022, your spouse and/or any dependent child(ren) residing in your household, or a Trust of which your spouse and/or any dependent child(ren) residing in your household, had a lien, attachment, or mortgage receivable, and provide the required information for each.

Ownership Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

NOTE: If the Filer answered “YES” to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member’s name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member’s address, the Filer was not required to provide that address.

Financial Investments

21. Identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which you owned directly or through a Business, as of December 31, 2022, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Ownership Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

22. Other than the bonds or other securities identified in Question 21, identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which your spouse and/or any dependent child(ren) residing in your household owned directly or through a Business, as of December 31, 2022, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Filer reported none.

23. Identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which was owned as of December 31, 2022, by a Trust of which you were a beneficiary, whether directly or through a Business, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Beneficiary Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

24. Identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which was owned as of December 31, 2022, by a Trust of which your spouse and/or any dependent child(ren) residing in your household was a beneficiary, whether directly or through a Business, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Filer reported none.



25. Identify every Financial Investment that you owned directly or through a Business as of December 31, 2022, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each.

Ownership Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

| Name of Issuer | Owner | Description of Investment | Principal Place of Business or State of Incorporation | Address |
|--|-------|---------------------------|---|---------|
| Vanguard S&P 500 ETF (VOO) | F | | | |
| RBC Emerging Markets Equity Fund Cl I (REEIX) | F | | | |
| WCM Focused International Growth Fund Insti Cl (WCMIX) | F | | | |
| Vanguard Short-Term Tax-Exempt Fd Admiral (VWSUX) | F | | | |
| Walden SMID Cap Innovations Fund (WASMX) | F | | | |
| Schwab Government Money Fund-Purchased Shares (SNVXX) | F | | | |

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|---|---|
| Microsoft Corporation - Common Stock (MSFT) | F |
| Mastercard Incorporated Common Stock (MA) | F |
| Alphabet Inc. - Class C Capital Stock (GOOG) | F |
| Merck & Company, Inc. Common Stock (new) (MRK) | F |
| NVIDIA Corporation - Common Stock (NVDA) | F |
| Martin Marietta Materials, Inc. Common Stock (MLM) | F |
| UnitedHealth Group Incorporated Common Stock (DE) (UNH) | F |
| Seattle Genetics, Inc. - Common Stock (SGEN) | F |

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|---|---|
| Comcast Corporation - Class A Common Stock (CMCSA) | F |
| Brown Forman Inc Class A Common Stock (BF.A) | F |
| Lam Research Corporation - Common Stock (LRCX) | F |
| Royal Caribbean Cruises Ltd. Common Stock (RCL) | F |
| Williams-Sonoma, Inc. Common Stock (DE) (WSM) | F |
| Qorvo, Inc. - Common Stock (QRVO) | F |
| Accenture plc. Class A Ordinary Shares (Ireland) (ACN) | F |
| Johnson & Johnson Common Stock (JNJ) | F |

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|---|---|
| Xylem Inc. Common Stock New (XYL) | F |
| Adobe Systems Incorporated - Common Stock (ADBE) | F |
| Trimble Navigation Limited - Common Stock (TRMB) | F |
| Home Depot, Inc. (The) Common Stock (HD) | F |
| Quanta Services, Inc. Common Stock (PWR) | F |
| Raymond James Financial, Inc. Common Stock (RJF) | F |
| Amazon.com, Inc. - Common Stock (AMZN) | F |
| Golar LNG Limited - Common Shares (GLNG) | F |

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|---|---|
| Novo Nordisk A/S Common Stock (NVO) | F |
| Cognex Corporation - Common Stock (CGNX) | F |
| Cummins Inc. Common Stock (CMI) | F |
| Bank of America Corporation Common Stock (BAC) | F |
| FormFactor, Inc. - Common Stock (FORM) | F |
| Reliance Steel & Aluminum Co. Common Stock (DE) (RS) | F |
| Linde PLC | F |
| Iridium Communications Inc - Common Stock (IRDM) | F |

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| AAR Corp. Common Stock (AIR) | F |
| Blackrock Muni Intermediate Duration Fund Inc Common Stock (MUI) | F |
| Robert Half International Inc. Common Stock (RHI) | F |
| Everest Re Group, Ltd. Common Stock (RE) | F |
| Masonite International Corporation Ordinary Shares (Canada) (DOOR) | F |
| Verizon Communications Inc. Common Stock (VZ) | F |
| Webster Financial Corporation Common Stock (WBS) | F |
| AbbVie Inc. Common Stock (ABBV) | F |

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| Hexcel Corporation Common Stock (HXL) | F |
| Cisco Systems, Inc. - Common Stock (CSCO) | F |
| Nuveen Dividend Advantage Municipal Fund 3 Common Shares of Beneficial Interest (NZF) | F |
| Alphabet Inc. - Class A Common Stock (GOOGL) | F |
| Logitech International S.A. - Registered Shares (LOGI) | F |
| TJX Companies, Inc. (The) Common Stock (TJX) | F |
| PulteGroup, Inc. Common Stock (PHM) | F |
| Tesla Motors, Inc. - Common Stock (TSLA) | F |

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| General American Investors, Inc. Common Stock (GAM) | F |
| Eaton Corporation, PLC Ordinary Shares (ETN) | F |
| AvalonBay Communities, Inc. Common Stock (AVB) | F |
| Regeneron Pharmaceuticals, Inc. - Common Stock (REGN) | F |
| Taylor Morrison Home Corporation Class A Common Stock (TMHC) | F |
| Orion Engineered Carbons S.A Common Shares (OEC) | F |
| Lumentum Holdings Inc. - Common Stock (LITE) | F |
| Adams Diversified Equity Fund Inc. (ADX) | F |

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| Astrazeneca PLC Common Stock (AZN) | F |
| First Citizens BancShares, Inc. - Class A Common Stock (FCNCA) | F |
| Sanofi American Depositary Shares (Each repstg one-half of one ordinary share) (SNY) | F |
| Novartis AG Common Stock (NVS) | F |
| CubeSmart Common Shares (CUBE) | F |
| ASML Holding N.V. - ADS represents 1 ordinary share (ASML) | F |
| Synovus Financial Corp. Common Stock (SNV) | F |
| Palo Alto Networks, Inc. Common Stock (PANW) | F |

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| Essent Group Ltd. Common Shares (ESNT) | F |
| AllianceBernstein National Municipal Income Fund Inc (AFB) | F |
| AECOM Common Stock (ACM) | F |
| SAP SE ADS (SAP) | F |
| Aberdeen Asia-Pacific Income Fund Inc Common Stock (FAX) | F |
| Visa Inc. (V) | F |
| American Tower Corporation (REIT) Common Stock (AMT) | F |
| Target Corporation Common Stock (TGT) | F |

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| Vishay Intertechnology, Inc. Common Stock (VSH) | F |
| Texas Capital Bancshares, Inc. - Common Stock (TCBI) | F |
| Cytokinetics, Incorporated - Common Stock (CYTK) | F |
| Costco Wholesale Corporation - Common Stock (COST) | F |
| Blackrock MuniYield Quality Fund III, Inc Common Stock (MYI) | F |
| CommVault Systems, Inc. - Common Stock (CVLT) | F |
| The Travelers Companies, Inc. Common Stock (TRV) | F |
| Brookfield Real Assets Securities Fund - Class I (RASIX) | F |

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| Sumitomo Mitsui Financial Group Inc Unsponsored American Depositary Shares (Japan) (SMFG) | F |
| Columbia Banking System, Inc. - Common Stock (COLB) | F |
| United Rentals, Inc. Common Stock (URI) | F |
| Morgan Stanley Emerging Markets Domestic Debt Fund, Inc. Morgan Stanley Emerging Markets Domestic Debt Fund, Inc. Common Stock (EDD) | F |
| National Grid Transco, PLC National Grid PLC (NEW) American Depositary Shares (NGG) | F |
| Deere & Company Common Stock (DE) | F |
| Deutsche Municiple Income Trust Common Shares (KTF) | F |
| Lincoln National Corporation Common Stock (LNC) | F |

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| Nuveen Credit Strategies Income Fund Shares of Beneficial Interest(JQC) | F |
| Acadia Healthcare Company, Inc. - Common Stock (ACHC) | F |
| ACI Worldwide, Inc. - Common Stock (ACIW) | F |
| Automatic Data Processing, Inc. - Common Stock (ADP) | F |
| American Financial Group, Inc. Common Stock (AFG) | F |
| AFLAC Incorporated Common Stock (AFL) | F |
| Apollo Senior Floating Rate Fund Inc. Common Stock (AFT) | F |
| Alpine Global Dynamic Dividend Fund Shares of Beneficial Interest (AGD) | F |

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| Apollo Tactical Income Fund Inc. Common Stock (AIF) | F |
| Applied Materials, Inc. - Common Stock (AMAT) | F |
| Ambarella, Inc. - Ordinary Shares (AMBA) | F |
| Arrow Electronics, Inc. Common Stock (ARW) | F |
| Associated Banc-Corp Common Stock (ASB) | F |
| Avnet, Inc. Common Stock (AVT) | F |
| American Water Works Company, Inc. Common Stock (AWK) | F |
| American Express Company Common Stock (AXP) | F |

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| Brunswick Corporation Common Stock (BC) | F |
| Barclays PLC Common Stock (BCS) | F |
| Belden Inc Common Stock (BDC) | F |
| Alpine Total Dynamic Dividend Fund Common Stock (AOD) | F |
| Becton, Dickinson and Company Common Stock (BDX) | F |
| Berry Plastics Group, Inc. Common Stock (BERY) | F |
| BlackRock Municipal Income Trust (BFK) | F |
| Blackstone / GSO Strategic Credit Fund Common Shares (BGB) | F |

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| Booking Holdings, Inc. | F |
| BankUnited, Inc. Common Stock (BKU) | F |
| BlackRock Municipal Income Trust II (BLE) | F |
| Bristol-Myers Squibb Company Common Stock (BMJ) | F |
| Broadridge Financial Solutions, Inc. Common Stock (BR) | F |
| Legg Mason BW Global Income Opportunities Fund Inc. Common Stock (BWG) | F |
| Citigroup, Inc. Common Stock (C) | F |
| Comerica Incorporated Common Stock (CMA) | F |

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| CNH Industrial N.V. Common Shares (CNHI) | F |
| Camden Property Trust Common Stock (CPT) | F |
| Salesforce.com Inc Common Stock (CRM) | F |
| Crocs, Inc. - Common Stock (CROX) | F |
| Carpenter Technology Corporation Common Stock (CRS) | F |
| Criteo S.A. - American Depository Shares (CRO) | F |
| CVS Health Corporation Common Stock (CVS) | F |
| Dana Holding Corporation Common Stock When-Issued (DAN) | F |

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| Dreyfus High Yield Strategies Fund Common Stock (DHF) | F |
| Walt Disney Company (The) Common Stock (DIS) | F |
| Amdocs Limited - Ordinary Shares (DOX) | F |
| Dreyfus Strategic Municipal Bond Fund, Inc. Common Stock (DSM) | F |
| Dycom Industries, Inc. Common Stock (DY) | F |
| Western Asset Emerging Markets Income Fund, Inc. Common Stock (EMD) | F |
| Equity Residential Common Shares of Beneficial Interest (EQR) | F |
| First BanCorp. New Common Stock (FBP) | F |

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| Fresenius Medical Care AG Common Stock (FMS) | F |
| First Solar, Inc. - Common Stock (FSLR) | F |
| Franklin Limited Duration Income Trust Common Shares of Beneficial Interest (FTF) | F |
| Genpact Limited Common Stock (G) | F |
| Prudential Global Short Duration High Yield Fund, Inc. Common Stock (GHY) | F |
| Gap, Inc. (The) Common Stock (GPS) | F |
| Western Asset High Income Opportunity Fund, Inc. Common Stock (HIO) | F |
| Honda Motor Company, Ltd. Common Stock (HMC) | F |

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| HSBC Holdings, plc. Common Stock (HSBC) | F |
| Host Hotels & Resorts, Inc. Common Stock (HST) | F |
| Integra LifeSciences Holdings Corporation - Common Stock (IART) | F |
| International Business Machines Corporation Common Stock (IBM) | F |
| ICON plc - Ordinary Shares (ICLR) | F |
| Intercontinental Hotels Group American Depositary Shares (Each representing one Ordinary Share) (IHG) | F |
| Intel Corporation - Common Stock (INTC) | F |
| Invesco Quality Municipal Income Trust Common Stock (IQI) | F |

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| Prudential Short Duration High Yield Fund, Inc. Common Stock (ISD) | F |
| Orix Corp Ads Common Stock (IX) | F |
| J.B. Hunt Transport Services, Inc. - Common Stock (JBHT) | F |
| Jones Lang LaSalle Incorporated Common Stock (JLL) | F |
| Nuveen Preferred Income Opportunities Fund (JPC) | F |
| Nuveen Real Estate Income Fund Common Shares of Beneficial Interest (JRS) | F |
| KB Home Common Stock (KBH) | F |
| Kulicke and Soffa Industries, Inc. - Common Stock (KLIC) | F |

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| Knight Transportation, Inc. Common Stock (KNX) | F |
| Kayne Anderson MLP Investment Company Common Stock (KYN) | F |
| Lear Corporation Common Stock (LEA) | F |
| Lowe's Companies, Inc. Common Stock (LOW) | F |
| lululemon athletica inc. - Common Stock (LULU) | F |
| Manchester United Ltd. Class A Ordinary Shares (MANU) | F |
| Moelis & Company Class A Common Stock (MC) | F |
| Medtronic plc. Ordinary Shares (MDT) | F |

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| MFS Municipal Income Trust Common Stock (MFM) | F |
| Blackrock MuniHoldings Fund, Inc. Common Stock (MHD) | F |
| Pioneer Municipal High Income Trust Common Shares of Beneficial Interest (MHI) | F |
| The Middleby Corporation - Common Stock (MIDD) | F |
| Molina Healthcare Inc Common Stock (MOH) | F |
| MRC Global Inc. Common Stock (MRC) | F |
| Morgan Stanley Emerging Markets Debt Fund, Inc. Common Stock (MSD) | F |
| The Madison Square Garden Company Class A Common Stock (New) (MSG) | F |

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| Blackrock MuniVest Fund, Inc. Common Stock (MVF) | F |
| MaxLinear, Inc Class A Common Stock (MXL) | F |
| Blackrock MuniYield Fund, Inc. Common Stock (MYD) | F |
| Nuveen Dividend Advantage Municipal Fund Common Stock (NAD) | F |
| AllianzGI Convertible & Income Fund (NCV) | F |
| AllianzGI Convertible & Income Fund II Common Shares of Beneficial Interest (NCZ) | F |
| Nuveen Dividend Advantage Municipal Income Fund Common Shares of Beneficial Interest (NVG) | F |
| ON Semiconductor Corporation - Common Stock (ON) | F |

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| Pioneer High Income Trust Common Shares of Beneficial Interest(PHT) | F |
| ProLogis, Inc. Common Stock(PLD) | F |
| Plug Power, Inc. - Common Stock(PLUG) | F |
| PNC Financial Services Group, Inc. (The) Common Stock(PNC) | F |
| Qiagen N.V. - Common Shares(QGEN) | F |
| Regency Centers Corporation Common Stock(REG) | F |
| Reinsurance Group of America, Incorporated Common Stock(RGA) | F |
| Banco Santander, S.A. Sponsored ADR (Spain)(SAN) | F |

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| Starbucks Corporation - Common Stock (SBUX) | F |
| SeaWorld Entertainment, Inc. Common Stock (SEAS) | F |
| Sealed Air Corporation Common Stock (SEE) | F |
| Stifel Financial Corporation Common Stock (SF) | F |
| Siemens AG (SIEGY) | F |
| Selective Insurance Group, Inc. - Common Stock (SIGI) | F |
| Sony Corporation Common Stock (SNE) | F |
| Sarepta Therapeutics, Inc. - Common Stock (SRPT) | F |

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| Stag Industrial, Inc. Common Stock (STAG) | F |
| STERIS Corporation Common Stock (STE) | F |
| Southwest Gas Corporation Common Stock (SWX) | F |
| Stryker Corporation Common Stock (SYK) | F |
| Sysco Corporation Common Stock (SYI) | F |
| Telefonica SA Common Stock (TEF) | F |
| TEGNA Inc (TGNA) | F |
| Hanover Insurance Group Inc (THG) | F |

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| Toyota Motor Corporation Common Stock(TM) | F |
| T. Rowe Price Group, Inc. - Common Stock(TROW) | F |
| Texas Instruments Incorporated - Common Stock(TXN) | F |
| UBS Group AG Registered Ordinary Shares(UBS) | F |
| United Parcel Service, Inc. Common Stock(UPS) | F |
| Invesco Trust for Investment Grade Municipals Common Stock (DE) (VGM) | F |
| Voya Financial, Inc. Common Stock(VOYA) | F |
| Ventas, Inc. Common Stock(VTR) | F |

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| Warner Brothers Discovery A | F |
| Welltower Inc. Common Stock (HCN) | F |
| Wells Fargo & Company Common Stock (WFC) | F |
| Westlake Chemical Corporation Common Stock (WLK) | F |
| Waste Management, Inc. Common Stock (WM) | F |
| Wintrust Financial Corporation - Common Stock (WTFC) | F |
| Invesco Dynamic Credit Opportunities (XVT AX) | F |
| XPO Logistics, Inc. (XPO) | F |

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|--|---|--------------|----------------|---|
| Diageo plc Common Stock (DEO) | F | | | |
| Koninklijke Ahold N.V. ADR | F | Common Stock | Netherlands | Provincialeweg 11, Zaandam 1506 MA Netherlands |
| Allianz SE | F | Common Stock | Germany | Koeniginstrasse 28, Munich, 80802 Germany |
| Blackrock Capital Allocation Term Trust | F | Mutual Fund | Deleware | 100 Bellevue Parkway, Wilmington, DE, 19809, US |
| Compas Group PLC | F | Common Stock | United Kingdom | Compass House Guildford Street, Chertsey, KT16 9BQ United Kingdom |
| Deutsche Telekom AG | F | Common Stock | Germany | Friedrich-Ebert-A llee 140, Bonn 53113 Germany |
| PIMCO Dynamic Income Fund Common Stock (PDI) | F | | | |
| Veritiv Corporation Common Stock (VRTV) | F | | | |

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| Pioneer Municipal High Income Trust Common Shares of Beneficial Interest (MHI) | F | | | |
| Goldman Sachs Group, Inc. (The) Common Stock (GS) | F | | | |
| Hartford Financial Services Group, Inc. (The) Common Stock (HIG) | F | | | |
| JP Morgan Chase & Co. Common Stock (JPM) | F | | | |
| Western Asset Managed Municipals Fund, Inc. Common Stock (MMU) | F | | | |
| Deutsche Boerse | F | ADR (American Depository Receipt) | Germany | Neue Boersenstrasse 1, Frankfurt am Main 60487, Germany |
| IAC Inc. | F | Common Stock | New York | 555 West 18th St, New York, NY, 10011, US |
| Mitsubishi Chemical Group Corporation | F | ADR (American Depository Receipt) | Japan | Palace Bldg, 1-1-1, Marunouchi, Chiyoda-ku, Tokyo-To 100-8251 JP |

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| AIA Group Limited | F | ADR (American Depository Receipt) | Hong Kong | AIA Wealth Select Centre, 12/F AIA Tower, 183 Electric Road, North Point HK |
| Arcosa, Inc. | F | Common Stock | Texas | 500 N Akard St Suite 400, Dallas, TX, 75201 3332, US |
| Ageas SA | F | ADR (American Depository Receipt) | Belgium | Markiesstraat, Rue du Marquis 1 Box 7, Bruxelles, Bruxelles-Capital e, 1000 BE |
| Avangrid, Inc. | F | Common Stock | Connecticut | 180 Marsh Hill Rd, Orange, CT, 06477, US |
| Air Liquide | F | ADR (American Depository Receipt) | France | 75 Quai d'Orsay, Paris, Ile-de-France, 75007 France |
| Alfa Laval | F | ADR (American Depository Receipt) | Sweden | Rudeboksvagen 1, Lund, Skane, 226 55 SE |
| AP Moeller - Maersk A/S | F | ADR (American Depository Receipt) | Denmark | Esplanaden 50, Koebenhavn K, Denmark-NA, 1263 DK |
| Aeon Co., Ltd. | F | ADR (American Depository Receipt) | Japan | 1-5-1 Nakase, Mihama-ku, Chiba-Shi, Chiba-Ken, 261-8515 Japan |

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|--------------------------------|---|--------------------------------------|-----------|--|
| Assa Abloy AB | F | ADR (American Depository Receipt) | Sweden | Klarabergsviadukt en 90, Stockholm, 111 64 SE |
| ATI Inc. | F | Common Stock | Texas | 2021 McKinney Avenue, Suite 1100, Dallas, TX, 75201, US |
| AXA SA | F | ADR (American Depository Receipt) | France | 25 avenue Matignon, Paris, Ile-de-France, 75008 France |
| Beiersdorf AG | F | ADR (American Depository Receipt) | Germany | Unnastrasse 48, Hamburg, 20245 Germany |
| Bankinter SA | F | ADR (American Depository Receipt) | Spain | Ps de la Castellana, 29, Madrid, 28046 Spain |
| Bayerische Motoren Werke AG | F | ADR (American Depository Receipt) | Germany | Petuelring 130, Muenchen, Bayern, 80788 Germany |
| Brenntag SE | F | ADR (American Depository Receipt) | Germany | Messeallee 11, Essen, Nordrhein-Westfal en, 45131 Germany |
| Brambles Limited | F | ADR (American Depository Receipt) | Australia | Level 29, 255 George St, Sydney, New South Wales, 2000 AU |

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|-----------------------------------|---|-----------------------------------|----------------|---|
| Bunzl Public Limited Company | F | ADR (American Depositary Receipt) | United Kingdom | York House, 45 Seymour Street, London, United Kingdom-NA, W1H 7JT GB |
| Compagnie Financiere Richemont SA | F | Common Stock | Switzerland | Chemin de la Chenaie 50, Bellevue, Geneve, 1293 CH |
| Capri Holdings Limited | F | Common Stock | United Kingdom | 90 Whitfield Street, 2nd Floor, London, United Kingdom-NA, W1T 4EZ GB |
| CSL Limited | F | ADR (American Depositary Receipt) | Australia | 45 Poplar Road, Parkville, Melbourne, Victoria, 3052 AU |
| HF Sinclair Corporation | F | Common Stock | Texas | 2828 N. Harwood, Suite 1300, Dallas, TX, 75201, US |
| DNB Bank ASA | F | ADR (American Depositary Receipt) | Norway | Dronning Eufemias Gate 30, Oslo, 0191 Norway |
| Daiwa House Industry Co., Ltd | F | ADR (American Depositary Receipt) | Japan | 3-3-5, Umeda, Kita-ku, Osaka-Shi, Osaka-FU, 530-8241 JP |
| Erste Group Bank AG | F | ADR (American Depositary Receipt) | Austria | Am Belvedere 1, Wien, 1100 AT |

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|-----------------------------|---|-----------------------------------|----------------|---|
| EDP Energias de Portugal SA | F | ADR (American Depository Receipt) | Portugal | Avenida 24 de Julho 12, Lisboa, Portugal-NA 1249-300 PT |
| Elevance Health, Inc. | F | Common Stock | Indiana | 220 Virginia Avenue, Indianapolis, IN, 46204, US |
| Enagas SA | F | ADR (American Depository Receipt) | Spain | Paseo de los Olmos, 19, Madrid, 28005 Spain |
| E On SE | F | ADR (American Depository Receipt) | Germany | Bruesseler Platz 1, Essen, Nordrhein-Westfalen, 45131 DE |
| Ferguson PLC (XNYS:FERG) | F | Common Stock | United Kingdom | 1020 Eskdale Road, Winnersh Triangle, Wokingham, Berkshire, RG41 5TS GB |
| First Hawaiian, Inc. | F | Common Stock | Hawaii | 999 Bishop St., Honolulu, HI, 96813 4423, US |
| Fast Retailing Co., Ltd. | F | ADR (American Depository Receipt) | Japan | 10717-1, Sayama, Yamaguchi-Shi, Yamaguchi-Ken, 754-0894 Japan |
| GXO Logistics, Inc. | F | Common Stock | Connecticut | Two American Lane, Greenwich, CT, 06831, US |

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|-----------------------------------|---|--------------------------------------|-------------|---|
| Henkel AG & Co KgaA | F | ADR (American Depository Receipt) | Germany | Henkelstrasse 67, Duesseldorf, Nordenrhein-Westf alen, 40589 DE |
| Heineken Holding NV | F | Common Stock | Netherlands | Tweede Weteringplantsoen 5, PO Box 28, Amsterdam, Noord-Holland, 1017 ZD NL |
| Hoya Corporation | F | ADR (American Depository Receipt) | Japan | 20F, Nittochi Nishishinjuku Bldg., 5-10-1, Nishi-Shinjuku, Shinjuku-ku, Tokyo-To 160-8347 Japan |
| Herc Holdings Inc. | F | Common Stock | Florida | 27500 Riverview Center Blvd., Bonita Springs, FL, 34134 4325, US |
| Hitachi, Ltd. | F | ADR (American Depository Receipt) | Japan | Nihon Seimei Marunouchi Bldg., 1-6-6, Marunouchi, Chiyoda-Ku, Tokyo-To, 100-8280 JP |
| Hypera SA | F | ADR (American Depository Receipt) | Brazil | Rua Nova Cidade, 404, Vila Olimpia, Sao Paolo, 04.547-070 Brazil |
| Inmode Ltd | F | Common Stock | Israel | Tavor Building, Sha'ar Yokneam, Pob 533, Yokneam, 2069200 IL |
| Ionis Pharmaceuticals, Inc. | F | Common Stock | California | 2855 Gazelle Court, Carlsbad, CA, 92010, US |

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| Intesa Sanpaolo SpA | F | ADR (American Depositary Receipt) | Italy | via Monte di Pietà, 8, Milano, 20121 IT |
| Jeronimo Martins SGPS SA | F | ADR (American Depositary Receipt) | Portugal | Rua Actor Antonio Silva, No 7, Lisboa, Portugal-NA, 1649-033 PT |
| Koninklijke KPN NV | F | ADR (American Depositary Receipt) | Netherlands | Wilhelminakade 123, Rotterdam, Zuid-Holland, 3072 AP NL |
| Kubota Corporation | F | ADR (American Depositary Receipt) | Japan | 1-2-47, Shikitsu-Higashi, Naniwa-ku, Osaka-Shi, Osaka-FU, 556-8601 JP |
| Medpace Holdings, Inc. | F | Common Stock | Ohio | 5375 Medpace Way, Cincinnati, OH, 45227 1543, US |
| Munich Reinsurance Company | F | ADR (American Depositary Receipt) | Germany | Koeniginstr. 107, Muenchen, Bayern, 80802 DE |
| Pernod Ricard SA | F | Common Stock | France | 5 Cours Paul Ricard, Paris Cedex 08, Paris, Ile-de-France, 75380 FR |
| Cohen & Steers Real Estate Opportunities & Income Fund | F | Common Stock | New York | 280 Park Avenue, 10th Floor, New York, NY, 10017, US |

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|-------------------------------|---|-----------------------------------|---------------|---|
| Regal Rexnord Corporation | F | Common Stock | Wisconsin | 111 West Michigan Street, Milwaukee, WI, 53203 2903, US |
| Swisscom Ltd. | F | ADR (American Depositary Receipt) | Switzerland | Alte Tiefenaustrasse 6, Bern, Bern, 3050 CH |
| Atlassian Corporation | F | Common Stock | California | 350 Bush Street, Floor 13, San Francisco, CA, 94104, US |
| TOPGOLF Callaway Brands Corp. | F | Common Stock | California | 2180 Rutherford Rd., Carlsbad, CA, 92008 7328, US |
| MTU Aero Engines AG | F | ADR (American Depositary Receipt) | Germany | Dachauer Strasse 65, Muenchen, Bayern, 80995 DE |
| Mazda Motor Corporation | F | ADR (American Depositary Receipt) | Japan | 3-1, Shinchii, Fuchu-cho, AKI-GUN, Hiroshima-Ken, 730-8670 JP |
| Nikon Corporation | F | ADR (American Depositary Receipt) | Japan | 2F Shinagawa Intercity Tower C, 2-15-3, Konan, MINATO-KU, TOKYO-TO, 108-6290 JP |
| Nomad Foods Limited | F | Common Stock | Great Britain | Bedfont Lakes Business Park, No. 1 New Square, Feltham, Middlesex, TW14 8HA GB |

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|--|---|-----------------------------------|---------------|---|
| Nissan Motor Co., Ltd. | F | ADR (American Depository Receipt) | Japan | 1-1-1, Takashima, Nishi-ku, YOKOHAMA-SHI, Kanagawa-Ken, 220-8686 JP |
| OneMain Holdings, Inc. | F | Common Stock | Indiana | 601 NW 2nd St, Evansville, IN, 47708 1013, US |
| Opera Limited | F | ADR (American Depository Receipt) | Norway | Vitaminveien 4, Oslo, 0485 NO |
| Pandora A/S | F | ADR (American Depository Receipt) | Denmark | Havneholmen 17-19, Copenhagen V, Copenhagen, Denmark-NA, 1561 DK |
| Roche Holding Ltd (OTCM:RHHBY) | F | ADR (American Depository Receipt) | Switzerland | Grenzacherstrasse 124, Basel, Basel-Stadt, 4058 CH |
| International Distributions Services PLC | F | ADR (American Depository Receipt) | Great Britain | 100 Victoria Embankment, London, United Kingdom-NA, EC4Y 0HQ GB |
| Rentokil Initial PLC | F | ADR (American Depository Receipt) | Great Britain | Riverbank, Meadows Business Park, Blackwater, Camberley, Surrey, GU17 9AB, GB |
| Sampo Oyj | F | ADR (American Depository Receipt) | Finland | Fabianinkatu 27, Helsinki, Etela-Suomen, 00100 FI |

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|---|---|--------------------------------------|-------------|--|
| Schneider Electric SE | F | ADR (American Depository Receipt) | France | 35 rue Joseph Monier, Rueil-Malmaison, Ile-de-France, 92500 FR |
| PGIM Short Duration High Yield Opportunities Fund | F | Common Stock | New Jersey | 655 Broad St., 6th Fl, Newark, NJ, 07102, US |
| Sonic Healthcare Limited | F | ADR (American Depository Receipt) | Australia | Level 22, 225 George Street, Sydney, New South Wales, 2000 AU |
| Siemens Healthineers AG | F | ADR (American Depository Receipt) | Germany | Henkestrasse 127, Erlangen, Bayern, 91052 DE |
| Suncorp Group Limited | F | ADR (American Depository Receipt) | Australia | Level 23, 80 Ann Street, Brisbane, Queensland, 4000 AU |
| Snam SpA | F | ADR (American Depository Receipt) | Italy | Piazza Santa Barbara, 7, San Donato Milanese, Milano, 20097 IT |
| S&P Global Inc. | F | Common Stock | New York | 55 Water Street, New York, NY, 10041 0004, US |
| Spark New Zealand Limited | F | ADR (American Depository Receipt) | New Zealand | Private Bag 92028, Auckland, New Zealand-NA, 1010 NZ |

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|--------------------------------------|---|-----------------------------------|-------------|---|
| Sun Hung Kai Properties Limited | F | ADR (American Depositary Receipt) | Hong Kong | 45th Floor, Sun Hung Kai Centre, 30 Harbour Road HK |
| Sumitomo Mitsui Trust Holdings, Inc. | F | ADR (American Depositary Receipt) | Japan | 1-4-1, Marunouchi, Chiyoda-Ku, Tokyo-TO, 100-8233 Japan |
| Svenska Handelsbanken AB | F | ADR (American Depositary Receipt) | Sweden | Kungstradgardsgatan 2, Stockholm, 106 70 SE |
| Sika Ltd | F | ADR (American Depositary Receipt) | Switzerland | Zugerstrasse 50, Baar, Zug, 6341 CH |
| Telenor Asa | F | ADR (American Depositary Receipt) | Norway | Snaroyveien 30, Fornebu, Akershus, 1360 NO |
| Tenable Holdings, Inc. | F | Common Stock | Maryland | 6100 Merriweather Drive, Columbia, MD, 21044, US |
| Terna Rete Elettrica Nazionale SpA | F | ADR (American Depositary Receipt) | Italy | Viale Egidio Galbani, 70, Roma, Roma, 00156 IT |
| TKO Group Holdings, Inc. | F | Common Stock | New York | 200 Fifth Ave, New York, NY, 10010, US |

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|------------------------|---|-----------------------------------|-----------|--|
| Telstra Group Limited | F | ADR (American Depositary Receipt) | Australia | 242 Exhibition Street, Level 41, Melbourne, Victoria, 3000 AU |
| Toshiba Corporation | F | ADR (American Depositary Receipt) | Japan | Toshiba Bldg., 1-1-1, Shibaura, MINATO-KU, Tokyo-TO, 105-8001 JP |
| Tapestry | F | Common Stock | New York | 10 Hudson Yards, New York, NY, 10001, US |
| Trane Technologies PLC | F | Common Stock | Ireland | 170/175 Lakeview Drive, Airside Business Park, Swords, Dublin IE |
| Ucb SA | F | ADR (American Depositary Receipt) | Belgium | Allee de la Recherche, 60, Anderlecht, Bruxelles-Capitale, 1070 BE |
| UOL Group Limited | F | ADR (American Depositary Receipt) | Signapore | 101 Thomson Road, #33-00 United Square, 307591 SG |
| US Foods Holding Corp. | F | Common Stock | Illinois | 9399 W. Higgins Rd., Suite 100, Rosemont, IL, 60018, US |
| Vici Properties Inc. | F | Common Stock | New York | 535 Madison Ave, 20th Floor, New York, NY, 10022, US |

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| Western Asset Diversified Income Fund (XNYS:WDI) | F | Common Stock | New York | Legg Mason, 620 Eighth Ave, 47th Floor, New York, NY, 10018, US |
| Willscot Mobile Mini Holdings Corp. | F | Common Stock | Arizona | 4646 E. Van Buren Street, Suite 400, Phoenix, AZ, 85008, US |
| Zurich Insurance Group Ltd | F | ADR (American Depository Receipt) | Switzerland | Mythenquai 2, Zuerich, Zuerich, 8002 CH |

26. Other than the Financial Investments identified in Question 25, identify every Financial Investment that your spouse and/or any dependent child(ren) residing in your household owned directly or through a Business as of December 31, 2022, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each. For any Financial Investment not included on the drop-down list of publicly traded stock, you must provide the issuer's principal place of business or state of incorporation as well as its address.

Filer reported none.

27. Identify every Financial Investment that was owned as of December 31, 2022, by a Trust of which you were a beneficiary, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each. For any Financial Investment not included on the drop-down list of publicly traded stock, you must provide the issuer's principal place of business or state of incorporation as well as its address.

Beneficiary Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

| Name of Issuer | Beneficiary | Description of Investment | Principal Place of Business or State of Incorporation | Issuer Address | Name of Trust |
|--|-------------|---------------------------|---|----------------|-----------------------------------|
| Align Technology, Inc. - Common Stock (ALGN) | F | | | | Susannah Stevens Hatch 2011 Trust |
| Adobe Systems Incorporated - Common Stock (ADBE) | F | | | | Susannah Stevens Hatch 2011 Trust |
| Alphabet Inc. - Class A Common Stock (GOOGL) | F | | | | Susannah Stevens Hatch 2011 Trust |
| American Express Company Common Stock (AXP) | F | | | | Susannah Stevens Hatch 2011 Trust |
| American Tower Corporation (REIT) Common Stock (AMT) | F | | | | Susannah Stevens Hatch 2011 Trust |
| Amazon.com, Inc. - Common Stock (AMZN) | F | | | | Susannah Stevens Hatch 2011 Trust |

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| American Water Works Company, Inc. Common Stock (AWK) | F | Susannah Stevens Hatch 2011 Trust |
| Autodesk, Inc. - Common Stock (ADSK) | F | Susannah Stevens Hatch 2011 Trust |
| Apple Inc. - Common Stock (AAPL) | F | Susannah Stevens Hatch 2011 Trust |
| The Blackstone Group L.P. Common Units Representing Limited Partnership Interests (BX) | F | Susannah Stevens Hatch 2011 Trust |
| Booz Allen Hamilton Holding Corporation Common Stock (BAH) | F | Susannah Stevens Hatch 2011 Trust |
| Booking Holdings, Inc. | F | Susannah Stevens Hatch 2011 Trust |
| Danaher Corporation Common Stock (DHR) | F | Susannah Stevens Hatch 2011 Trust |

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| Charter Communications, Inc. - Class A Common Stock (CHTR) | F | Susannah Stevens Hatch 2011 Trust |
| FIRST REPUBLIC BANK Common Stock (FRC) | F | Susannah Stevens Hatch 2011 Trust |
| Microsoft Corporation - Common Stock (MSFT) | F | Susannah Stevens Hatch 2011 Trust |
| Home Depot, Inc. (The) Common Stock (HD) | F | Susannah Stevens Hatch 2011 Trust |
| HealthEquity, Inc. - Common Stock (HQY) | F | Susannah Stevens Hatch 2011 Trust |
| O'Reilly Automotive, Inc. - Common Stock (ORLY) | F | Susannah Stevens Hatch 2011 Trust |
| PayPal Holdings, Inc. - Common Stock (PYPL) | F | Susannah Stevens Hatch 2011 Trust |

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| Charles Schwab Corporation (The) Common Stock (SCHW) | F | Susannah Stevens Hatch 2011 Trust |
| Sherwin-Williams Company (The) Common Stock (SHW) | F | Susannah Stevens Hatch 2011 Trust |
| Salesforce.com Inc Common Stock (CRM) | F | Susannah Stevens Hatch 2011 Trust |
| UnitedHealth Group Incorporated Common Stock (DE) (UNH) | F | Susannah Stevens Hatch 2011 Trust |
| Thermo Fisher Scientific Inc Common Stock (TMO) | F | Susannah Stevens Hatch 2011 Trust |
| Vanguard Short Term Investment Grade Admiral CL (VFSUX) | F | Susannah Stevens Hatch 2011 Trust |
| Waste Connections, Inc. Common Stock (WCN) | F | Susannah Stevens Hatch 2011 Trust |

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| Visa Inc.(V) | F | Susannah Stevens Hatch 2011 Trust |
| Vanguard S&P 500 ETF(VOO) | F | The Susannah Stevens Hatch 2011 Trust |
| Artisan International Value Fd Insti Shs (APHKX) | F | The Susannah Stevens Hatch 2011 Trust |
| Vanguard Short-Term Tax-Exempt Fd Admiral (VWSUX) | F | The Susannah Stevens Hatch 2011 Trust |
| WCM Focused International Growth Fund Insti Cl (WCMIX) | F | The Susannah Stevens Hatch 2011 Trust |
| Vanguard Intermediate-Term Tax-Exempt Admiral CL (VWIUX) | F | The Susannah Stevens Hatch 2011 Trust |
| RBC Emerging Markets Equity Fund Cl I (REEIX) | F | The Susannah Stevens Hatch 2011 Trust |

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|---|---|--------------|------------|---|---|
| Calvert Unconstrained Bond Fund Class I (CUBIX) | F | | | | The Susannah Stevens Hatch 2011 Trust |
| Treasury Fund: Fidelity Treasury Fund (FZFX) | F | | | | The Susannah Stevens Hatch 2011 Trust |
| Walden SMID Cap Innovations Fund (WASMX) | F | | | | The Susannah Stevens Hatch 2011 Trust |
| AB Trust - AB Discovery Value Fund - Advisor Class (ABYSX) | F | | | | The Susannah Stevens Hatch 2011 Trust |
| Meta Platforms Inc | F | Common Stock | California | 1 Meta Way, Menlo Park, CA, 94025, US | Susannah Stevens Hatch 2011 Trust |
| Fortive Corp Com | F | Common Stock | Washington | 6920 Seaway Blvd, Everett, WA, 98203, US | Susannah Stevens Hatch 2011 Trust |
| S&P Global Inc. | F | Common Stock | New York | 55 Water Street, New York, NY, 10041, US | Susannah Stevens Hatch 2011 Trust |

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|--|---|--------------|----------|---|---|
| Westinghouse Air Brake Technologies Corporation Common Stock (WAB) | F | | | | Susannah Stevens Hatch 2011 Trust |
| Vanguard Inflation Protected Securities Fund Admiral Shares (VAIPX) | F | | | | Susannah Stevens Hatch 2011 Trust |
| LS Opportunity Fund (LSOFX) | F | | | | Susannah Stevens Hatch 2011 Trust |
| Artisan Global Opportunities Fund Advisor Shares (APDRX) | F | | | | Susannah Stevens Hatch 2011 Trust |
| Oakmark Global Select Fund Class I (OAKWX) | F | | | | Susannah Stevens Hatch 2011 Trust |
| Artisan International Value Fund Advisor Shares (APDKX) | F | | | | Susannah Stevens Hatch 2011 Trust |
| Harbor International Small Cap Instl | F | Common Stock | Illinois | 111 South Wacker Drive, 34th Floor, Chicago, IL, 60606, US | Susannah Stevens Hatch 2011 Trust |

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| Schwab Fundamental Emerging Markets Large Company Index Fd(SFENX) | F | Susannah Stevens Hatch 2011 Trust |
| Seafarer Overseas Growth & Income Fd Inst Cl(SIGIX) | F | Susannah Stevens Hatch 2011 Trust |
| Fidelity Select Materials Portfolio(FSDPX) | F | Susannah Stevens Hatch 2011 Trust |

28. Other than the Financial Investments identified in Question 27, identify every Financial Investment that was owned as of December 31, 2022, by a Trust of which your spouse and/or any dependent child(ren) residing in your household was a beneficiary, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each. For any Financial Investment not included on the drop-down list of publicly traded stock, you must provide the issuer's principal place of business or state of incorporation as well as its address.

Filer reported none.

NOTE: If the Filer answered "YES" to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member's name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member's address, the Filer was not required to provide that address.

Debts and Mortgages

29. Identify all mortgages, including home equity and reverse mortgage loans, on your Primary Residence, on which more than \$1,000 was owed as of December 31, 2022, where the creditor (person who loaned you the money) is not, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

| Creditor Name | Creditor Address | Mortgage Term | Interest Rate (%) | Termination Year |
|---------------|---|---------------|-------------------|------------------|
| NewRez, LLC | 1100 Virginia Drive, Suite 125, Fort Washington, PA, 19034, US | 30-year | 2.75 | 2050 |

30. Did you have a mortgage, including a home equity or reverse mortgage loan, on any property OTHER than your Primary Residence, on which more than \$1,000 was owed as of December 31, 2022, which you were obligated to pay and where the creditor (person who loaned you the money) is NOT, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative?

Obligor Legend:
Filer = F
Spouse/Child(ren) = S/C
Trust = T

Filer reported none.

31. Identify all mortgages, including home equity and reverse mortgage loans, other than any mortgage on your Primary Residence or any mortgage identified in response to Question 30, on which more than \$1,000 was owed as of December 31, 2022, and which your spouse and/or any dependent child(ren) residing in your household were obligated to pay and where the creditor (person who loaned the money to your spouse and/or dependent child(ren) residing in your household) is not, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Filer reported none.

32. Identify all non-mortgage debts of more than \$1,000 that you owed as of December 31, 2022, IF the person to whom you owed the debt is not, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Filer reported none.

33. Identify all non-mortgage debts of more than \$1,000 that your spouse and/or any dependent child(ren) residing in your household owed as of December 31, 2022, if the person to whom your spouse and/or any dependent child(ren) residing in your household owed the debt is not, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Filer reported none.

34. Identify non-mortgage debts of more than \$1,000 which you owed and which were forgiven at any time during 2022, excluding debts forgiven by a person who is, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Filer reported none.

35. Identify non-mortgage debts of more than \$1,000 that were owed by your spouse and/or any dependent child(ren) residing in your household and were forgiven at any time during 2022, excluding debts forgiven by a person who is, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Filer reported none.

Reimbursements, Gifts, and Honoraria

36. Identify any Reimbursements for expenses in excess of \$100 provided to you at any time during 2022 by any legislative agent or executive agent (lobbyist).

Filer reported none.

36.a Identify any Reimbursements for expenses in excess of \$100, other than those identified in response to Question 36, you received at any time during 2022 from any person having a direct interest in a matter before the governmental body by which you were or are now employed.

Filer reported none.

37. Identify any Reimbursements for expenses in excess of \$100 provided to your spouse and/or any dependent child(ren) residing in your household at any time during 2022 by any legislative agent or executive agent (lobbyist).

Filer reported none.

37.a Identify any Reimbursements for expenses in excess of \$100, other than those identified in response to Question 36, provided to your spouse and/or dependent child(ren) residing in your household at any time during 2022 by any person having a direct interest in a matter before the governmental body by which you were or are now employed.

Filer reported none.

38. Identify any Gifts and/or Honoraria worth more than \$100 provided to you at any time during 2022 by any person having a direct interest in a matter before a governmental body by which you were or are now employed.

Filer reported none.

39. Identify any Gifts and/or Honoraria worth more than \$100 provided to your spouse and/or any dependent child(ren) residing in your household at any time during 2022 by any person having a direct interest in a matter before the governmental body by which you were or are now employed.

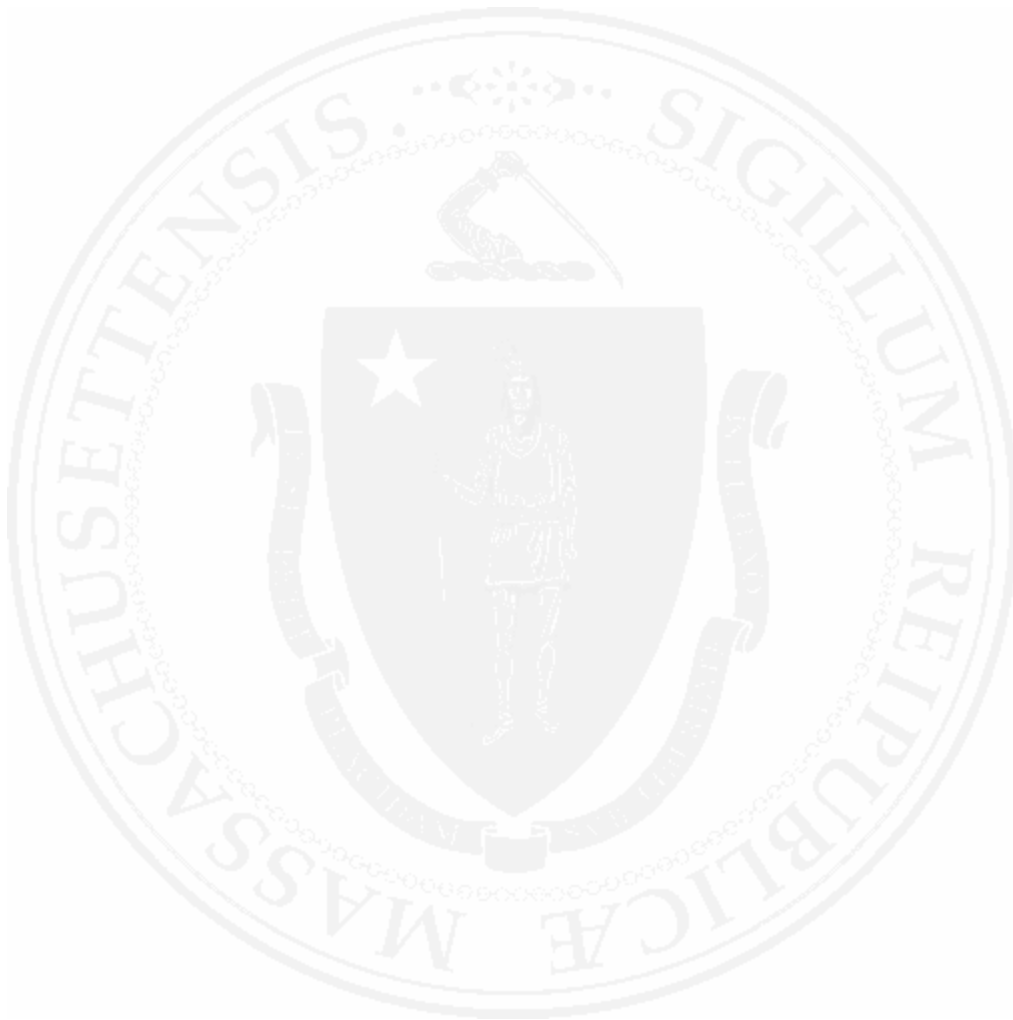
Filer reported none.

NOTE: If the Filer answered “YES” to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member’s name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member’s address, the Filer was not required to provide that address.

Blind Trusts

40. Did you, your spouse and/or any dependent child(ren) residing in your household during 2022, own anything that you have not reported on this Statement of Financial Interests because it was held in a Blind Trust during 2022?

Filer reported none.



CERTIFICATION

I, Susannah Hatch, certify under the pains and penalties of perjury that:

I made a diligent effort to obtain the required information concerning myself and my spouse and/or any dependent child(ren); and

The information provided on this form is true and complete, to the best of my knowledge.

Submitted: 12/14/2023

Did your spouse and/or any dependent child(ren) residing in your household decline to disclose information which is necessary to complete this form fully and accurately?

The following are the specific Question(s) which I decline to answer in whole or in part because I assert that the information is privileged by law:

Please explain the basis of your claim of privilege:

IMPORTANT:

1. No DESIGNATED PUBLIC EMPLOYEE shall be allowed to continue in their duties or to receive compensation from public funds unless they have filed a Statement of Financial Interests with the State Ethics Commission.
2. The State Ethics Commission does not accept a faxed or emailed copy of a Statement of Financial Interests for filing.
3. If you were required to amend your Statement of Financial Interests last year, we encourage you to carefully review your 2022 filing before submitting.