



FINANCIAL DISCLOSURE STATEMENT

State Form 40876 (R13 / 1-17)
OFFICE OF THE INSPECTOR GENERAL
IC 4-2-6-8

Received

For the calendar year

2024

Reset Form

Check if this is an amendment to your current statement.

Please read guidelines on page 4.

FEB - 6 2024

Form with fields for Name (last), Name (first), Name (middle), Spouse's name (last), Office address (number and street), City, ZIP code, Office telephone number, Office e-mail address (required).

I am filing this statement as a: (please select one)
Candidate for office
Member of the INPRS
Incumbent officeholder
Individual with final purchasing authority
Appointing authority

Office or agency: Governor
Job title: Governor

EACH PART MUST BE ANSWERED. WORDS IN BOLD ITALICS ARE INCLUDED IN THE DEFINITIONS.

If you have information to report below, select YES. If no information, select NO.
Yes No

PART 1 - GIFTS

List the name and address of any person known to have a business relationship with the agency of the state officer or employee or the office sought by the candidate, and from whom the state officer, candidate, or the employee, or that individual's spouse or unemancipated children received a gift or gifts having a total fair market value in excess of one hundred dollars (\$100).

Table with 3 columns: Name (last), Address (city), ZIP code. Multiple rows for reporting gifts.

If you have information to report below, select YES. If no information, select NO.
Yes No

PART 2 - REAL PROPERTY INTERESTS

List the location of all real property in which you, your spouse, or your unemancipated children have equitable or legal interest either amounting to five thousand dollars (\$5,000) or more or comprising ten percent (10%) of your net worth or the net worth of your spouse or your unemancipated children. You need not include your residence unless it also serves as income property.

Property and its location: See Exhibit A

If you have information to report below, select YES. If no information, select NO.
Yes No

PART 3 - NON-STATE EMPLOYERS

List the name of your employer(s) and the employer(s) of your spouse and the nature of each employer's business.

Your employer: Buckingham Companies, Nature of business: Real Estate
Spouse's employer: N/A, Nature of business:

If you have information to report below, select YES. If no information, select NO.  Yes  No

**PART 4 - SOLE PROPRIETORSHIP OR PROFESSIONAL PRACTICE**

List any sole proprietorship owned or professional practice operated by you or your spouse and the nature of the business.

Name of your business	Nature of business
Name of spouse's business	Nature of spouse's business

Do any clients for these businesses listed above have a **business relationship** with your agency (or in the case of a candidate, with the office sought)?  
 Yes  No

List the name of any client or customer from whom you or your spouse received more than thirty-three percent (33%) of your (or your spouse's) non-state income in a year.

If you have information to report below, select YES. If no information, select NO.  Yes  No

**PART 5 - PARTNERSHIPS**

List any partnership in which you or your spouse is a member and the nature of the partnership business.

Name of partnership <b>See Exhibit B</b>	Nature of partnership
Name of spouse's partnership	Nature of spouse's partnership

If you have information to report below, select YES. If no information, select NO.  Yes  No

**PART 6 - OFFICER OR DIRECTOR OF CORPORATION**

List the name of any corporation in which you or your spouse is an officer or director and the nature of the corporation's business. Churches need not be listed.

Name of corporation <b>Buckingham Companies</b>	Nature of business <b>Real Estate</b>
Name of spouse's corporation <b>N/A</b>	Nature of spouse's business

If you have information to report below, select YES. If no information, select NO.  Yes  No

**PART 7 - STOCKHOLDER OF CORPORATION**

List the name of any corporation in which you, your spouse, or your unemancipated children own stock or stock options having a fair market value in excess of ten thousand dollars (\$10,000). A time or demand deposit in a financial institution or insurance policy need not be listed.

Name of corporation	Yours	Spouse's	Children's
<b>See Exhibit C</b>			
Name of corporation			
Name of corporation			

If you have information to report below, select YES. If no information, select NO.  Yes  No

**PART 8 - MOST RECENT EMPLOYER**

List the name and address of your most recent former employer.

Name of your most recent former employer <b>Buckingham Companies</b>	Street address (number and street) <b>941 N Meridian St.</b>		
	City <b>Indianapolis</b>	State <b>Indiana</b>	ZIP code <b>46204</b>

COMMENTS

Please place any comments in the fields below.

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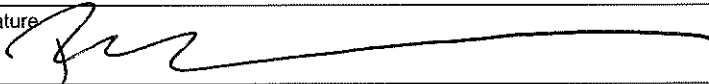
AFFIRMATION

I swear or affirm, under the penalty of perjury, that the facts as presented on this Financial Disclosure Statement are true, complete, and correct to the best of my knowledge and belief.

I understand that I may file an amended statement upon discovery of additional information required to be reported.

I acknowledge awareness of Indiana Code 4-2-6-8(d) under which a failure to file in a timely manner or filing a deficient statement is subject to a civil penalty at the rate of not more than **ten dollars (\$10) for each day the statement remains delinquent or deficient. The maximum penalty under this subsection is one thousand dollars (\$1,000).** I also acknowledge awareness of Indiana Code 4-2-6-8(e) under which a person who intentionally or knowingly files a false statement commits a class A infraction.

Personal signature



Date signed (month, day, year)

02/05/2024

Mail or deliver to the following address:

Office of the Inspector General  
315 West Ohio Street, Room 104  
Indianapolis IN 46202-3210  
Telephone: (317) 232-3850

## INSTRUCTIONS

**Each part must be answered.** Incomplete statements will be returned. Please note that the statement must be affirmed and signed. Complete the form by printing legibly or typing. ***Bold italicized*** words in the form are defined below. Financial Disclosure Statements filed with the Office of Inspector General are available for public inspection, photocopying, and possible access on the agency Web site [[www.in.gov/ig](http://www.in.gov/ig)].

## WHO MUST FILE THIS FORM, AND WHEN

- 1) The Governor, Lieutenant Governor, Secretary of State, Auditor of State, Treasurer of State, Attorney General, and Superintendent of Public Instruction, any person who is the appointing authority of an agency, the director of each division of the Department of Administration, any purchasing agent within the Procurement Division of the Department of Administration, the chief investment officer employed by the Indiana public retirement system, any employee of the Indiana public retirement system whose duties include those described in IC 4-2-6-8(A)-(D), any agency employee, special state appointee, former agency employee, or former special state appointed with final purchasing authority or an employee required to do so by rule adopted by the inspector general must file this financial disclosure form no later than February 1 of every year.
- 2) Candidates for Governor, Lieutenant Governor, Secretary of State, Auditor of State, Treasurer of State, Attorney General, and Superintendent of Public Instruction must file this disclosure before filing a declaration of candidacy under IC 3-8-2, petition of nomination under IC 3-8-6, or declaration of intent to be a write-in candidate under IC 3-8-2-2.5, or before a certificate of nomination is filed under IC 3-8-7-8.
- 3) The persons listed in (1) above, must file not later than sixty (60) days after employment or taking office, unless the previous employment or office required the filing of a statement under this section.
- 4) The same persons required to file in (1) above must file not later than thirty (30) days after leaving employment or office, unless the subsequent employment or office requires the filing of a statement under this section.

## DEFINITIONS OF TERMS USED IN THIS FORM

- 1) **"Business relationship"** includes the following:
  - (A) Dealings of a person with an agency seeking, obtaining, establishing, maintaining, or implementing:
    - (i) a pecuniary interest in a contract or purchase with the agency; or
    - (ii) a license or permit requiring the exercise of judgement or discretion by the agency.
  - (B) The relationship a lobbyist has with an agency.
  - (C) The relationship an unregistered lobbyist has with an agency.
- 2) **"Employer"** means any person from whom a state officer or employee or the officer's or employee's spouse received compensation.
- 3) **"Gift"** means the transfer or promise of a transfer of something of value regardless of the form without adequate and lawful consideration or consideration less than that required of others who are not state officers or employees, including the full or partial forgiveness of indebtedness, which is not extended to others who are not state employees on the same terms and conditions. However, "gift" does not include gifts from relatives of less than two hundred fifty dollars (\$250) or campaign contributions subject to IC 3-9-2.
- 4) **"Person"** means any individual, proprietorship, partnership, unincorporated association, trust, business trust, group, limited liability company, or corporation, whether or not operated for profit, or governmental agency or political subdivision.

## Exhibit A

Address	City	State
1000 Berkley Pkwy.	Kansas City	MO
1000 Glenridge Dr.	Louisville	KY
1000 Hollister Ln	Perrysburg	OH
1025 Avent Hill	Raleigh	NC
10250 Gateway Pl	Blue Ash	OH
10272 Steeplechase Dr	Avon	IN
10637 Springfield Pike	Cincinnati	OH
1101 Shady Oak Ct	Terre Haute	IN
1111 E 61st Street	Indianapolis	IN
1145 N Eddy Street	South Bend	IN
1200 Canterchase Drive	Louisville	KY
1430 Bell Rd.	Nashville	TN
14637 Handel Dr	Carmel	IN
1685 E 116th St	Carmel	IN
1825 Jefferson Drive W	Carmel	IN
1900 Windsong Drive	Schaumburg	IL
200 Jackson Street	Columbus	IN
220 S. Ford Road	Zionsville	IN
2201 Williams Glen Blvd	Zionsville	IN
229 S. Delaware St.	Indianapolis	IN
233 E. 70th Street	Indianapolis	IN
25 W. 9th Street	Indianapolis	IN
2533 Woodburn Ave,	Cincinnati	OH
255 S. McCrea St	Indianapolis	IN
26 West Washington Street	Indianapolis	IN
2900 Ridge Rd	Bloomington	IN
30 E Georgia StSte. C	Indianapolis	IN
300 Providence Blvd	Carmel	IN
310 S. Hancock St.	Louisville	KY
3200 Post Woods Dr., NW	Atlanta	GA
3221 Morton St	Anderson	IN
3224 S 9th St	Lafayette	IN
333 S. Delaware St.	Indianapolis	IN
3483 Apollo Ln	West Lafayette	IN
3700 Springhurst Blvd	Louisville	KY
3861 Gable Lane Drive	Indianapolis	IN
39 E 9th Street	Indianapolis	IN
401 Industrial Drive	Carmel	IN
410 West 20th Street	New York	NY
459 Massachusetts Ave	Indianapolis	IN
4685 Grandstand Drive	Windsor	CO
4870 Hunt Rd	Blue Ash	OH
5100 Primary Dr	Durham	NC
564 E Carmel Drive	Carmel	IN
5801 N Olney St	Indianapolis	IN
5934 Carvel Ave	Indianapolis	IN
6104 S Compton St	Indianapolis	IN
6127 College Ave	Indianapolis	IN
615 N East St	Indianapolis	IN
6700 Derby Dr	Gurnee	IL

6710 W Hollow Run Drive	Indianapolis	IN
820-824, 832, 850 North Meridian	Indianapolis	IN
8717 Old Town West Dr.	Indianapolis	IN
900 Meridian St	Indianapolis	IN
902 N Pennsylvania	Indianapolis	IN
905 20th Avenue South	Nashville	TN
923 N Meridian St	Indianapolis	IN
941 N. Meridian Street	Indianapolis	IN
945 Mohawk Hills	Carmel	IN
approx 1775 E 96th St	Indianapolis	IN
approx. 210 3rd Ave. SW	Carmel	IN
approx. 8031 Louisburg Rd	Raleigh	NC
Liberty and Elm Street	Cincinnati	OH

**Exhibit B**

Name of Partnership	Nature of Partnership
106 Carmel Land, LLC	Real Estate
12th and Division Partners, LLC	Real Estate
1351 WHT Land Holdco II, LLC	Real Estate
1351 WHT Land Holdco, LLC	Real Estate
1351 WHT Land II, LLC	Real Estate
1351 WHT Land JV, LLC	Real Estate
1351 WHT Land, LLC	Real Estate
21st Avenue Investors II, LLC	Real Estate
21st Avenue Investors, LLC	Real Estate
21st Avenue Partners, LLC f/k/a Buckingham LVU, LLC	Real Estate
310 NULU Partners BMF I Holdco, LLC	Real Estate
310 NULU Partners BMF I, LLC	Real Estate
410 West 20th Partners, LLC	Real Estate
70th Street Partners, LLC	Real Estate
800 Meridian Housing Partners, LLC	Real Estate
Argyle Indianapolis, LLC	Real Estate
BAL Aviation, LLC	Transportation
BAL Operations, LLC	Transportation
Barrington Housing Partners, LLC	Real Estate
BC Altitude Holdco, LLC	Real Estate
BC Avent Ferry Holdco, LLC	Real Estate
BC Avent Ferry Partners, LLC	Real Estate
BC Bethpage Partners, LLC	Real Estate
BC Brands Holdco, LLC	Real Estate
BC Brands Partners, LLC	Real Estate
BC Canter Holdco, LLC	Real Estate
BC Canter Partners, LLC	Real Estate
BC Carmel Corner, LLC	Real Estate
BC Carmel Midtown Partners, LLC	Real Estate
BC Center Point Holdco, LLC	Real Estate
BC Center Point Partners, LLC	Real Estate
BC Estero, LLC	Real Estate
BC EWH Project Partners, LLC	Real Estate
BC Gramercy Holdings II, LLC	Real Estate
BC Gramercy Holdings III, LLC	Real Estate
BC Gramercy I Holdings, LLC	Real Estate
BC Gramercy I, LLC	Real Estate
BC Gramercy II, LLC	Real Estate
BC Gramercy III, LLC	Real Estate
BC Louisburg Holdco, LLC	Real Estate
BC Louisburg Partners, LLC	Real Estate
BC OTR Cincinnati, LLC	Real Estate
BC OTR L&E RH, LLC	Real Estate
BC OTR School, LLC	Real Estate
BC Real Street Holdco, LLC	Real Estate
BC Real Street Partners, LLC	Real Estate
BC Rosemont Partners, LLC	Real Estate
BC Services, LLC	Operations
BC Steeplechase Holdco, LLC	Real Estate
BC Steeplechase Partners, LLC	Real Estate
BC White River Holdco, LLC	Real Estate
BC White River Partners, LLC	Real Estate
BC Winds Holdco, LLC	Real Estate
BC Winds Partners, LLC	Real Estate
BCA Partners, LLC	Real Estate
BCAI, LLC	Investments
BCBH Partners, LLC	Real Estate
BCKC Union Berkley Holdings, LLC	Real Estate
BCKC Union Berkley, LLC	Real Estate
BCND Douglas Road Partners, LLC	Real Estate
BCPD Lafayette Partners II, LLC	Real Estate
BCPD Lafayette Partners, LLC	Real Estate
BCPST Carmel Partners, LLC	Real Estate
BCTS Louisville, LLC	Real Estate
Bethpage Holdco, LLC	Real Estate
BF Pershing Place, LLC	Real Estate
BHCS Development, LLC	Real Estate
BHCS Millwood, LLC	Real Estate

Bird Dog Development, LLC	Real Estate
BL Progress Park Partners, LLC	Real Estate
Bloomington Housing Associates, L.P.	Real Estate
BLS Partners, LLC	Real Estate
BMF 2 Gramercy Holdco, LLC	Real Estate
BMF 2 Gramercy, LLC	Real Estate
BP CSU, LLC	Real Estate
Bradford Run Associates, L.P.	Real Estate
BSCM Services, LLC	Operations
Buck Company Midwest RC, LLC	Real Estate
Buck Company Mountain West RC, LLC	Real Estate
Buck Company Southeast RC, LLC	Real Estate
Buckingham 815, LLC	Real Estate
Buckingham 900, LLC	Real Estate
Buckingham 941, LLC	Real Estate
Buckingham 961, LLC	Real Estate
Buckingham Ambassador, LLC	Real Estate
Buckingham BW, LLC	Real Estate
Buckingham Cole, LLC	Real Estate
Buckingham Construction Corporation	Operations
Buckingham DA, LLC	Real Estate
Buckingham Development, Inc.	Real Estate
Buckingham Financial, LLC	Investments
Buckingham Fountains LLC	Real Estate
Buckingham Fund I Co-Invest I REIT Manager, LLC	Real Estate
Buckingham Fund I Co-Invest I, LP	Real Estate
Buckingham Fund I Limited Partners, LLC	Real Estate
Buckingham Fund I Rosemont Holdings, LLC	Real Estate
Buckingham Fund I Rosemont REIT, LLC	Real Estate
Buckingham Fund I Spring Mill Holdings, LLC	Real Estate
Buckingham Fund I Spring Mill REIT, LLC	Real Estate
Buckingham Fund LTIP, LLC	Real Estate
Buckingham Global Accommodations, LLC	Real Estate
Buckingham GP Holdings I, LLC	Real Estate
Buckingham Gurnee II, LLC	Real Estate
Buckingham Gurnee, LLC	Real Estate
Buckingham Harness, LLC	Real Estate
Buckingham Industrial, LLC	Real Estate
Buckingham Investment Corporation	Real Estate
Buckingham Lockerbie, LLC	Real Estate
Buckingham LP Holdings I, LLC	Real Estate
Buckingham LTIP, LLC	Real Estate
Buckingham Management Michigan, LLC	Real Estate
Buckingham Management, LLC	Real Estate
Buckingham Marketplace, LLC	Real Estate
Buckingham Meridian, LLC	Real Estate
Buckingham Mohawk, LLC	Real Estate
Buckingham Monon, LLC	Real Estate
Buckingham MR, LLC	Real Estate
Buckingham Multifamily Fund 2, LP	Real Estate
Buckingham Multifamily Fund Feeder I LP, LLC	Real Estate
Buckingham Multifamily Fund I GP, LLC	Real Estate
Buckingham Multifamily Fund I REIT Manager, LLC	Real Estate
Buckingham Multifamily Fund I REIT, LLC	Real Estate
Buckingham Multifamily Fund I, LP	Real Estate
Buckingham Multifamily Fund II GP, LLC	Real Estate
Buckingham Multifamily Fund II Limited Partners, LLC	Real Estate
Buckingham Multifamily Fund II REIT Manager, LLC	Real Estate
Buckingham Multifamily Fund II REIT, LLC	Real Estate
Buckingham Multifamily Fund II, LP	Real Estate
Buckingham NOS Asset Manager, LLC	Operations
Buckingham Partners Holdings, LLC	Operations
Buckingham Partners, LLC (fka Buckingham Capital Management)	Operations
Buckingham Plaza, LLC	Real Estate
Buckingham POM Land, LLC	Real Estate
Buckingham Properties II, LLC (fka Buckingham Inland Holdings, LLC)	Real Estate
Buckingham Properties, Inc.	Real Estate
Buckingham Properties, LLC	Real Estate
Buckingham Property Group, LLC	Real Estate
Buckingham Property Holdings, LLC	Real Estate



Buckingham PRP Partners, LLC	Real Estate
Buckingham QR Developer, LLC	Real Estate
Buckingham QR II, LLC	Real Estate
Buckingham QR Manager, LLC	Real Estate
Buckingham QR, LLC	Real Estate
Buckingham Realty and Development Corporation	Real Estate
Buckingham Southport, LLC	Real Estate
Buckingham Special Asset Management, LLC	Operations
Buckingham Springhurst, LLC	Real Estate
Buckingham Summit, LLC	Insurance
Buckingham UE, LLC	Real Estate
Buckingham Urban HUD, LLC	Real Estate
Buckingham Urban Properties, LLC	Real Estate
Buckingham Ventures, LLC	Real Estate
BW Carmel, LLC	Real Estate
BWZ Oak and Ford Partners, LLC	Real Estate
BZ Land Partners, LLC	Real Estate
Carmel Corner Holdings, LLC	Real Estate
Carmel Corner Project Company, LLC	Real Estate
Carmel Corner Project Partners, LLC	Real Estate
Carmel Midtown Project Partners, LLC	Real Estate
Carvel Housing Partners II, LLC	Real Estate
Carvel Housing Partners, LLC	Real Estate
CC Lending Company	Real Estate
CFF Crossroads GP, LLC	Real Estate
CFF Hardwick GP, LLC	Real Estate
CFF Lafayette GP, LLC	Real Estate
CFF White House GP, LLC	Real Estate
Chambers Partners, LP	Real Estate
Champion Farms Holdco, LLC	Real Estate
CSU Housing, LLC	Real Estate
Fall Creek Housing Partners, LLC	Real Estate
Fieldstone Holdco, LLC	Real Estate
Fosters Pershing GP, LLC	Real Estate
Foundry Holdings II, LLC	Real Estate
Foundry Housing Partners II, LLC	Real Estate
Foundry Housing Partners, LLC	Real Estate
Foundry II Garage Partners, Inc.	Real Estate
Georgia Penn Partners, LLC	Real Estate
Glenwood Commercial Partners I, LLC	Real Estate
Glenwood Commercial Partners II, LLC	Real Estate
Glenwood Housing Partners I, LLC	Real Estate
Glenwood Housing Partners II, LLC	Real Estate
Governor Square Holdco, LLC	Real Estate
Gurnee Housing Associates, L.P.	Real Estate
Harbour Housing Partners, LLC	Real Estate
Janus Lofts Housing Partners, LLC	Real Estate
Lafayette Housing Associates II, L.P.	Real Estate
Lafayette Housing Associates, L.P.	Real Estate
Lafayette Landing, LP	Real Estate
LDX, LLC	Operations
Library Square Development Partners, LLC	Real Estate
Livery Entertainment, LLC	Real Estate
MH Midwest, LLC	Real Estate
Michigan Road Partners, LLC	Real Estate
Millburn Street Partners, LLC	Real Estate
Millwood Housing Partners II, LLC	Real Estate
Millwood Housing Partners III, LLC	Real Estate
Millwood Housing Partners, LLC	Real Estate
Mohawk Holdings, LLC	Real Estate
Mohawk WB II, LLC	Real Estate
Mohawk WB, LLC	Real Estate
Monon I MBIMB, LLC	Real Estate
Monon II MBIMB, LLC	Real Estate
Mosaic at Levis Commons II Holdco, LLC	Real Estate
Mosaic at Levis Commons II, LLC	Real Estate
Mosaic at Levis Commons III Holdco, LLC	Real Estate
Mosaic at Levis Commons III, LLC	Real Estate
Northlake Housing Partners, LLC	Real Estate
NOS Commercial Partners, LLC	Real Estate

NOS Holdings II, LLC	Real Estate
NOS Holdings, LLC	Real Estate
NOS Hotel Partners, LLC	Real Estate
NOS Housing Partners, LLC	Real Estate
NOS Innovation Partners II, LLC	Real Estate
NOS Innovation Partners, LLC	Real Estate
NOS NGP, LLC	Real Estate
NOS Pipe Partners Holdco, LLC	Real Estate
NOS Pipe Partners, LLC	Real Estate
NOS Preferred Equity Investor, LLC	Real Estate
NOS SGP, LLC	Real Estate
NOS South Park Partners, LLC	Real Estate
NOS Suites Partners, LLC	Real Estate
NOS TBR Holdings, LLC	Real Estate
NOS TBR, LLC	Real Estate
NOS Virginia Partners, LLC	Real Estate
NOS Wellness Partners SF, LLC	Real Estate
NOS Wellness Partners, LLC	Real Estate
NPC 359 W 20th St. Partners, LLC	Real Estate
NPC Acquisitions, LLC	Investments
NPC Leasing, LLC	Investments
NPC MPG Air, LLC	Transportation
NPC NOS, LLC	Real Estate
Oakley Housing Partners, LLC	Real Estate
OTR Project Investors Holdco, LLC	Real Estate
OTR Project Investors, LLC	Real Estate
OTR Project Partners, LLC	Real Estate
Peoria Housing Associates, L.P.	Real Estate
Pershing Housing Partners, LLC	Real Estate
Pershing Partners, LLC	Real Estate
PM Parking, LLC	Real Estate
PRFP Project Partners II, LLC	Real Estate
PRFP Project Partners, LLC	Real Estate
Providence Holdco, LLC	Real Estate
Providence HUD, LLC	Real Estate
Reserve Holdco, LLC	Real Estate
RL Magnolia Altitude Sub 1, LLC	Real Estate
RL Magnolia Altitude Sub 2, LLC	Real Estate
Rosemont Holdco, LLC	Real Estate
SCP 2009-C34-044, LLC	Real Estate
Shady Oak Acquisition, LLC	Real Estate
Shady Oak Partners, LLC	Real Estate
Shiloh Crossing Partners II, LLC	Real Estate
SP One II Holdco, LLC	Real Estate
SP One II, LLC	Real Estate
Spring Mill Holdco, LLC	Real Estate
Springhurst Housing Partners LLC	Real Estate
Tech Park Partners, LLC	Real Estate
Terre Haute Housing Associates, L.P.	Real Estate
Triana Housing Partners, LLC	Real Estate
VSM Partners, LLC	Real Estate
VU BH Investors II, LLC	Real Estate
VU BH Investors, LLC	Real Estate
VU2013 Developer, LLC	Real Estate
VU2013 Garage, LLC	Real Estate
VU2013 Hotel, LLC	Real Estate
VU2013 Residential, LLC	Real Estate
VU2013 Retail, LLC	Real Estate
VU2013 RRHG Manager, LLC	Real Estate
VU2013 RRHG, LLC	Real Estate
VU2013, LLC	Real Estate
VWCSU, LLC	Real Estate
Whetstone Holdco, LLC	Real Estate
Whetstone Partners I Holdco, LLC	Real Estate
Whetstone Partners I, LLC	Real Estate
Whetstone Partners II Holdco, LLC	Real Estate
Whetstone Partners II, LLC	Real Estate
Woodbridge LVL Holdco, LLC	Real Estate
Woodbridge LVL Partners, LLC	Real Estate
Woodland Housing Partners, LLC	Real Estate



# Exhibit C

Description	Symbol
BANK OF AMERICA, NA RASP	BAXX
BLF TREASURY TRUST	TTTTX

Description	Symbol
ADVNC'D MICRO D INC	AMD
ALIBABA GROUP HOLDING LT	BABA
AMAZON COM INC COM	AMZN
APPLE INC	AAPL
AT&T INC	T
BAIDU INC SPON ADR	BIDU
CÉLANESE CORP DEL SER A	CE
CÉRÉS PWR HDGS PLC UNSP ADR	CRPHY
CHEVRON CORP	CVX
CISCO SYSTEMS INC COM	CSO
COCA COLA COM	KO
COMCAST CORP NEW CL A	CMCSA
CONSUMER DISCRETIONARY SPDR	XLY
ELI LILLY & CO	LLY
FIRST TRUST CLOUD COMPUTING ETF	SKYY
FIRST TRUST DOW JONES INTERNET INDEX FUND	FDN
GE HEALTHCARE TECHNOLOGIES INC SHS	GEHC
GENERAC HDGS INC	GNRC
GENERAL ELEC CO REG SHS	GE
GOLDMAN SACHS GROUP INC	GS
HEALTH CARE SELECT SPDR	XLV
ISHARES BIOTECHNOLOGY ETF	IBB
ISHARES CORE S&P 500 ETF	IVV
ISHARES IBOXX \$ INVT GRADE CORP BD	IGD
ISHARES NATIONAL MUNI BOND ETF	MUB
ISHARES RS 2000 GROWTH	IWO
ISHARES RUSSELL 3000 GROWTH	IWF
ISHARES RUSSELL 3000 VALUE	IWD
ISHARES TIPS BOND ETF	TIP
JOHNSON AND JOHNSON COM	JNJ
JPMORGAN CHASE & CO	JPM
KENVUE INC	KVUE
MASCO CORP	MAS
MATERIALS SELECT SECTOR SPDR FUND	XLB
MEIKESON CORPORATION COM	MCR
MERCHTS BACSHS N ENGLD	MBIN
MERCK AND CO INC SHS	MRK
META PLATFORMS INC CLASS A COMMON STOCK	META
MICROSOFT CORP	MSFT
MIND MEDICINE MINIMAL INC	MIND
NVIDIA	NVDA
NVR INC COM	NVR
OVIC DENTAL PYTE FOND CAL	OVY
PICTON INTERACTIVE INC CL A	PTON
PROCTER & GAMBLE CO	PG
PROSAPES ULTRASOUND EUR	EUO
REALTOR'S SELECT FIFTEEN ADR PD SHS	XIRE
SAFE STORE INC	CRM

Description	Symbol
SECTOR SPDR CONSMRS STPL	XLP
SECTOR SPDR INDUSTRIAL	XLI
SECTOR SPDR UTILITIES	XLU
SPDR NUVEEN BLMBRG SHORT TERM MUNI BOND ETF	SHM
SPDR PORTFOLIO SHORT TER TREASURY ETF	SPTS
SPDR S&P INSURANCE ETF	KIE
SPDR S&P 500 ETF TRUST	SPY
SPDR US FINANCIAL SECTOR ETF	XLF
TORONTO DOMINION BANK	TD
TRAVELERS COS INC	TRV
VANGUARD COMMUNICATION SERVICES ETF	VOX
VANGUARD CONSUMER STAPLES ETF	VDC
VANGUARD DIVIDEND APPRECIATION ETF	VIG
VANGUARD FINANCIALS ETF	VFH
VANGUARD INDUSTRIAL ETF	VIS
VANGUARD INFORMATION TECH ETF	VGT
VANGUARD MATERIALS ETF	VAW
VANGUARD SHORT TERM BOND	BSV
VERIZON COMMUNICATNS COM	VZ
VICI PPTYS INC	VICI

Description	Symbol
ABRDN ULTRASHORT MUNI INCOME FUND CL INSTL	ATOIX
BLACKROCK SHORT-TERM MUNICIPAL FUND INSTL	MALMX
DOUBLELINE TOTAL RETURN BOND FUND CL I	DBLTX
FEDERATED HERMES ULTRA SHORT BOND FD CL IS	FULIX
LOOMIS SAYLES CORE PLUS BOND FD CL Y	NERYX
LORD ABBETT SHORT DURATION INCOME FD CL I	LLDYX
NUVEEN HIGH YIELD MUNI BOND FD CL I	NHMRX
TCW CORE FIXED INCOME I SHARE	TGCFX

Description	Symbol
MERCHANTS BANCORP NEW MONEY SER A VAR%	MBINP