

# Statement of Financial Interests for 2023



## CONTACT INFORMATION

**Last Name:**

**First Name and Middle initial:**

Israel

Tristan R

**Work Phone Number:**

**Other Phone:**

(508) 693-0196

Redacted

**Work Email:**

**Other Email:**

tristan.r@verizon.net

**Primary Residence Address:**

Redacted

**Contact mailing address**

Redacted

You indicated that you did have a spouse residing in your household during 2023.

You indicated that you had no dependent child(ren) residing in your household at any time during 2023.

## 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
Dukes County Commission	P.O.190, Edgartown, MA, 02539, US	County Commission	01/01/2008 - 12/31/2024	N/A

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 2023, whether compensated or not, and whether full- or part-time.

Public Agency	Public Agency Name	Address	Position	Amount of Income	Consultant / Contractor?	Services Provided
Municipal	Council on Aging	34 Pinetree Rd, Tisbury, MA, 02568, US	Board Member	N/A	N/A	
Regional	Climate Action Taskforce	33 New York Ave, Oak Bluffs, MA, 02557, US	Board Member	N/A	N/A	

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 2023, 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 2023, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Business Name	Self-employed	Address	Position	Income
Tristan's Landscape	<input checked="" type="checkbox"/>	77 Snake Hollow, Tisbury, MA, 02568, US	Manager	\$100,001 or more

6. Identify any Business from which you were on a leave of absence at any time during 2023, 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 2023, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Business Name	Self-employed	Address	Position
Island Taxidermy	<input checked="" type="checkbox"/>	77 Snake Hollow, Tisbury, MA, 02568, US	

### 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 2023, and provide the required information for each.

Business Name	Address	Percentage of stock	Income
Tristan's Landscape	77 Snake Hollow, Tisbury, MA, 02568, US	100%	\$100,001 or more

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 2023, and provide the required information for each.

Business Name	Address
Island Taxidermy	77 Snake Hollow, Tisbury, MA, 02568, US

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 2023, 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 2023, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Business Name	Address	Position	Income
WMVY Radio	121 Carols way, Tisbury, MA, 02568, US	Trustee	N/A

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 2023, 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, 2023, 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, S/C	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, 2023, 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, 2023, 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, 2023, 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 2023, 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 2023, 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, 2023, 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, 2023, 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, 2023, 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, 2023, 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, 2023, 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, 2023, 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, 2023, 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
Apple Inc. - Common Stock (AAPL)	F, S/C			
Microsoft Corporation - Common Stock (MSFT)	F, S/C			
SPDR Gold Trust (GLD)	F, S/C			
Chevron Corporation Common Stock (CVX)	F, S/C			
Exxon Mobil Corporation Common Stock (XOM)	F, S/C			
Lincoln Financial Group	F, S/C	Annuity	Indiana	Box 3248, Fort Wayne, IN, 46801 2348, US

United Parcel Service Inc	F, S/C	Bond	Georgia	55 Glenlake Parkway N.E., Atlanta, GA, 30328, US
Chubb INA Holdings Inc	F, S/C	Bond	Pennsylvania	436 Walnut St., Philadelphia, PA, 19106, US
Toyota Motor Credit Corp	F, S/C	Bond	Texas	6565 Headquarters Drive, Plano, TX, 75024, US
Home Depot Inc/The	F, S/C	Bond	Georgia	2455 Paces Ferry Rd., Atlanta, GA, 30339, US
Metlife Inc	F, S/C	Bond	Rhode Island	755 Tower Hill Rd., North Kingston, RI, 02852, US
Northrop Grumman Corp	F, S/C	Bond	Virginia	2980 Fairview Park Drive, Falls Church, VA, 22042, US
AT&T inc	F, S/C	Bond	Texas	208 S. Akard St., Dallas, TX, 75202, US
Boston Properties LP	F, S/C	Bond	Massachusetts	800 Boylston St., Boston, MA, 02199 8103, US

Fedex Corp	F, S/C	Bond	Tennessee	942 South Shady Grove Rd, Memphis, TN, 31820, US
Capital One Financial Group	F, S/C	Bond	Virginia	1680 Capital One Drive, Mclean, VA, 22102 3491, US
Verizon Communications inc	F, S/C	Bond	New York	140 West St., New York City, NY, 10007, US
Comcast Corp	F, S/C	Bond	Pennsylvania	1 Comcast Ctr. 1701 JFK Blvd., Philadelphia, PA, 19103, US
Applied Materials Inc	F, S/C	Bond	California	3050 Bowers Ave, Santa Clara, CA, 95054, US
Autozone Inc	F, S/C	Bond	Tennessee	123 S. Front St., Memphis, TN, 38103, US
CSX Corp	F, S/C	Bond	Florida	500 Water St. 15th Floor, Jacksonville, FL, 32202, US
American Electric Power Co Inc	F, S/C	Bond	Ohio	1 Riverside Plaza, Columbus, OH, 43215, US

<p>Dominion Energy Inc</p>	<p>F, S/C</p>	<p>Bond</p>	<p>Virginia</p>	<p>120 Tredegar St, Richmond, VA, 23219, US</p>
<p>Vanguard Total World Stock Index ETF (VT)</p>	<p>F, S/C</p>			
<p>Enterprise Products Partners L.P. Common Stock (EPD)</p>	<p>F, S/C</p>			
<p>Pepsico, Inc. Common Stock (PEP)</p>	<p>F, S/C</p>			
<p>Northrop Grumman Corporation Common Stock (NOC)</p>	<p>F, S/C</p>			
<p>Keurig Green Mountain, Inc. - Common Stock (GMCR)</p>	<p>F, S/C</p>			
<p>AutoZone, Inc. Common Stock (AZO)</p>	<p>F, S/C</p>			
<p>Chevron USA Inc</p>	<p>F, S/C</p>	<p>Bond</p>	<p>California</p>	<p>6001 Bollinger Canyon Rd., San Ramon, CA, 94583, US</p>

American Finance Corp	F, S/C	Bond	California	20800 Madrona Ave, Torrance, CA, 90503, US
Beckton Dickinson and Co	F, S/C	Bond	New Jersey	1 Beckton Drive, Franklin Lakes, NJ, 07417, US
BAT Capital Group	F, S/C	Bond	Deleware	103 Foulk Rd. Suite 120, Wilmington, DE, 19803, US
United health Group	F, S/C	Bond	Minnesota	P.O. Box 1459, Minneapolis, MN, 55440, US
Exelon Corp	F, S/C	Bond	Illinois	10 S Dearborn St, , Chicago, IL, 60603, US
Alphabet Inc	F, S/C	Bond	California	1600 Amphitheatre , Parkway Mountain View, CA, 94043, US
Lockheed Martin Corp	F, S/C	Bond	Maryland	6801 Rockledge Drive , Bethesda, MD, 20817, US
TWDC Enterprises	F, S/C	Bond	California	500 South Buena Vista , South Burbank, CA, 91521, US

Keurig Dr Pepper Inc	F, S/C	Bond	Massachusetts	53 South Avenue, Burlington, MA, 01803, US
Welltower Inc	F, S/C	Bond	Ohio	500 Dorr Street , Toledo, OH, 43615, US
Kinder Morgan	F, S/C	Bond	Texas	1001 Louisiana Street, Suite 1000 , Houston, TX, 77002, US
Fiserv Inc	F, S/C	Bond	Wisconsin	255 Fiserv Dr , Brookfield, WI, 53045, US
Starbucks Inc	F, S/C	Bond	New York	665 Broadway, New York, NY, 10012, US
General Motors Financial Co. Inc.	F, S/C	Bond	Texas	801 Cherry Street Suite 3500 , Fort Worth, TX, 76102, US
AON Corp	F, S/C	Bond	Illinois	200 East Randolph Street , Chicago, IL, 60601, US
Waste Management	F, S/C	Bond	Texas	800 Capitol Street, Suite 3000 , Houston, TX, 77002, US

Sherwin Williams	F, S/C	Bond	Ohio	101 W. Prospect Ave., Cleveland, OH, 44115, US
SPDR Select Sector Fund - Technology (XLK)	F, S/C			
AbbVie Inc. Common Stock (ABBV)	F, S/C			
Abbott Laboratories Common Stock (ABT)	F, S/C			
Accenture plc. Class A Ordinary Shares (Ireland) (ACN)	F, S/C			
Ameren Corporation Common Stock (AEE)	F, S/C			
American Electric Power Company, Inc. Common Stock (AEP)	F, S/C			
Analog Devices, Inc. - Common Stock (ADI)	F, S/C			

Automatic Data Processing, Inc. - Common Stock (ADP)	F, S/C
AvalonBay Communities, Inc. Common Stock (AVB)	F, S/C
Avery Dennison Corporation Common Stock (AVY)	F, S/C
Bank of America Corporation Common Stock (BAC)	F, S/C
Becton, Dickinson and Company Common Stock (BDX)	F, S/C
BlackRock, Inc. Common Stock (BLK)	F, S/C
The Blackstone Group L.P. Common Units Representing Limited Partnership Interests (BX)	F, S/C
Booz Allen Hamilton Holding Corporation Common Stock (BAH)	F, S/C



Bristol-Myers Squibb Company Common Stock (BMJ)	F, S/C
Cisco Systems, Inc. - Common Stock (CSCO)	F, S/C
CME Group Inc. - Class A Common Stock (CME)	F, S/C
CMS Energy Corporation Common Stock (CMS)	F, S/C
Coca-Cola Company (The) Common Stock (KO)	F, S/C
Comcast Corporation - Class A Common Stock (CMCSA)	F, S/C
ConocoPhillips Common Stock (COP)	F, S/C
Crown Castle International Corp. (REIT) Common Stock (CCI)	F, S/C

Cummins Inc. Common Stock(CMI)	F, S/C			
DTE Energy Company Common Stock(DTE)	F, S/C			
Eaton Corporation, PLC Ordinary Shares(ETN)	F, S/C			
Electronic Arts Inc. - Common Stock(EA)	F, S/C			
Elevance Health	F, S/C	Common Stock	Indiana	220 Virginia Ave, Indianapolis, IN, 46204, US
Entergy Corporation Common Stock(ETR)	F, S/C			
EOG Resources, Inc. Common Stock(EOG)	F, S/C			
Eversource Energy (D/B/A) Common Stock(ES)	F, S/C			

Home Depot, Inc. (The) Common Stock (HD)	F, S/C
Honeywell International Inc. Common Stock (HON)	F, S/C
International Business Machines Corporation Common Stock (IBM)	F, S/C
Johnson & Johnson Common Stock (JNJ)	F, S/C
KLA-Tencor Corporation - Common Stock (KLAC)	F, S/C
Lam Research Corporation - Common Stock (LRCX)	F, S/C
Linde PLC	F, S/C
Lockheed Martin Corporation Common Stock (LMT)	F, S/C

Marsh & McLennan Companies, Inc. Common Stock (MMC)	F, S/C
McDonald's Corporation Common Stock (MCD)	F, S/C
Medtronic plc. Ordinary Shares (MDT)	F, S/C
Merck & Company, Inc. Common Stock (new) (MRK)	F, S/C
Microchip Technology Incorporated - Common Stock (MCHP)	F, S/C
Mondelez International, Inc. - Class A Common Stock (MDLZ)	F, S/C
Morgan Stanley Common Stock (MS)	F, S/C
NextEra Energy, Inc. Common Stock (NEE)	F, S/C

Nike, Inc. Common Stock (NKE)	F, S/C
Northrop Grumman Corporation Common Stock (NOC)	F, S/C
Packaging Corporation of America Common Stock (PKG)	F, S/C
Parker-Hannifin Corporation Common Stock (PH)	F, S/C
Pepsico, Inc. Common Stock (PEP)	F, S/C
Philip Morris International Inc Common Stock (PM)	F, S/C
PNC Financial Services Group, Inc. (The) Common Stock (PNC)	F, S/C
PPG Industries, Inc. Common Stock (PPG)	F, S/C

Procter & Gamble Company (The) Common Stock (PG)	F, S/C			
Texas Instruments Incorporated - Common Stock (TXN)	F, S/C			
Trane Technologies	F, S/C	Common Stock	Ireland	170/175 Lakeview Drive, Dublin, Ireland
Union Pacific Corporation Common Stock (UNP)	F, S/C			
United Parcel Service, Inc. Common Stock (UPS)	F, S/C			
UnitedHealth Group Incorporated Common Stock (DE) (UNH)	F, S/C			
Wal-Mart Stores, Inc. Common Stock (WMT)	F, S/C			
Waste Management, Inc. Common Stock (WM)	F, S/C			

WEC Energy Group, Inc. Common Stock (WEC)	F, S/C			
Wells Fargo & Company Common Stock (WFC)	F, S/C			
Campbell Soup	F, S/C	Bond	New Jersey	1 Camden Place, Camden, NJ, 08103, US
Citi Group Inc	F, S/C	Bond	New York	388 Greenwich Street, New York, NY, 10013, US
Regions Financial Corp	F, S/C	Bond	Alabama	250 Riverchase Parkway, Birmingham, AL, 35244, US
ERP Operating LP	F, S/C	Bond	Chicago	2 North Riverside Plaza #400, Chicago, IL, 60606, US
Expedia Group	F, S/C	Bond	Seattle	1111 Expedia Group Way West, Seattle, WA, 98119, US
McDonalds Corp	F, S/C	Bond	Chicago	110 Carpenter Street, Chicago, IL, 60607, US

Air Products & Chemicals	F, S/C	Bond	Pennsylvania	1900 Air Products Blvd, Allentown, PA, 18106 5500, US
Marriot International Inc.	F, S/C	Bond	Maryland	7750 Wisconsin Ave, Bethesda, MD, 20814, US
Sumtomo Mitsui Financial Group Inc	F, S/C	Bond	Japan	1-1-2, Marunouchi, Chiyoda-ku, Chiyoda-ku, Japan
AIM Premier Portfolio - Institutional Class (IPPXX)	F, S/C			
QUALCOMM Incorporated - Common Stock (QCOM)	F, S/C			
Adobe Systems Incorporated - Common Stock (ADBE)	F, S/C			
Agilent Technologies, Inc. Common Stock (A)	F, S/C			
American Tower Corporation (REIT) Common Stock (AMT)	F, S/C			



Amphenol Corporation Common Stock (APH)	F, S/C
Ball Corporation Common Stock (BLL)	F, S/C
Bank of New York Mellon Corporation (The) Common Stock (BK)	F, S/C
Avago Technologies Limited - Ordinary Shares (AVGO)	F, S/C
Charles Schwab Corporation (The) Common Stock (SCHW)	F, S/C
Danaher Corporation Common Stock (DHR)	F, S/C
Dollar General Corporation Common Stock (DG)	F, S/C
Ecolab Inc. Common Stock (ECL)	F, S/C

Fidelity National Information Services, Inc. Common Stock(FIS)	F, S/C
Gartner, Inc. Common Stock(IT)	F, S/C
General Mills, Inc. Common Stock(GIS)	F, S/C
Genuine Parts Company Common Stock(GPC)	F, S/C
IDEX Corporation Common Stock(IEX)	F, S/C
IDEXX Laboratories, Inc. - Common Stock(IDXX)	F, S/C
Illinois Tool Works Inc. Common Stock(ITW)	F, S/C
Intercontinental Exchange Inc. Common Stock(ICE)	F, S/C

Intuit Inc. - Common Stock (INTU)	F, S/C
Intuitive Surgical, Inc. - Common Stock (ISRG)	F, S/C
JP Morgan Chase & Co. Common Stock (JPM)	F, S/C
Mastercard Incorporated Common Stock (MA)	F, S/C
Lowe's Companies, Inc. Common Stock (LOW)	F, S/C
TE Connectivity Ltd. New Switzerland Registered Shares (TEL)	F, S/C
Thermo Fisher Scientific Inc Common Stock (TMO)	F, S/C
TJX Companies, Inc. (The) Common Stock (TJX)	F, S/C

ProLogis, Inc. Common Stock (PLD)	F, S/C
Public Storage Common Stock (PSA)	F, S/C
Southern Company (The) Common Stock (SO)	F, S/C
VeriSign, Inc. - Common Stock (VRSN)	F, S/C
Verisk Analytics, Inc. - Common Stock (VRSK)	F, S/C
Visa Inc. (V)	F, S/C
Zoetis Inc. Class A Common Stock (ZTS)	F, S/C
Xylem Inc. Common Stock New (XYL)	F, S/C

iShares 10-20 Year Treasury Bond ETF(TLH)	F, S/C
iShares Core MSCI EAFE ETF(IEFA)	F, S/C
iShares Core S&P 500 ETF(IVV)	F, S/C
iShares U.S. Financial Services ETF(IYG)	F, S/C
SPDR Select Sector Fund - Industrial(XLI)	F, S/C
Materials Select Sector SPDR(XLB)	F, S/C
Vanguard Extended Duration Treasury ETF(EDV)	F, S/C
Vanguard Intermediate-Term Corporate Bond ETF(VCIT)	F, S/C

Vanguard Intermediate-Term Government Bond ETF (VGIT)	F, S/C
Vanguard Short-Term Corporate Bond ETF (VCSH)	F, S/C
Vanguard Total Bond Market ETF (BND)	F, S/C
T-Mobile US, Inc. Common Stock (TMUS)	F, S/C
Piedmont Natural Gas Company, Inc. Common Stock (PNY)	F, S/C
Centene Corporation Common Stock (CNC)	F, S/C
Emerson Electric Company Common Stock (EMR)	F, S/C
Lincoln National Corporation Common Stock (LNC)	F, S/C

Anheuser-Busch Inbev SA Sponsored ADR (Belgium) (BUD)	F, S/C			
General Dynamics Corporation Common Stock (GD)	F, S/C			
Republic Services, Inc. Common Stock (RSG)	F, S/C			
Totalenergies Capital International SA	F, S/C	Common Stock	France	2, Place Jean Millier, La Défense 6, , Courbevoie, France 92400
State Street Global Advisors	F, S/C	Boston	State Street Global Advisors Channel Center 1 Iron Street Boston, MA 02210	1 Iron Street, Boston, MA, 02210, US
Goldman Sachs ActiveBeta U.S. Large Cap Equity ETF (GSLC)	F, S/C			
(JPM) JP Morgan	F, S/C	Common Stock	New York	383 Madison Avenue, , New York, NY, 10017, US
JP Morgan (JEPI)	F, S/C	portfolio	New York	383 Madison Ave, New York, NY, 10017, US

(XLC) (XLY)State Street Global Advisors	F, S/C	closed end fund	Boston, Massachusetts	1 Iron St, Boston, MA, 02210, US
Veralto (VLTO)	F, S/C	Common Stock	Waltham, Massachusetts	225 Wyman Street, Suite 250 , Waltham, MA, 02451, US
Valero Energy Corporation Common Stock(VLO)	F, S/C			

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, 2023, 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, 2023, 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

Filer reported none.



28. Other than the Financial Investments identified in Question 27, identify every Financial Investment that was owned as of December 31, 2023, 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, 2023, 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
Truist		30	4.0	2041
Cape Cod Five	P.O. Box 10, Orleans, MA, 02653, US	20	4.75	2027

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, 2023, 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, 2023, 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, 2023, 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, 2023, 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 2023, 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 2023, 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 2023 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 2023 from any person having a direct interest in legislation, legislative action, or a matter before a governmental body.

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 2023 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 37, provided to your spouse and/or dependent child(ren) residing in your household at any time during 2023 by any person having a direct interest in legislation, legislative action, or a matter before a governmental body.

Filer reported none.

38. Identify any Gifts and/or Honoraria worth more than \$100 provided to you at any time during 2023 by any person having a direct interest in legislation, legislative action, or a matter before a governmental body.

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 2023 by any person having a direct interest in legislation, legislative action, or a matter before a governmental body.

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 2023, own anything that you have not reported on this Statement of Financial Interests because it was held in a Blind Trust during 2023?

Filer reported none.

## CERTIFICATION

I, Tristan R Israel, 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: 04/07/2024

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 2023 filing before submitting.