

**COVER PAGE**

**A PUBLIC DOCUMENT**

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)  
Juelsgaard Stephen G.

**1. Office, Agency, or Court**

Agency Name (Do not use acronyms)  
California Institute for Regenerative Medicine  
Division, Board, Department, District, if applicable Your Position  
Independent Citizens Oversight Committee Member

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: \_\_\_\_\_ Position: \_\_\_\_\_

**2. Jurisdiction of Office (Check at least one box)**

State  Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)  
 Multi-County \_\_\_\_\_  County of \_\_\_\_\_  
 City of \_\_\_\_\_  Other \_\_\_\_\_

**3. Type of Statement (Check at least one box)**

**Annual:** The period covered is January 1, 2019, through December 31, 2019.  
-or- The period covered is \_\_\_\_\_, through December 31, 2019.  
 **Assuming Office:** Date assumed \_\_\_\_\_  
 **Candidate:** Date of Election \_\_\_\_\_ and office sought, if different than Part 1: \_\_\_\_\_  
 **Leaving Office:** Date Left \_\_\_\_\_ (Check one circle.)  
 The period covered is January 1, 2019, through the date of leaving office.  
-or-  
 The period covered is \_\_\_\_\_, through the date of leaving office.

**4. Schedule Summary (must complete) ► Total number of pages including this cover page: 37**

**Schedules attached**

**Schedule A-1 - Investments** – schedule attached  **Schedule C - Income, Loans, & Business Positions** – schedule attached  
 **Schedule A-2 - Investments** – schedule attached  **Schedule D - Income – Gifts** – schedule attached  
 **Schedule B - Real Property** – schedule attached  **Schedule E - Income – Gifts – Travel Payments** – schedule attached

-or-  **None - No reportable interests on any schedule**

**5. Verification**

MAILING ADDRESS STREET CITY STATE ZIP CODE  
(Business or Agency Address Recommended - Public Document)  
1999 Harrison St., Ste. 1650 Oakland CA 94612  
DAYTIME TELEPHONE NUMBER EMAIL ADDRESS  
( 510 ) 340-9108 stevejue@hotmail.com

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed March 26, 2020  
(month, day, year)

Signature Stephen Juelsgaard  
(File the originally signed paper statement with your filing official.)

# SCHEDULE A-1 Investments

## Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

*Investments must be itemized.*

*Do not attach brokerage or financial statements.*

Name

Stephen Juelsgaard

▶ **NAME OF BUSINESS ENTITY**  
Starwood Opportunity Fund VIII LP

**GENERAL DESCRIPTION OF THIS BUSINESS**  
Real Estate Investing

**FAIR MARKET VALUE**  
 \$2,000 - \$10,000      \$10,001 - \$100,000  
 \$100,001 - \$1,000,000      Over \$1,000,000

**NATURE OF INVESTMENT**  
 Stock      Other \_\_\_\_\_ (Describe)  
 Partnership      Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

**IF APPLICABLE, LIST DATE:**  
 \_\_\_\_/\_\_\_\_/19     \_\_\_\_/\_\_\_\_/19  
 ACQUIRED                  DISPOSED

▶ **NAME OF BUSINESS ENTITY**  
Starwood Opportunity Fund IX LP

**GENERAL DESCRIPTION OF THIS BUSINESS**  
Real Estate Investing

**FAIR MARKET VALUE**  
 \$2,000 - \$10,000      \$10,001 - \$100,000  
 \$100,001 - \$1,000,000      Over \$1,000,000

**NATURE OF INVESTMENT**  
 Stock      Other \_\_\_\_\_ (Describe)  
 Partnership      Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

**IF APPLICABLE, LIST DATE:**  
 \_\_\_\_/\_\_\_\_/19     \_\_\_\_/\_\_\_\_/19  
 ACQUIRED                  DISPOSED

▶ **NAME OF BUSINESS ENTITY**  
GSO Capital Solutions Fund LP

**GENERAL DESCRIPTION OF THIS BUSINESS**  
Business Lending

**FAIR MARKET VALUE**  
 \$2,000 - \$10,000      \$10,001 - \$100,000  
 \$100,001 - \$1,000,000      Over \$1,000,000

**NATURE OF INVESTMENT**  
 Stock      Other \_\_\_\_\_ (Describe)  
 Partnership      Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

**IF APPLICABLE, LIST DATE:**  
 \_\_\_\_/\_\_\_\_/19     \_\_\_\_/\_\_\_\_/19  
 ACQUIRED                  DISPOSED

▶ **NAME OF BUSINESS ENTITY**  
GSO Capital Solutions II LP

**GENERAL DESCRIPTION OF THIS BUSINESS**  
Business Lending

**FAIR MARKET VALUE**  
 \$2,000 - \$10,000      \$10,001 - \$100,000  
 \$100,001 - \$1,000,000      Over \$1,000,000

**NATURE OF INVESTMENT**  
 Stock      Other \_\_\_\_\_ (Describe)  
 Partnership      Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

**IF APPLICABLE, LIST DATE:**  
 \_\_\_\_/\_\_\_\_/19     \_\_\_\_/\_\_\_\_/19  
 ACQUIRED                  DISPOSED

▶ **NAME OF BUSINESS ENTITY**  
SFC Riverview Ranch Investors LP

**GENERAL DESCRIPTION OF THIS BUSINESS**  
Apartment Ownership

**FAIR MARKET VALUE**  
 \$2,000 - \$10,000      \$10,001 - \$100,000  
 \$100,001 - \$1,000,000      Over \$1,000,000

**NATURE OF INVESTMENT**  
 Stock      Other \_\_\_\_\_ (Describe)  
 Partnership      Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

**IF APPLICABLE, LIST DATE:**  
 \_\_\_\_/\_\_\_\_/19     \_\_\_\_/\_\_\_\_/19  
 ACQUIRED                  DISPOSED

▶ **NAME OF BUSINESS ENTITY**  
SFC Park Knoll Investors LP

**GENERAL DESCRIPTION OF THIS BUSINESS**  
Apartment Ownership

**FAIR MARKET VALUE**  
 \$2,000 - \$10,000      \$10,001 - \$100,000  
 \$100,001 - \$1,000,000      Over \$1,000,000

**NATURE OF INVESTMENT**  
 Stock      Other \_\_\_\_\_ (Describe)  
 Partnership      Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

**IF APPLICABLE, LIST DATE:**  
 \_\_\_\_/\_\_\_\_/19     \_\_\_\_/\_\_\_\_/19  
 ACQUIRED                  DISPOSED

Comments: \_\_\_\_\_

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

Name

Stephen Juelsgaard

NAME OF BUSINESS ENTITY: SFC Eastlake Investors LP
GENERAL DESCRIPTION OF THIS BUSINESS: Apartment Ownership
FAIR MARKET VALUE: \$10,001 - \$100,000
NATURE OF INVESTMENT: Partnership

NAME OF BUSINESS ENTITY: SFC Stonegate Village Investors LP
GENERAL DESCRIPTION OF THIS BUSINESS: Apartment Ownership
FAIR MARKET VALUE: \$10,001 - \$100,000
NATURE OF INVESTMENT: Partnership

NAME OF BUSINESS ENTITY: HPS Core Senior Lending Fund LP
GENERAL DESCRIPTION OF THIS BUSINESS: Business Lending
FAIR MARKET VALUE: \$100,001 - \$1,000,000
NATURE OF INVESTMENT: Partnership

NAME OF BUSINESS ENTITY: North River Partners LP
GENERAL DESCRIPTION OF THIS BUSINESS: Business Investing Hedge Fund
FAIR MARKET VALUE: \$100,001 - \$1,000,000
NATURE OF INVESTMENT: Partnership

NAME OF BUSINESS ENTITY: FT Ventures III LP
GENERAL DESCRIPTION OF THIS BUSINESS: Financial Services Investing
FAIR MARKET VALUE: \$10,001 - \$100,000
NATURE OF INVESTMENT: Partnership

NAME OF BUSINESS ENTITY: FT Ventures IV LP
GENERAL DESCRIPTION OF THIS BUSINESS: Financial Services Investing
FAIR MARKET VALUE: \$100,001 - \$1,000,000
NATURE OF INVESTMENT: Partnership

Comments:

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

Name

Stephen Juelsgaard

NAME OF BUSINESS ENTITY  
Avista Capital Opportunities LP

GENERAL DESCRIPTION OF THIS BUSINESS  
Private Equity Investing

FAIR MARKET VALUE  
 \$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT  
 Stock       Other \_\_\_\_\_ (Describe)  
 Partnership       Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:  
 \_\_\_\_\_/\_\_\_\_\_/19      \_\_\_\_\_/\_\_\_\_\_/19  
 ACQUIRED                      DISPOSED

NAME OF BUSINESS ENTITY  
Duff and Phelps Onshore Feeder Fund IV LP

GENERAL DESCRIPTION OF THIS BUSINESS  
Private Equity Investing

FAIR MARKET VALUE  
 \$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT  
 Stock       Other \_\_\_\_\_ (Describe)  
 Partnership       Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:  
 \_\_\_\_\_/\_\_\_\_\_/19      \_\_\_\_\_/\_\_\_\_\_/19  
 ACQUIRED                      DISPOSED

NAME OF BUSINESS ENTITY  
Hadley Harbor Pre-IPO Onshore Feeder Fund L

GENERAL DESCRIPTION OF THIS BUSINESS  
Investing in pre-IPO companies

FAIR MARKET VALUE  
 \$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT  
 Stock       Other \_\_\_\_\_ (Describe)  
 Partnership       Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:  
 \_\_\_\_\_/\_\_\_\_\_/19      \_\_\_\_\_/\_\_\_\_\_/19  
 ACQUIRED                      DISPOSED

NAME OF BUSINESS ENTITY  
Private Equity Opportunities Onshore Feeder Fu

GENERAL DESCRIPTION OF THIS BUSINESS  
Private Equity Investing

FAIR MARKET VALUE  
 \$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT  
 Stock       Other \_\_\_\_\_ (Describe)  
 Partnership       Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:  
 \_\_\_\_\_/\_\_\_\_\_/19      \_\_\_\_\_/\_\_\_\_\_/19  
 ACQUIRED                      DISPOSED

NAME OF BUSINESS ENTITY  
TRG Growth Partnership II LP

GENERAL DESCRIPTION OF THIS BUSINESS  
Private Equity Investing

FAIR MARKET VALUE  
 \$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT  
 Stock       Other \_\_\_\_\_ (Describe)  
 Partnership       Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:  
 \_\_\_\_\_/\_\_\_\_\_/19      \_\_\_\_\_/\_\_\_\_\_/19  
 ACQUIRED                      DISPOSED

NAME OF BUSINESS ENTITY  
CRP Opportunities Fund LP

GENERAL DESCRIPTION OF THIS BUSINESS  
Real Estate Investing

FAIR MARKET VALUE  
 \$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT  
 Stock       Other \_\_\_\_\_ (Describe)  
 Partnership       Income Received of \$0 - \$499  
     Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:  
 \_\_\_\_\_/\_\_\_\_\_/19      \_\_\_\_\_/\_\_\_\_\_/19  
 ACQUIRED                      DISPOSED

Comments:

Schedule A-1  
Investments

Name:  
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
3M COMPANY	Industrials	\$10,000-\$100,000	Common Stock
ABBOTT LABORATORIES	Health Care	\$10,000-\$100,000	Common Stock
ABBVIE INC	Health Care	\$10,000-\$100,000	Common Stock
ADOBE INC	Information Technology	\$2,000-\$10,000	Common Stock
AFLAC INC	Financials	\$2,000-\$10,000	Common Stock
AIR PRODUCTS & CHEMICALS INC	Materials	\$2,000-\$10,000	Common Stock
ALLEGION PLC	Industrials	\$2,000-\$10,000	Common Stock
ALLERGAN PLC	Health Care	\$2,000-\$10,000	Common Stock
ALLSTATE CORP	Financials	\$10,000-\$100,000	Common Stock
ALPHABET INC CLASS A	Information Technology	\$10,000-\$100,000	Common Stock
ALPHABET INC CLASS C	Information Technology	\$10,000-\$100,000	Common Stock
ALTRIA GROUP INC	Consumer Staples	\$10,000-\$100,000	Common Stock
AMAZON COM INC	Information Technology	\$10,000-\$100,000	Common Stock
AMERICAN ELECTRIC POWER CO INC	Utilities	\$10,000-\$100,000	Common Stock
AMERICAN TOWER CORP	Real Estate	\$10,000-\$100,000	Common Stock
AMERIPRISE FINANCIAL INC	Financials	\$2,000-\$10,000	Common Stock
AMERISOURCEBERGEN CORP	Health Care	\$2,000-\$10,000	Common Stock
AMERRA Agri Fund II, L.P.	Private Equity	\$100,000-\$1,000,000	Partnership
AMGEN INC	Health Care	\$10,000-\$100,000	Common Stock
AMPHENOL CORP CLASS A	Industrials	\$2,000-\$10,000	Common Stock
ANALOG DEVICES INC	Information Technology	\$2,000-\$10,000	Common Stock
ANTHEM INC	Health Care	\$10,000-\$100,000	Common Stock
AON PLC	Financials	\$10,000-\$100,000	Common Stock
APPLE INC	Information Technology	\$100,000-\$1,000,000	Common Stock

Schedule A-1  
Investments

Name:  
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
APPLIED MATERIALS INC	Information Technology	\$10,000-\$100,000	Common Stock
APTIV PLC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
Asia Enterprise III Ons LP B	Private Equity	\$10,000-\$100,000	Partnership
AT&T INC	Communication	\$10,000-\$100,000	Common Stock
AUTODESK INC	Information Technology	\$2,000-\$10,000	Common Stock
AUTOMATIC DATA PROCESSING INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
AUTOZONE INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
Avista II LP Ons 4C B	Private Equity	\$100,000-\$1,000,000	Partnership
BALL CORP	Industrials	\$10,000-\$100,000	Common Stock
BANK OF AMERICA CORP	Financials	\$10,000-\$100,000	Common Stock
BANK OF NEW YORK MELLON CORP/	Financials	\$10,000-\$100,000	Common Stock
BAXTER INTL INC	Health Care	\$10,000-\$100,000	Common Stock
BECTON DICKINSON AND CO	Health Care	\$2,000-\$10,000	Common Stock
BERKSHIRE HATHAWAY INC CL B	Financials	\$10,000-\$100,000	Common Stock
BIOGEN INC	Health Care	\$10,000-\$100,000	Common Stock
BOEING CO	Industrials	\$10,000-\$100,000	Common Stock
BOOKING HOLDINGS INC	Information Technology	\$10,000-\$100,000	Common Stock
BOSTON SCIENTIFIC CORP	Health Care	\$10,000-\$100,000	Common Stock
BRISTOL MYERS SQUIBB CO	Health Care	\$10,000-\$100,000	Common Stock
BROADCOM INC	Information Technology	\$2,000-\$10,000	Common Stock
CATERPILLAR INC	Industrials	\$2,000-\$10,000	Common Stock
CERNER CORP	Information Technology	\$10,000-\$100,000	Common Stock
CF INDUSTRIES HOLDINGS INC	Materials	\$2,000-\$10,000	Common Stock
CHARTER COMMUNICATIONS INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
		\$10,000-\$100,000	

Schedule A-1  
Investments

Name:  
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
CHEVRON CORP	Energy	\$10,000-\$100,000	Common Stock
CIGNA CORP	Health Care	\$10,000-\$100,000	Common Stock
CINTAS CORP	Consumer Discretionary	\$2,000-\$10,000	Common Stock
CISCO SYS INC	Information Technology	\$10,000-\$100,000	Common Stock
CLOROX COMPANY DE	Consumer Staples	\$2,000-\$10,000	Common Stock
CME GROUP INC	Financials	\$10,000-\$100,000	Common Stock
CMMO Crestline Onshore Feeder Fd LP Sr	Private Equity	\$10,000-\$100,000	Partnership
COCA-COLA CO	Consumer Staples	\$2,000-\$10,000	Common Stock
COGNIZANT TECH SOLUTIONS CL A	Information Technology	\$2,000-\$10,000	Common Stock
COMCAST CORP CL A	Consumer Discretionary	\$10,000-\$100,000	Common Stock
COMERICA INC	Financials	\$10,000-\$100,000	Common Stock
CONCHO RESOURCES INC	Energy	\$2,000-\$10,000	Common Stock
CONOCOPHILLIPS	Energy	\$2,000-\$10,000	Common Stock
CONSTELLATION BRANDS INC	Consumer Staples	\$10,000-\$100,000	Common Stock
CORTEVA INC	Health Care	\$2,000-\$10,000	Common Stock
COSTCO WHOLESALE CORP NEW	Consumer Discretionary	\$10,000-\$100,000	Common Stock
COTY INC	Consumer Staples	\$2,000-\$10,000	Common Stock
CROWN CASTLE INTERNATIONAL	Real Estate	\$2,000-\$10,000	Common Stock
CRP Opp Onshr LP B	Real Estate	\$10,000-\$100,000	Real Estate
CVS HEALTH CORP	Health Care	\$2,000-\$10,000	Common Stock
DANAHER CORP	Health Care	\$10,000-\$100,000	Common Stock
DGP IV Ownership Onshore Fdr Fd LP Ser	Private Equity	\$10,000-\$100,000	Partnership
DOW INC	Materials	\$2,000-\$10,000	Common Stock
DUPONT DE NEMOURS INC	Materials	\$2,000-\$10,000	Common Stock

Schedule A-1  
Investments

Name:  
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
EASTMAN CHEMICAL CO	Materials	\$2,000-\$10,000	Common Stock
EATON CORP PLC	Industrials	\$2,000-\$10,000	Common Stock
ECOLAB INC	Materials	\$10,000-\$100,000	Common Stock
EDISON INTERNATIONAL	Utilities	\$10,000-\$100,000	Common Stock
ELI LILLY & CO	Health Care	\$10,000-\$100,000	Common Stock
EMERSON ELECTRIC CO	Industrials	\$2,000-\$10,000	Common Stock
EOG RESOURCES INC	Energy	\$2,000-\$10,000	Common Stock
EQUIFAX INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
EXPEDIA GROUP INC	Information Technology	\$2,000-\$10,000	Common Stock
EXXON MOBIL CORP	Energy	\$10,000-\$100,000	Common Stock
FACEBOOK INC - A	Information Technology	\$10,000-\$100,000	Common Stock
FEDEX CORP	Industrials	\$2,000-\$10,000	Common Stock
FIFTH THIRD BANCORP	Financials	\$2,000-\$10,000	Common Stock
FIRST SOLAR INC	Energy	\$2,000-\$10,000	Common Stock
FISERV INC	Information Technology	\$10,000-\$100,000	Common Stock
FORTIVE CORP	Industrials	\$2,000-\$10,000	Common Stock
GILEAD SCIENCES INC	Health Care	\$10,000-\$100,000	Common Stock
GOLDMAN SACHS GROUP INC	Financials	\$2,000-\$10,000	Common Stock
HEALTHPEAK PROPERTIES INC	Real Estate	\$10,000-\$100,000	Common Stock
HESS CORP	Energy	\$2,000-\$10,000	Common Stock
HEWLETT PACKARD ENTERPRISE CO	Information Technology	\$2,000-\$10,000	Common Stock
HH Pre-IPO Onshore Feeder Fd II L.P S B	Private Equity	\$100,000-\$1,000,000	Partnership
HOME DEPOT INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
HONEYWELL INTL INC	Industrials	\$10,000-\$100,000	Common Stock



Schedule A-1  
Investments

Name:  
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
HP INC	Information Technology	\$2,000-\$10,000	Common Stock
ILLINOIS TOOL WORKS INC	Industrials	\$10,000-\$100,000	Common Stock
INGERSOLL-RAND PUBLIC LTD	Industrials	\$10,000-\$100,000	Common Stock
INTEL CORP	Information Technology	\$10,000-\$100,000	Common Stock
INTUIT INC	Information Technology	\$10,000-\$100,000	Common Stock
JOHNSON & JOHNSON	Health Care	\$10,000-\$100,000	Common Stock
JPMORGAN CHASE & CO	Financials	\$10,000-\$100,000	Common Stock
KEYCORP	Financials	\$2,000-\$10,000	Common Stock
KIMBERLY CLARK CORP	Consumer Staples	\$10,000-\$100,000	Common Stock
KINDER MORGAN INC/DE	Energy	\$2,000-\$10,000	Common Stock
KOHL'S CORP	Consumer Discretionary	\$2,000-\$10,000	Common Stock
KROGER CO/THE	Consumer Staples	\$10,000-\$100,000	Common Stock
L3HARRIS TECHNOLOGIES INC	Industrials	\$10,000-\$100,000	Common Stock
LAM RESEARCH CORP	Information Technology	\$10,000-\$100,000	Common Stock
LEIDOS HOLDINGS INC	Information Technology	\$2,000-\$10,000	Common Stock
LINCOLN NATIONAL CORP -IND-	Financials	\$10,000-\$100,000	Common Stock
LOWE'S COS INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
MARATHON OIL CORP	Energy	\$2,000-\$10,000	Common Stock
MARATHON PETROLEUM CORP	Energy	\$2,000-\$10,000	Common Stock
MARRIOTT INTL INC NEW CL A	Consumer Discretionary	\$10,000-\$100,000	Common Stock
MARSH & MCLENNAN COS INC	Financials	\$10,000-\$100,000	Common Stock
MASTERCARD INCORPORATED	Financials	\$10,000-\$100,000	Common Stock
MCDONALD'S CORP	Consumer Discretionary	\$2,000-\$10,000	Common Stock
MEDTRONIC PLC	Health Care	\$2,000-\$10,000	Common Stock

Schedule A-1  
Investments

Name:  
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
MERCK & CO INC NEW	Health Care	\$10,000-\$100,000	Common Stock
MICROSOFT CORP	Information Technology	\$100,000-\$1,000,000	Common Stock
MOLSON COORS BEVERAGE COMPAN	Consumer Staples	\$2,000-\$10,000	Common Stock
MONDELEZ INTERNATIONAL	Consumer Staples	\$10,000-\$100,000	Common Stock
MOODY'S CORP	Consumer Discretionary	\$10,000-\$100,000	Common Stock
NETFLIX INC	Materials	\$2,000-\$10,000	Common Stock
NEXTERA ENERGY INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
NGT II Onshore Feeder Fund L.P. Series B	Private Equity	\$10,000-\$100,000	Partnership
NIKE INC CL B	Utilities	\$10,000-\$100,000	Common Stock
NISOURCE INC	Energy	\$2,000-\$10,000	Common Stock
NOBLE ENERGY INC	Industrials	\$2,000-\$10,000	Common Stock
NORFOLK SOUTHERN CORP	Financials	\$2,000-\$10,000	Common Stock
North River Partners, L.P. Brokerage Int	Hedge Funds	\$100,000-\$1,000,000	Hedge Funds
NORTHROP GRUMMAN CORP	Information Technology	\$10,000-\$100,000	Common Stock
NRG ENERGY INC	Information Technology	\$10,000-\$100,000	Common Stock
NVIDIA CORP	Consumer Discretionary	\$10,000-\$100,000	Common Stock
ONE GAS INC	Energy	\$2,000-\$10,000	Common Stock
O'REILLY AUTOMOTIVE INC	Information Technology	\$2,000-\$10,000	Common Stock
Partners RE Second 09 A USD	Real Estate	\$100,000-\$1,000,000	Real Estate
PAYPAL HOLDINGS INC	Consumer Staples	\$2,000-\$10,000	Common Stock
PEPSICO INC	Industrials	\$10,000-\$100,000	Common Stock
PERRIGO CO PLC	Information Technology	\$2,000-\$10,000	Common Stock
PFIZER INC	Consumer Staples	\$10,000-\$100,000	Common Stock
PHILLIPS 66	Energy	\$10,000-\$100,000	Common Stock

Schedule A-1  
Investments

Name:  
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
PPG INDUSTRIES INC	Utilities	\$10,000-\$100,000	Common Stock
Private Equity Opp (PPV) Ons Fd LP CI B	Private Equity	\$100,000-\$1,000,000	Partnership
PRO LOGIS INC	Consumer Staples	\$10,000-\$100,000	Common Stock
PROCTER & GAMBLE CO/THE	Financials	\$10,000-\$100,000	Common Stock
PRUDENTIAL FINANCIAL INC	Utilities	\$2,000-\$10,000	Common Stock
QUALCOMM INC	Health Care	\$2,000-\$10,000	Common Stock
REGIONS FINANCIAL CORP	Industrials	\$10,000-\$100,000	Common Stock
S&P GLOBAL INC	Information Technology	\$10,000-\$100,000	Common Stock
SALESFORCE.COM INC	Energy	\$10,000-\$100,000	Common Stock
SCHWAB CHARLES CORP	Utilities	\$10,000-\$100,000	Common Stock
SEMPRA ENERGY	Real Estate	\$10,000-\$100,000	Common Stock
SOUTHWEST AIRLINES CO	Industrials	\$2,000-\$10,000	Common Stock
STARBUCKS CORP	Financials	\$10,000-\$100,000	Common Stock
STRYKER CORP	Communication	\$2,000-\$10,000	Common Stock
T MOBILE US INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
TARGET CORP	Consumer Discretionary	\$2,000-\$10,000	Common Stock
TEXAS INSTRUMENTS INC	Industrials	\$10,000-\$100,000	Common Stock
TEXTRON INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
TF Capital II Delaware LP A	Private Equity	\$10,000-\$100,000	Partnership
TJX COMPANIES INC NEW	Financials	\$10,000-\$100,000	Common Stock
TRG Gr Pt (Cayman Onshore) II LP B	Private Equity	\$100,000-\$1,000,000	Partnership
TRUIST FINANCIAL CORP	Information Technology	\$10,000-\$100,000	Common Stock
TYSON FOODS INC	Real Estate	\$2,000-\$10,000	Common Stock
UNION PACIFIC CORP	Industrials	\$10,000-\$100,000	Common Stock

Schedule A-1  
Investments

Name:  
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
UNITEDHEALTH GROUP INC	Financials	\$10,000-\$100,000	Common Stock
VALERO ENERGY CORP-NEW	Real Estate	\$10,000-\$100,000	Common Stock
VERIZON COMMUNICATIONS	Health Care	\$10,000-\$100,000	Common Stock
VISA INC COM CL A	Real Estate	\$10,000-\$100,000	Common Stock
WALGREENS BOOTS ALLIANCE INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
WALMART INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
WALT DISNEY CO	Industrials	\$10,000-\$100,000	Common Stock
WELLS FARGO & CO NEW	Real Estate	\$10,000-\$100,000	Common Stock
WELLTOWER INC	Other	\$2,000-\$10,000	Common Stock
WHIRLPOOL CORP	Consumer Discretionary	\$2,000-\$10,000	Common Stock

Schedule A-1  
Investments

Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	Market Value	Nature of Investment
3M CO	Industrials	\$0-\$10,000	Common Stock
ABBOTT LABORATORIES	Healthcare	\$0-\$10,000	Common Stock
ACCENTURE PLC	Information Technology	\$10,000-\$100,000	Common Stock
ACTIVISION BLIZZARD INC	Telecommunications Services	\$0-\$10,000	Common Stock
ADOBE SYSTEMS INC	Information Technology	\$0-\$10,000	Common Stock
ADVANCED AUTO PARTS INC	Consumer Discretionary	\$0-\$10,000	Common Stock
ADVANCED MICRO DEVICES INC	Information Technology	\$0-\$10,000	Common Stock
AIR PRODUCTS & CHEMICALS INC	Materials	\$0-\$10,000	Common Stock
ALEXANDRIA REAL ESTATE EQUITIES, INC	Real Estate	\$0-\$10,000	Common Stock
ALEXION PHARMACEUTICALS INC	Healthcare	\$0-\$10,000	Common Stock
ALIGN TECHNOLOGY INC	Healthcare	\$0-\$10,000	Common Stock
ALLERGAN PLC	Healthcare	\$0-\$10,000	Common Stock
ALPHABET, INC.	Telecommunications Services	\$10,000-\$100,000	Common Stock
ALPHABET, INC.	Telecommunications Services	\$10,000-\$100,000	Common Stock
ALTRIA GROUP INC	Consumer Staples	\$0-\$10,000	Common Stock
AMAZON.COM INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
AMERICAN EXPRESS COMPANY	Financials	\$10,000-\$100,000	Common Stock
AMGEN INC	Healthcare	\$10,000-\$100,000	Common Stock
AMPHENOL CORP NEW CL A	Information Technology	\$0-\$10,000	Common Stock
ANALOG DEVICES INC	Information Technology	\$0-\$10,000	Common Stock
ANTHEM INC.	Healthcare	\$0-\$10,000	Common Stock
APARTMENT INVESTMENT & MANAGEM	Real Estate	\$0-\$10,000	Common Stock
APPLE INC	Information Technology	\$10,000-\$100,000	Common Stock
APPLIED MATERIALS INC	Information Technology	\$0-\$10,000	Common Stock
ARCHER DANIELS MIDLAND CO	Consumer Staples	\$0-\$10,000	Common Stock
ARCONIC INC	Industrials	\$0-\$10,000	Common Stock
AUTOMATIC DATA PROCESSING INC	Information Technology	\$10,000-\$100,000	Common Stock
AUTOZONE INC	Consumer Discretionary	\$0-\$10,000	Common Stock
BAKER HUGHES	Energy	\$0-\$10,000	Common Stock
BANK OF AMERICA CORPORATION	Financials	\$10,000-\$100,000	Common Stock
BAXTER INTERNATIONAL INC	Healthcare	\$0-\$10,000	Common Stock
BECTON DICKINSON & CO	Healthcare	\$0-\$10,000	Common Stock
BERKSHIRE HATHAWAY INC DEL CL B	Financials	\$10,000-\$100,000	Common Stock
BEST BUY INC	Consumer Discretionary	\$0-\$10,000	Common Stock
BIAGEN IDEC INC	Healthcare	\$0-\$10,000	Common Stock
BORG-WARNER AUTOMOTIVE INC	Consumer Discretionary	\$0-\$10,000	Common Stock
BOSTON SCIENTIFIC CORPORATION	Healthcare	\$0-\$10,000	Common Stock
BRISTOL-MYERS SQUIBB COMPANY	Healthcare	\$0-\$10,000	Common Stock
BROADCOM INC	Information Technology	\$0-\$10,000	Common Stock
C D W CORPORATION	Information Technology	\$0-\$10,000	Common Stock
C S X CORP	Industrials	\$0-\$10,000	Common Stock
CARDINAL HEALTH INC	Healthcare	\$0-\$10,000	Common Stock
CARMAX INC	Consumer Discretionary	\$0-\$10,000	Common Stock
CARNIVAL CORP	Consumer Discretionary	\$0-\$10,000	Common Stock
CATERPILLAR INC	Industrials	\$0-\$10,000	Common Stock
CBOE HOLDINGS INC	Financials	\$0-\$10,000	Common Stock
CELANESE CORP	Materials	\$0-\$10,000	Common Stock
CENTENE CORP DEL	Healthcare	\$0-\$10,000	Common Stock

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CENTURYTEL INC	Telecommunications Services	\$0-\$10,000	Common Stock
CHARTER COMMUNICATINS, INC.	Telecommunications Services	\$10,000-\$100,000	Common Stock
CHEVRON CORPORATION	Energy	\$10,000-\$100,000	Common Stock
CHUBB LIMITED	Financials	\$0-\$10,000	Common Stock
CHURCH & DWIGHT INC	Consumer Staples	\$0-\$10,000	Common Stock
CIGNA CORPORATION	Healthcare	\$0-\$10,000	Common Stock
CIMAREX ENERGY CO	Energy	\$0-\$10,000	Common Stock
CISCO SYSTEMS INC	Information Technology	\$0-\$10,000	Common Stock
CITIGROUP INC	Financials	\$0-\$10,000	Common Stock
CLOROX CO	Consumer Staples	\$0-\$10,000	Common Stock
COCA - COLA CO	Consumer Staples	\$10,000-\$100,000	Common Stock
CONAGRA INC	Consumer Staples	\$0-\$10,000	Common Stock
CONCHO RESOURCES INC	Energy	\$0-\$10,000	Common Stock
CONOCOPHILLIPS	Energy	\$0-\$10,000	Common Stock
CORTEVA INC	Materials	\$0-\$10,000	Common Stock
CROWN CASTLE INTL CORP NEW	Real Estate	\$0-\$10,000	Common Stock
CUMMINS INC	Industrials	\$0-\$10,000	Common Stock
CVS HEALTH CORPORATION	Healthcare	\$0-\$10,000	Common Stock
D R HORTON INC	Consumer Discretionary	\$0-\$10,000	Common Stock
DANAHER CORP	Healthcare	\$10,000-\$100,000	Common Stock
DARDEN RESTAURANTS INC	Consumer Discretionary	\$0-\$10,000	Common Stock
DEVON ENERGY CORPORATION NEW	Energy	\$0-\$10,000	Common Stock
DISCOVER FINANCIAL SERVICES	Financials	\$10,000-\$100,000	Common Stock
DISCOVERY COMMUNICATIONS INC	Telecommunications Services	\$0-\$10,000	Common Stock
DOLLAR TREE INC	Consumer Discretionary	\$0-\$10,000	Common Stock
DOVER CORP	Industrials	\$0-\$10,000	Common Stock
DOW INC.	Materials	\$0-\$10,000	Common Stock
DUKE ENERGY CORPORATION	Utilities	\$0-\$10,000	Common Stock
DXC TECHNOLOGY CO	Information Technology	\$0-\$10,000	Common Stock
E O G RES INC	Energy	\$0-\$10,000	Common Stock
EASTMAN CHEM CO	Materials	\$0-\$10,000	Common Stock
EATON CORP PLC	Industrials	\$0-\$10,000	Common Stock
EDISON INTERNATIONAL	Utilities	\$0-\$10,000	Common Stock
EDWARDS LIFESCIENCES CORP	Healthcare	\$0-\$10,000	Common Stock
ELECTRONIC ARTS INC	Telecommunications Services	\$0-\$10,000	Common Stock
EMERSON ELECTRIC CO	Industrials	\$0-\$10,000	Common Stock
ESTEE LAUDER COMPANIES CLASS A	Consumer Staples	\$0-\$10,000	Common Stock
EVEREST RE GROUP LTD	Financials	\$0-\$10,000	Common Stock
EXELON CORP	Utilities	\$0-\$10,000	Common Stock
EXPEDIA, INC.	Consumer Discretionary	\$0-\$10,000	Common Stock
EXXON MOBIL CORP	Energy	\$0-\$10,000	Common Stock
F M C CORP	Materials	\$0-\$10,000	Common Stock
FACEBOOK INC.	Telecommunications Services	\$10,000-\$100,000	Common Stock
FIDELITY NATIONAL INFORMATION SERVICES, INC.	Information Technology	\$0-\$10,000	Common Stock
FIRST REPUBLIC BANK	Financials	\$0-\$10,000	Common Stock
FIRSTENERGY CORP	Utilities	\$0-\$10,000	Common Stock
FISERV INC	Information Technology	\$0-\$10,000	Common Stock
FLOWERVE CORPORATION	Industrials	\$0-\$10,000	Common Stock
FORD MOTOR COMPANY	Consumer Discretionary	\$0-\$10,000	Common Stock
FORTIVE CORP.	Industrials	\$0-\$10,000	Common Stock
FORTUNE BRANDS HOME & SECURITY INC	Industrials	\$0-\$10,000	Common Stock
FOX CORP	Telecommunications Services	\$0-\$10,000	Common Stock
FREEMPORT MCMORAN COPPER & GOLD INC	Materials	\$0-\$10,000	Common Stock

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GARMIN LTD	Consumer Discretionary	\$0-\$10,000	Common Stock
GENERAL DYNAMICS CORPORATION	Industrials	\$0-\$10,000	Common Stock
GENERAL MILLS INC	Consumer Staples	\$0-\$10,000	Common Stock
GENUINE PARTS CO	Consumer Discretionary	\$0-\$10,000	Common Stock
GILEAD SCIENCES INC	Healthcare	\$0-\$10,000	Common Stock
GOLDMAN SACHS GROUP INC	Financials	\$0-\$10,000	Common Stock
GRAINGER W W INC	Industrials	\$0-\$10,000	Common Stock
H C A HOLDINGS INC	Healthcare	\$0-\$10,000	Common Stock
HALLIBURTON CO	Energy	\$0-\$10,000	Common Stock
HASBRO INC	Consumer Discretionary	\$0-\$10,000	Common Stock
HCP, INC.	Real Estate	\$0-\$10,000	Common Stock
HILTON WORLDWIDE HOLDINGS INC.	Consumer Discretionary	\$0-\$10,000	Common Stock
HOLOGIC INC	Healthcare	\$0-\$10,000	Common Stock
HOME DEPOT INC	Consumer Discretionary	\$0-\$10,000	Common Stock
HONEYWELL INTL INC	Industrials	\$0-\$10,000	Common Stock
HOST HOTELS & RESORTS INC	Real Estate	\$0-\$10,000	Common Stock
HUMANA INC	Healthcare	\$0-\$10,000	Common Stock
IDEX CORP	Industrials	\$0-\$10,000	Common Stock
IHS MARKIT LTD	Industrials	\$0-\$10,000	Common Stock
ILLUMINA INC	Healthcare	\$0-\$10,000	Common Stock
INCYTE CORPORATION	Healthcare	\$0-\$10,000	Common Stock
INGERSOLL-RAND PLC	Industrials	\$0-\$10,000	Common Stock
INTEL CORP	Information Technology	\$10,000-\$100,000	Common Stock
INTERNATIONAL FLAVORS & FRAGRANCES	Materials	\$0-\$10,000	Common Stock
INTERNATIONAL PAPER CO	Materials	\$0-\$10,000	Common Stock
INTUITIVE SURGICAL INC	Healthcare	\$0-\$10,000	Common Stock
INVESCO LIMITED	Financials	\$0-\$10,000	Common Stock
IRON MOUNTAIN INCORPORATED	Information Technology	\$0-\$10,000	Common Stock
JOHNSON & JOHNSON	Healthcare	\$10,000-\$100,000	Common Stock
JP MORGAN CHASE & CO	Financials	\$10,000-\$100,000	Common Stock
JUNIPER NETWORKS INC	Information Technology	\$0-\$10,000	Common Stock
K L A - TENCOR CORP	Information Technology	\$0-\$10,000	Common Stock
KELLOGG CO	Consumer Staples	\$0-\$10,000	Common Stock
KIMBERLY CLARK CORP	Consumer Staples	\$0-\$10,000	Common Stock
KOHL'S CORP	Consumer Discretionary	\$0-\$10,000	Common Stock
LAM RESH CORP	Information Technology	\$0-\$10,000	Common Stock
LAMB WESTON HOLDINGS, INC.	Consumer Staples	\$0-\$10,000	Common Stock
LAS VEGAS SANDS CORP	Consumer Discretionary	\$0-\$10,000	Common Stock
LEGGETT & PLATT INC	Consumer Discretionary	\$0-\$10,000	Common Stock
LILLY ELI & CO	Healthcare	\$0-\$10,000	Common Stock
LINDE PUBLIC LIMITED COMPANY	Materials	\$0-\$10,000	Common Stock
LOCKHEED MARTIN CORP	Industrials	\$10,000-\$100,000	Common Stock
LOWE'S COMPANIES INC	Consumer Discretionary	\$0-\$10,000	Common Stock
LYONDELLBASELL INDUSTRIES NV	Materials	\$0-\$10,000	Common Stock
M G M MIRAGE	Consumer Discretionary	\$0-\$10,000	Common Stock
MACERICH COMPANY (THE)	Real Estate	\$0-\$10,000	Common Stock
MACY'S INC	Consumer Discretionary	\$0-\$10,000	Common Stock
MARATHON OIL CORP	Energy	\$0-\$10,000	Common Stock
MARKETAXESS HLDGS INC	Financials	\$0-\$10,000	Common Stock
MARRIOTT INTERNATIONAL INC	Consumer Discretionary	\$0-\$10,000	Common Stock
MARTIN MARIETTA MATLS INC	Materials	\$0-\$10,000	Common Stock
MASTERCARD INC	Information Technology	\$0-\$10,000	Common Stock
MCCORMICK & CO INC COM	Consumer Staples	\$0-\$10,000	Common Stock

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MEDTRONIC, PLC	Healthcare	\$0-\$10,000	Common Stock
METLIFE INC	Financials	\$0-\$10,000	Common Stock
MICROSOFT CORPORATION	Information Technology	\$10,000-\$100,000	Common Stock
MID-AMERICA APARTMENT COMMUNITYS INC	Real Estate	\$0-\$10,000	Common Stock
MOHAWK INDS INC	Consumer Discretionary	\$0-\$10,000	Common Stock
MONSTER BEVERAGE CORPORATION	Consumer Staples	\$0-\$10,000	Common Stock
MORGAN STANLEY	Financials	\$0-\$10,000	Common Stock
MOTOROLA SOLUTIONS INC.	Information Technology	\$0-\$10,000	Common Stock
NATIONAL OILWELL VARCO INC.	Energy	\$0-\$10,000	Common Stock
NETFLIX COM INC	Telecommunications Services	\$0-\$10,000	Common Stock
NEWMONT MINING CORP	Materials	\$0-\$10,000	Common Stock
NEXTERA ENERGY INC	Utilities	\$0-\$10,000	Common Stock
NIKE INC CLASS B STOCK	Consumer Discretionary	\$10,000-\$100,000	Common Stock
NISOURCE INC	Utilities	\$0-\$10,000	Common Stock
NOBLE ENERGY INC	Energy	\$0-\$10,000	Common Stock
NORFOLK SOUTHERN CORPORATION	Industrials	\$10,000-\$100,000	Common Stock
NORTHERN TR CORP	Financials	\$0-\$10,000	Common Stock
NORTONLIFELOCK INC	Information Technology	\$0-\$10,000	Common Stock
NORWEGIAN CRUISE LINE HOLDINGS LTD.	Consumer Discretionary	\$0-\$10,000	Common Stock
NUCOR CORP	Materials	\$0-\$10,000	Common Stock
NVIDIA CORP	Information Technology	\$0-\$10,000	Common Stock
OMNICOM GROUP INC	Telecommunications Services	\$0-\$10,000	Common Stock
ONEOK INC	Energy	\$0-\$10,000	Common Stock
O'REILLY AUTOMOTIVE INC	Consumer Discretionary	\$0-\$10,000	Common Stock
P P G INDUSTRIES INC	Materials	\$0-\$10,000	Common Stock
PACCAR INC	Industrials	\$0-\$10,000	Common Stock
PARKER HANNIFIN CORP	Industrials	\$0-\$10,000	Common Stock
PAYPAL HOLDINGS, INC.	Information Technology	\$0-\$10,000	Common Stock
PENTAIR PLC	Industrials	\$0-\$10,000	Common Stock
PEOPLE'S UNITED FINANCIAL IN	Financials	\$0-\$10,000	Common Stock
PEPSICO INC	Consumer Staples	\$0-\$10,000	Common Stock
PFIZER INC	Healthcare	\$10,000-\$100,000	Common Stock
PHILIP MORRIS INTERNATIONAL INC	Consumer Staples	\$10,000-\$100,000	Common Stock
PHILLIPS 66	Energy	\$0-\$10,000	Common Stock
PIONEER NATURAL RESOURCES COMPANY	Energy	\$0-\$10,000	Common Stock
PPL CORP	Utilities	\$0-\$10,000	Common Stock
PROLOGIS, INC.	Real Estate	\$0-\$10,000	Common Stock
PRUDENTIAL FINANCIAL INC	Financials	\$0-\$10,000	Common Stock
PUBLIC STORAGE INC REIT	Real Estate	\$0-\$10,000	Common Stock
Q O R V O INC.	Information Technology	\$0-\$10,000	Common Stock
QUALCOMM INC	Information Technology	\$0-\$10,000	Common Stock
QUANTA SVCS INC	Industrials	\$0-\$10,000	Common Stock
RAYTHEON CO	Industrials	\$0-\$10,000	Common Stock
REGENERON PHARMACEUTICALS INC	Healthcare	\$0-\$10,000	Common Stock
REPUBLIC SVCS INC CL A	Industrials	\$0-\$10,000	Common Stock
ROCKWELL AUTOMATION INC	Industrials	\$0-\$10,000	Common Stock
ROPER INDUSTRIES INC	Industrials	\$0-\$10,000	Common Stock
ROYAL CARIBBEAN CRUISES LTD	Consumer Discretionary	\$0-\$10,000	Common Stock
S & P GLOBAL INC.	Financials	\$10,000-\$100,000	Common Stock
S B A COMMUNICATIONS CORPORATION	Real Estate	\$0-\$10,000	Common Stock
S L GREEN REALTY CORP REIT	Real Estate	\$0-\$10,000	Common Stock
SALESFORCE.COM INC	Information Technology	\$0-\$10,000	Common Stock
SCHEIN HENRY INC	Healthcare	\$0-\$10,000	Common Stock



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SCHWAB CHARLES CORP NEW	Financials	\$0-\$10,000	Common Stock
SEALED AIR CORP NEW	Materials	\$0-\$10,000	Common Stock
SHERWIN WILLIAMS CO	Materials	\$0-\$10,000	Common Stock
SIMON PROPERTY GROUP INC REIT	Real Estate	\$0-\$10,000	Common Stock
SKYWORKS SOLUTIONS INC	Information Technology	\$0-\$10,000	Common Stock
SNAP ON INC	Industrials	\$0-\$10,000	Common Stock
STANLEY BLACK & DECKER INC	Industrials	\$0-\$10,000	Common Stock
STARBUCKS CORP	Consumer Discretionary	\$10,000-\$100,000	Common Stock
STATE STREET CORP	Financials	\$0-\$10,000	Common Stock
SYSCO CORP	Consumer Staples	\$0-\$10,000	Common Stock
T J X COMPANIES INC	Consumer Discretionary	\$0-\$10,000	Common Stock
TEXAS INSTRUMENTS INC	Information Technology	\$0-\$10,000	Common Stock
THE BOEING COMPANY	Industrials	\$10,000-\$100,000	Common Stock
THE KRAFT HEINZ COMPANY	Consumer Staples	\$0-\$10,000	Common Stock
THE PROCTER & GAMBLE COMPANY	Consumer Staples	\$10,000-\$100,000	Common Stock
THE TRAVELERS COMPANIES INC	Financials	\$0-\$10,000	Common Stock
THE WALT DISNEY COMPANY	Telecommunications Services	\$10,000-\$100,000	Common Stock
TORCHMARK CORPORATION	Financials	\$0-\$10,000	Common Stock
TRACTOR SUPPLY COMPANY	Consumer Discretionary	\$0-\$10,000	Common Stock
TRANSDIGM GROUP INC	Industrials	\$0-\$10,000	Common Stock
TYSON FOODS INC CLASS A	Consumer Staples	\$0-\$10,000	Common Stock
ULTA SALON COSMETICS & FRAGRANCE INC	Consumer Discretionary	\$0-\$10,000	Common Stock
UNION PAC CORP	Industrials	\$10,000-\$100,000	Common Stock
UNITED PARCEL SERVICE CL B	Industrials	\$0-\$10,000	Common Stock
UNITED RENTALS INC	Industrials	\$0-\$10,000	Common Stock
UNITED TECHNOLOGIES CORP	Industrials	\$0-\$10,000	Common Stock
UNITEDHEALTH GROUP INC	Healthcare	\$10,000-\$100,000	Common Stock
UNUM GROUP	Financials	\$0-\$10,000	Common Stock
VALERO ENERGY CORP NEW	Energy	\$0-\$10,000	Common Stock
VERISIGN INC	Information Technology	\$0-\$10,000	Common Stock
VERIZON COMMUNICATIONS INC	Telecommunications Services	\$10,000-\$100,000	Common Stock
VERTEX PHARMACEUTICALS INC	Healthcare	\$0-\$10,000	Common Stock
VISA INC-CLASS A SHRS	Information Technology	\$10,000-\$100,000	Common Stock
WABTEC CORP	Industrials	\$0-\$10,000	Common Stock
WAL MART STORES INC	Consumer Staples	\$10,000-\$100,000	Common Stock
WELLS FARGO & COMPANY	Financials	\$10,000-\$100,000	Common Stock
WESTROCK COMPANY	Materials	\$0-\$10,000	Common Stock
WEYERHAEUSER COMPANY	Real Estate	\$0-\$10,000	Common Stock
WYNN RESORTS LTD	Consumer Discretionary	\$0-\$10,000	Common Stock
XEROX HOLDINGS CORP	Information Technology	\$0-\$10,000	Common Stock
XILINX INC	Information Technology	\$0-\$10,000	Common Stock
ZIMMER HOLDINGS INC	Healthcare	\$0-\$10,000	Common Stock

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Investments Sold

Name:  
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Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
ACCENTURE PLC	Information Technology	\$2,000-\$10,000	Common Stock
ALLERGAN PLC	Health Care	\$2,000-\$10,000	Common Stock
ALPHABET INC CLASS A	Information Technology	\$2,000-\$10,000	Common Stock
ALPHABET INC CLASS C	Information Technology	\$10,000-\$100,000	Common Stock
AMAZON COM INC	Information Technology	\$10,000-\$100,000	Common Stock
AMERICAN INTL GROUP INC	Financials	\$2,000-\$10,000	Common Stock
AMERICAN TOWER CORP	Real Estate	\$2,000-\$10,000	Common Stock
AMERICAN TOWER CORP	Real Estate	\$2,000-\$10,000	Common Stock
AMERIPRISE FINANCIAL INC	Financials	\$2,000-\$10,000	Common Stock
AMERISOURCEBERGEN CORP	Health Care	\$2,000-\$10,000	Common Stock
AMGEN INC	Health Care	\$2,000-\$10,000	Common Stock
AMGEN INC	Health Care	\$2,000-\$10,000	Common Stock
ANADARKO PETROLEUM CORP	Energy	\$2,000-\$10,000	Common Stock
ANADARKO PETROLEUM CORP	Energy	\$2,000-\$10,000	Common Stock
APPLE INC	Information Technology	\$10,000-\$100,000	Common Stock
APPLIED MATERIALS INC	Information Technology	\$2,000-\$10,000	Common Stock
APPLIED MATERIALS INC	Information Technology	\$2,000-\$10,000	Common Stock
APPLIED MATERIALS INC	Information Technology	\$2,000-\$10,000	Common Stock
AT&T INC	Communication	\$2,000-\$10,000	Common Stock
AT&T INC	Communication	\$2,000-\$10,000	Common Stock
BANK OF AMERICA CORP	Financials	\$2,000-\$10,000	Common Stock
BANK OF NEW YORK MELLON CORP/	Financials	\$2,000-\$10,000	Common Stock
BAXTER INTL INC	Health Care	\$2,000-\$10,000	Common Stock
BAXTER INTL INC	Health Care	\$2,000-\$10,000	Common Stock

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Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
BERKSHIRE HATHAWAY INC CL B	Financials	\$10,000-\$100,000	Common Stock
BERKSHIRE HATHAWAY INC CL B	Financials	\$10,000-\$100,000	Common Stock
BOEING CO	Industrials	\$10,000-\$100,000	Common Stock
BOOKING HOLDINGS INC	Information Technology	\$2,000-\$10,000	Common Stock
BOSTON SCIENTIFIC CORP	Health Care	\$2,000-\$10,000	Common Stock
BRISTOL MYERS SQUIBB CO	Health Care	\$2,000-\$10,000	Common Stock
BROADCOM INC	Information Technology	\$2,000-\$10,000	Common Stock
BROADCOM INC	Information Technology	\$2,000-\$10,000	Common Stock
CABOT OIL & GAS CORP	Energy	\$2,000-\$10,000	Common Stock
CATERPILLAR INC	Industrials	\$10,000-\$100,000	Common Stock
CELGENE CORP	Health Care	\$2,000-\$10,000	Common Stock
CERNER CORP	Information Technology	\$2,000-\$10,000	Common Stock
CHEVRON CORP	Energy	\$10,000-\$100,000	Common Stock
CHEVRON CORP	Energy	\$2,000-\$10,000	Common Stock
CINTAS CORP	Consumer Discretionary	\$10,000-\$100,000	Common Stock
CISCO SYS INC	Information Technology	\$2,000-\$10,000	Common Stock
CISCO SYS INC	Information Technology	\$2,000-\$10,000	Common Stock
CME GROUP INC	Financials	\$2,000-\$10,000	Common Stock
COCA-COLA CO	Consumer Staples	\$2,000-\$10,000	Common Stock
COGNIZANT TECH SOLUTIONS CL A	Information Technology	\$2,000-\$10,000	Common Stock
COLGATE PALMOLIVE CO	Consumer Staples	\$2,000-\$10,000	Common Stock
COMERICA INC	Financials	\$2,000-\$10,000	Common Stock
CORNING INC	Information Technology	\$10,000-\$100,000	Common Stock
CSX CORP	Industrials	\$2,000-\$10,000	Common Stock

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Name:  
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Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
CVS HEALTH CORP	Health Care	\$10,000-\$100,000	Common Stock
CVS HEALTH CORP	Health Care	\$2,000-\$10,000	Common Stock
DUKE ENERGY CORP	Utilities	\$2,000-\$10,000	Common Stock
ECOLAB INC	Materials	\$2,000-\$10,000	Common Stock
EQT CORPORATION INC	Energy	\$2,000-\$10,000	Common Stock
EXXON MOBIL CORP	Energy	\$10,000-\$100,000	Common Stock
EXXON MOBIL CORP	Energy	\$2,000-\$10,000	Common Stock
FACEBOOK INC - A	Information Technology	\$10,000-\$100,000	Common Stock
FACEBOOK INC - A	Information Technology	\$2,000-\$10,000	Common Stock
FACEBOOK INC - A	Information Technology	\$2,000-\$10,000	Common Stock
FEDEX CORP	Industrials	\$2,000-\$10,000	Common Stock
FISERV INC	Information Technology	\$2,000-\$10,000	Common Stock
FMC CORP	Materials	\$2,000-\$10,000	Common Stock
FORTINET INC	Information Technology	\$2,000-\$10,000	Common Stock
GENERAL DYNAMICS CORP	Industrials	\$10,000-\$100,000	Common Stock
GENERAL ELECTRIC CO	Industrials	\$2,000-\$10,000	Common Stock
GOLDMAN SACHS GROUP INC	Financials	\$10,000-\$100,000	Common Stock
HALLIBURTON CO HOLDINGS CO	Energy	\$2,000-\$10,000	Common Stock
HEALTHPEAK PROPERTIES INC	Real Estate	\$2,000-\$10,000	Common Stock
HOME DEPOT INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
HONEYWELL INTL INC	Industrials	\$2,000-\$10,000	Common Stock
ILLINOIS TOOL WORKS INC	Industrials	\$2,000-\$10,000	Common Stock
INTEL CORP	Information Technology	\$2,000-\$10,000	Common Stock
INTERNATIONAL PAPER CO	Materials	\$2,000-\$10,000	Common Stock

\*

Schedule A-1  
Investments Sold

Name:  
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
JM SMUCKER CO/THE	Consumer Staples	\$2,000-\$10,000	Common Stock
JOHNSON & JOHNSON	Health Care	\$10,000-\$100,000	Common Stock
JOHNSON & JOHNSON	Health Care	\$10,000-\$100,000	Common Stock
JPMORGAN CHASE & CO	Financials	\$10,000-\$100,000	Common Stock
JPMORGAN CHASE & CO	Financials	\$2,000-\$10,000	Common Stock
JPMORGAN CHASE & CO	Financials	\$2,000-\$10,000	Common Stock
KIMCO REALTY CORPORATION	Real Estate	\$2,000-\$10,000	Common Stock
KINDER MORGAN INC/DE	Energy	\$2,000-\$10,000	Common Stock
KRAFT HEINZ CO/THE	Consumer Staples	\$2,000-\$10,000	Common Stock
KRAFT HEINZ CO/THE	Consumer Staples	\$2,000-\$10,000	Common Stock
LAM RESEARCH CORP	Information Technology	\$2,000-\$10,000	Common Stock
LOWE'S COS INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
MARRIOTT INTL INC NEW CL A	Consumer Discretionary	\$2,000-\$10,000	Common Stock
MASTERCARD INCORPORATED	Financials	\$10,000-\$100,000	Common Stock
MCDONALD'S CORP	Consumer Discretionary	\$2,000-\$10,000	Common Stock
MCKESSON CORP	Health Care	\$2,000-\$10,000	Common Stock
MEDTRONIC PLC	Health Care	\$2,000-\$10,000	Common Stock
MERCK & CO INC NEW	Health Care	\$2,000-\$10,000	Common Stock
MICRON TECHNOLOGY INC	Information Technology	\$2,000-\$10,000	Common Stock
MICROSOFT CORP	Information Technology	\$10,000-\$100,000	Common Stock
MID-AMERICA APARTMENT CMNTYS	Real Estate	\$2,000-\$10,000	Common Stock
NETFLIX INC	Information Technology	\$2,000-\$10,000	Common Stock
NETFLIX INC	Information Technology	\$2,000-\$10,000	Common Stock
NEWMONT CORPORATION	Materials	\$2,000-\$10,000	Common Stock

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Schedule A-1  
Investments Sold

Name:  
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
NEWS CORP/NEW-CL A-	Consumer Discretionary	\$2,000-\$10,000	Common Stock
NEXTERA ENERGY INC	Utilities	\$2,000-\$10,000	Common Stock
NIKE INC CL B	Consumer Discretionary	\$2,000-\$10,000	Common Stock
NIKE INC CL B	Consumer Discretionary	\$2,000-\$10,000	Common Stock
NORTONLIFELOCK INC	Information Technology	\$2,000-\$10,000	Common Stock
NORTONLIFELOCK INC	Information Technology	\$2,000-\$10,000	Common Stock
PAYCHEX INC	Information Technology	\$2,000-\$10,000	Common Stock
PEPSICO INC	Consumer Staples	\$2,000-\$10,000	Common Stock
PEPSICO INC	Consumer Staples	\$2,000-\$10,000	Common Stock
PERKINELMER INC	Industrials	\$2,000-\$10,000	Common Stock
PERRIGO CO PLC	Health Care	\$2,000-\$10,000	Common Stock
PFIZER INC	Health Care	\$2,000-\$10,000	Common Stock
PHILIP MORRIS INTERNATIONAL	Consumer Staples	\$10,000-\$100,000	Common Stock
PHILIP MORRIS INTERNATIONAL	Consumer Staples	\$2,000-\$10,000	Common Stock
PIONEER NATURAL RESOURCES CO	Consumer Staples	\$2,000-\$10,000	Common Stock
PIONEER NATURAL RESOURCES CO	Energy	\$2,000-\$10,000	Common Stock
PROCTER & GAMBLE CO/THE	Energy	\$2,000-\$10,000	Common Stock
PRUDENTIAL FINANCIAL INC	Consumer Staples	\$10,000-\$100,000	Common Stock
PUBLIC SERVICE ENTERPRISE GRP	Financials	\$2,000-\$10,000	Common Stock
PUBLIC STORAGE (MD)	Utilities	\$2,000-\$10,000	Common Stock
QUALCOMM INC	Real Estate	\$2,000-\$10,000	Common Stock
RED HAT INC	Information Technology	\$2,000-\$10,000	Common Stock
S&P GLOBAL INC	Information Technology	\$2,000-\$10,000	Common Stock
SALESFORCE.COM INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
	Information Technology	\$2,000-\$10,000	Common Stock

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Schedule A-1

Name:

Investments Sold

Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	*Market Value Range per Form 700 guidelines	Nature of Investment
SCHWAB CHARLES CORP	Financials	\$2,000-\$10,000	Common Stock
SIMON PROPERTY GROUP INC	Real Estate	\$2,000-\$10,000	Common Stock
SIMON PROPERTY GROUP INC	Real Estate	\$2,000-\$10,000	Common Stock
SOUTHWEST AIRLINES CO	Industrials	\$2,000-\$10,000	Common Stock
STANLEY BLACK & DECKER INC	Industrials	\$2,000-\$10,000	Common Stock
STARBUCKS CORP	Consumer Discretionary	\$10,000-\$100,000	Common Stock
T MOBILE US INC	Communication	\$2,000-\$10,000	Common Stock
TRAVELERS COMPANIES INC	Financials	\$2,000-\$10,000	Common Stock
UNDER ARMOUR INC CLASS A	Consumer Discretionary	\$2,000-\$10,000	Common Stock
UNION PACIFIC CORP	Industrials	\$2,000-\$10,000	Common Stock
UNITEDHEALTH GROUP INC	Health Care	\$2,000-\$10,000	Common Stock
US BANCORP DEL NEW	Financials	\$10,000-\$100,000	Common Stock
VENTAS INC	Real Estate	\$2,000-\$10,000	Common Stock
VERIZON COMMUNICATIONS	Communication	\$2,000-\$10,000	Common Stock
VERIZON COMMUNICATIONS	Communication	\$2,000-\$10,000	Common Stock
VISA INC COM CL A	Financials	\$2,000-\$10,000	Common Stock
WALMART INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
WALMART INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
WALT DISNEY CO	Consumer Discretionary	\$2,000-\$10,000	Common Stock
WASTE MGMT INC DEL	Consumer Discretionary	\$2,000-\$10,000	Common Stock
WATERS CORP	Industrials	\$2,000-\$10,000	Common Stock
WELLS FARGO & CO NEW	Industrials	\$2,000-\$10,000	Common Stock
	Financials	\$10,000-\$100,000	Common Stock

Schedule A-1  
Investments Sold

Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	Market Value	Nature of Investment
A E S CORP	Utilities	\$0-\$10,000	Common Stock
ABBOTT LABORATORIES	Healthcare	\$10,000-\$100,000	Common Stock
ABBVIE INC.	Healthcare	\$0-\$10,000	Common Stock
ABIOMED INC	Healthcare	\$0-\$10,000	Common Stock
ADVANCED AUTO PARTS INC	Consumer Discretionary	\$0-\$10,000	Common Stock
AFFILIATED MANAGERS GROUP INC	Financials	\$0-\$10,000	Common Stock
AIR PRODS & CHEMS INC	Materials	\$0-\$10,000	Common Stock
ALBEMARLE CORP	Materials	\$0-\$10,000	Common Stock
ALLIANT ENERGY CORP	Utilities	\$0-\$10,000	Common Stock
ALLSTATE CORP	Financials	\$0-\$10,000	Common Stock
ALPHABET INC/CA-CL A	Telecommunications Services	\$0-\$10,000	Common Stock
ALPHABET INC-CL C	Telecommunications Services	\$0-\$10,000	Common Stock
ALTRIA GROUP INC	Consumer Staples	\$0-\$10,000	Common Stock
AMAZON.COM INC	Consumer Discretionary	\$0-\$10,000	Common Stock
AMEREN CORPORATION	Utilities	\$0-\$10,000	Common Stock
AMERICAN EXPRESS CO	Financials	\$0-\$10,000	Common Stock
AMERICAN INTERNATIONAL GROUP	Financials	\$0-\$10,000	Common Stock
AMERICAN WATER WORKS CO INC	Utilities	\$0-\$10,000	Common Stock
AMERISOURCEBERGEN CORP	Healthcare	\$0-\$10,000	Common Stock
AMGEN INC	Healthcare	\$0-\$10,000	Common Stock
ANALOG DEVICES INC	Information Technology	\$0-\$10,000	Common Stock
AON PLC	Financials	\$0-\$10,000	Common Stock
APACHE CORP	Energy	\$0-\$10,000	Common Stock
APPLE INC	Information Technology	\$10,000-\$100,000	Common Stock
APPLIED MATERIALS INC	Information Technology	\$0-\$10,000	Common Stock
APTIV PLC	Consumer Discretionary	\$0-\$10,000	Common Stock
ARISTA NETWORKS INC	Information Technology	\$0-\$10,000	Common Stock
AT&T INC	Telecommunications Services	\$0-\$10,000	Common Stock
ATMOS ENERGY CORP	Utilities	\$0-\$10,000	Common Stock
AUTOMATIC DATA PROCESSING INC	Information Technology	\$0-\$10,000	Common Stock
BAKER HUGHES COMPANY	Energy	\$0-\$10,000	Common Stock
BALL CORP	Materials	\$0-\$10,000	Common Stock
BANK OF AMERICA CORP	Financials	\$0-\$10,000	Common Stock
BAXTER INTERNATIONAL INC	Healthcare	\$0-\$10,000	Common Stock
BECTON DICKINSON & CO	Healthcare	\$0-\$10,000	Common Stock
BEST BUY INC	Consumer Discretionary	\$0-\$10,000	Common Stock
BIOGEN INC	Healthcare	\$0-\$10,000	Common Stock
BLOCK H & R INC	Consumer Discretionary	\$0-\$10,000	Common Stock
BOEING CO	Industrials	\$0-\$10,000	Common Stock
BOOKING HOLDINGS INC	Consumer Discretionary	\$0-\$10,000	Common Stock
BRISTOL-MYERS SQUIBB CO	Healthcare	\$0-\$10,000	Common Stock
BROADRIDGE FINANCIAL SOLUTIONS INC	Information Technology	\$0-\$10,000	Common Stock
C B S CORP-CLASS B	Telecommunications Services	\$0-\$10,000	Common Stock
C D K GLOBAL INC.	Information Technology	\$0-\$10,000	Common Stock
C M S ENERGY CORP	Utilities	\$0-\$10,000	Common Stock
C S X CORP	Industrials	\$0-\$10,000	Common Stock
CADENCE DESIGN SYS INC	Information Technology	\$0-\$10,000	Common Stock
CAMPBELL SOUP CO	Consumer Staples	\$0-\$10,000	Common Stock
CARNIVAL CORP	Consumer Discretionary	\$0-\$10,000	Common Stock
CATERPILLAR INC	Industrials	\$0-\$10,000	Common Stock
CBOE GLOBAL MARKETS INC	Financials	\$0-\$10,000	Common Stock
CELANESE CORP	Materials	\$0-\$10,000	Common Stock
CENTERPOINT ENERGY INC	Utilities	\$0-\$10,000	Common Stock
CENTURYLINK INC	Telecommunications Services	\$0-\$10,000	Common Stock
CF INDUSTRIES HOLDINGS INC	Materials	\$0-\$10,000	Common Stock
CHEVRON CORPORATION	Energy	\$0-\$10,000	Common Stock
CHIPOTLE MEXICAN GRILL INC -CL A	Consumer Discretionary	\$0-\$10,000	Common Stock
CHURCH & DWIGHT INC	Consumer Staples	\$0-\$10,000	Common Stock
CIGNA CORP	Healthcare	\$0-\$10,000	Common Stock
CITRIX SYS INC	Information Technology	\$0-\$10,000	Common Stock
COGNIZANT TECHNOLOGY SOLUTIONS CORP	Information Technology	\$0-\$10,000	Common Stock
COLGATE-PALMOLIVE CO	Consumer Staples	\$0-\$10,000	Common Stock
COMCAST CORP CL A	Telecommunications Services	\$0-\$10,000	Common Stock
COMERICA INC	Financials	\$0-\$10,000	Common Stock
CONAGRA BRANDS INC	Consumer Staples	\$0-\$10,000	Common Stock
CONSOLIDATED EDISON INC	Utilities	\$0-\$10,000	Common Stock
CONSTELLATION BRANDS INC	Consumer Staples	\$0-\$10,000	Common Stock



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Investments Sold

Stephen Juelsgaard

CONTINENTAL RESOURCES INC	Energy	\$0-\$10,000	Common Stock
CORNING INC	Information Technology	\$0-\$10,000	Common Stock
CORTEVA INC	Materials	\$0-\$10,000	Common Stock
COSTCO WHSL CORP NEW	Consumer Staples	\$0-\$10,000	Common Stock
D T E ENERGY COMPANY	Utilities	\$0-\$10,000	Common Stock
DANAHER CORP	Healthcare	\$0-\$10,000	Common Stock
DEERE & CO	Industrials	\$0-\$10,000	Common Stock
DENTSPLY SIRONA INC	Healthcare	\$0-\$10,000	Common Stock
DIAMONDBACK ENERGY INC	Energy	\$0-\$10,000	Common Stock
DIGITAL REALTY TRUST INC	Real Estate	\$0-\$10,000	Common Stock
DISCOVER FINANCIAL SERVICES	Financials	\$0-\$10,000	Common Stock
DISH NETWORK CORP-A	Telecommunications Services	\$0-\$10,000	Common Stock
DISH NETWORK CORP-RTS-W/I	Telecommunications Services	\$0-\$10,000	Common Stock
DOLLAR GENERAL CORP	Consumer Discretionary	\$0-\$10,000	Common Stock
DOLLAR TREE INC	Consumer Discretionary	\$0-\$10,000	Common Stock
DOMINION ENERGY INC	Utilities	\$0-\$10,000	Common Stock
DUKE ENERGY CORP	Utilities	\$0-\$10,000	Common Stock
DUN & BRADSTREET CORP DEL NEW	Information Technology	\$0-\$10,000	Common Stock
DUPONT DE NEMOURS INC	Materials	\$0-\$10,000	Common Stock
E O G RES INC	Energy	\$0-\$10,000	Common Stock
EATON VANCE CORP	Financials	\$0-\$10,000	Common Stock
EBAY INC	Consumer Discretionary	\$0-\$10,000	Common Stock
ECOLAB INC	Materials	\$0-\$10,000	Common Stock
EQUIFAX INC	Industrials	\$0-\$10,000	Common Stock
EQUINIX INC	Real Estate	\$0-\$10,000	Common Stock
ESTEE LAUDER COMPANIES CLASS A	Consumer Staples	\$10,000-\$100,000	Common Stock
EVERGY INC	Utilities	\$0-\$10,000	Common Stock
EVERSOURCE ENERGY	Utilities	\$0-\$10,000	Common Stock
EXTRA SPACE STORAGE INC	Real Estate	\$0-\$10,000	Common Stock
EXXON MOBIL CORP	Energy	\$0-\$10,000	Common Stock
F5 NETWORKS INC	Information Technology	\$0-\$10,000	Common Stock
FEDERAL RLTY INVS TRUST	Telecommunications Services	\$0-\$10,000	Common Stock
FLEETCOR TECHNOLOGIES INC	Information Technology	\$0-\$10,000	Common Stock
FLIR SYS INC	Information Technology	\$0-\$10,000	Common Stock
FOOT LOCKER INC	Consumer Discretionary	\$0-\$10,000	Common Stock
FORTINET INC	Information Technology	\$0-\$10,000	Common Stock
FOX CORP - CLASS A	Telecommunications Services	\$0-\$10,000	Common Stock
FOX CORP - CLASS A - W/I	Telecommunications Services	\$0-\$10,000	Common Stock
FREEMPORT-MCMORAN INC	Materials	\$0-\$10,000	Common Stock
GAP INC	Consumer Discretionary	\$0-\$10,000	Common Stock
GENERAL DYNAMICS CORP	Industrials	\$0-\$10,000	Common Stock
GENERAL MILLS INC	Consumer Staples	\$0-\$10,000	Common Stock
GENERAL MOTORS CO	Consumer Discretionary	\$0-\$10,000	Common Stock
GILEAD SCIENCES INC	Healthcare	\$0-\$10,000	Common Stock
GLOBE LIFE INC	Financials	\$0-\$10,000	Common Stock
H P INC	Information Technology	\$0-\$10,000	Common Stock
HALLIBURTON CO	Energy	\$0-\$10,000	Common Stock
HCA HEALTHCARE INC	Healthcare	\$0-\$10,000	Common Stock
HERBALIFE NUTRITION LTD	Consumer Staples	\$0-\$10,000	Common Stock
HESS CORP	Energy	\$0-\$10,000	Common Stock
HOLLYFRONTIER CORP	Energy	\$0-\$10,000	Common Stock
HOLOGIC INC	Healthcare	\$0-\$10,000	Common Stock
HOME DEPOT INC	Consumer Discretionary	\$0-\$10,000	Common Stock
HUMANA INC	Healthcare	\$0-\$10,000	Common Stock
HUNTSMAN CORP	Materials	\$0-\$10,000	Common Stock
IDEXX LABS INC	Healthcare	\$0-\$10,000	Common Stock
ILLUMINA INC	Healthcare	\$0-\$10,000	Common Stock
INGERSOLL-RAND PLC	Industrials	\$0-\$10,000	Common Stock
INTERNATIONAL BUSINESS MACHINES CORP	Information Technology	\$0-\$10,000	Common Stock
INTUIT	Information Technology	\$0-\$10,000	Common Stock
IRON MOUNTAIN INC	Industrials	\$0-\$10,000	Common Stock
JACOBS ENGR GROUP INC	Industrials	\$0-\$10,000	Common Stock
JOHNSON & JOHNSON	Healthcare	\$0-\$10,000	Common Stock
JOHNSON CTLS INTL PLC	Industrials	\$0-\$10,000	Common Stock
JP MORGAN CHASE & CO	Financials	\$0-\$10,000	Common Stock
KEYSIGHT TECHNOLOGIES IN	Other U.S. Common Stocks	\$0-\$10,000	Common Stock
KINDER MORGAN INC	Energy	\$0-\$10,000	Common Stock
KROGER CO	Consumer Staples	\$0-\$10,000	Common Stock
L3HARRIS TECHNOLOGIES INC	Industrials	\$0-\$10,000	Common Stock
LABORATORY CORP AMER HLDGS	Healthcare	\$0-\$10,000	Common Stock
LAS VEGAS SANDS CORP	Consumer Discretionary	\$0-\$10,000	Common Stock
LENNAR CORP CLASS A	Consumer Discretionary	\$0-\$10,000	Common Stock

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LENNOX INTL INC	Industrials	\$0-\$10,000	Common Stock
LILLY ELI & CO	Healthcare	\$0-\$10,000	Common Stock
LINCOLN NATL CORP IND	Financials	\$0-\$10,000	Common Stock
LOCKHEED MARTIN CORP	Industrials	\$0-\$10,000	Common Stock
LOEWS CORP	Financials	\$0-\$10,000	Common Stock
LOWE'S COMPANIES INC	Consumer Discretionary	\$0-\$10,000	Common Stock
LYONDELLBASELL INDU -CL A	Materials	\$0-\$10,000	Common Stock
M D U RES GROUP INC	Utilities	\$0-\$10,000	Common Stock
MACY'S INC	Consumer Discretionary	\$0-\$10,000	Common Stock
MARATHON PETROLEUM CORP	Energy	\$0-\$10,000	Common Stock
MARSH & MCLENNAN COS INC	Financials	\$0-\$10,000	Common Stock
MATCH GROUP INC	Telecommunications Services	\$0-\$10,000	Common Stock
MAXIM INTEGRATED PRODS INC	Information Technology	\$0-\$10,000	Common Stock
MC DONALD'S CORPORATION	Consumer Discretionary	\$0-\$10,000	Common Stock
MCKESSON CORPORATION	Healthcare	\$0-\$10,000	Common Stock
METLIFE INC	Financials	\$0-\$10,000	Common Stock
METTLER-TOLEDO INTL INC	Healthcare	\$0-\$10,000	Common Stock
MICROCHIP TECHNOLOGY INC	Information Technology	\$0-\$10,000	Common Stock
MICRON TECHNOLOGY INC	Information Technology	\$0-\$10,000	Common Stock
MOLSON COORS BREWING CO-B	Consumer Staples	\$0-\$10,000	Common Stock
MONDELEZ INTERNATIONAL	Consumer Staples	\$0-\$10,000	Common Stock
MONSTER BEVERAGE CORP	Consumer Staples	\$0-\$10,000	Common Stock
MOSAIC CO/THE-WI	Materials	\$0-\$10,000	Common Stock
MOTOROLA SOLUTIONS INC.	Information Technology	\$10,000-\$100,000	Common Stock
MYLAN NV	Healthcare	\$0-\$10,000	Common Stock
NATIONAL OILWELL VARCO INC.	Energy	\$0-\$10,000	Common Stock
NETFLIX COM INC	Telecommunications Services	\$0-\$10,000	Common Stock
NEWELL BRANDS INC	Consumer Discretionary	\$0-\$10,000	Common Stock
NIelsen HOLDINGS PLC	Industrials	\$0-\$10,000	Common Stock
NIKE INC CLASS B	Consumer Discretionary	\$0-\$10,000	Common Stock
NORTHROP GRUMMAN CORP	Industrials	\$0-\$10,000	Common Stock
NRG ENERGY INC	Utilities	\$0-\$10,000	Common Stock
NVIDIA CORP	Information Technology	\$0-\$10,000	Common Stock
OCCIDENTAL PETROLEUM CORP	Energy	\$0-\$10,000	Common Stock
OGE ENERGY CORP	Utilities	\$0-\$10,000	Common Stock
ONEOK INC	Energy	\$0-\$10,000	Common Stock
ORACLE CORP	Information Technology	\$0-\$10,000	Common Stock
PARKER HANNIFIN CORP	Industrials	\$0-\$10,000	Common Stock
PENTAIR PLC	Industrials	\$0-\$10,000	Common Stock
PEOPLE'S UNITED FINANCIAL IN	Financials	\$0-\$10,000	Common Stock
PEPSICO INC	Consumer Staples	\$0-\$10,000	Common Stock
PHILIP MORRIS INTERNAT	Consumer Staples	\$0-\$10,000	Common Stock
PHILLIPS 66	Energy	\$0-\$10,000	Common Stock
PINNACLE WEST CAP CORP	Utilities	\$0-\$10,000	Common Stock
POPULAR INC	Financials	\$0-\$10,000	Common Stock
PPL CORP	Utilities	\$0-\$10,000	Common Stock
PROGRESSIVE CORP OHIO	Financials	\$0-\$10,000	Common Stock
PROLOGIS INC	Real Estate	\$0-\$10,000	Common Stock
PRUDENTIAL FINANCIAL INC	Financials	\$0-\$10,000	Common Stock
PUBLIC STORAGE INC REIT	Real Estate	\$0-\$10,000	Common Stock
PUBLIC SVC ENTERPRISE GROUP INC	Utilities	\$0-\$10,000	Common Stock
PULTE GROUP INC	Consumer Discretionary	\$0-\$10,000	Common Stock
Q O R V O INC	Information Technology	\$0-\$10,000	Common Stock
QUEST DIAGNOSTICS INC	Healthcare	\$0-\$10,000	Common Stock
REGENCY CTRS CORP	Real Estate	\$0-\$10,000	Common Stock
REGENERON PHARMACEUTICALS INC	Healthcare	\$0-\$10,000	Common Stock
ROPER TECHNOLOGIES INC	Industrials	\$0-\$10,000	Common Stock
ROSS STORES INC	Consumer Discretionary	\$0-\$10,000	Common Stock
ROYAL CARIBBEAN CRUISES LTD	Consumer Discretionary	\$0-\$10,000	Common Stock
S & P GLOBAL INC	Financials	\$0-\$10,000	Common Stock
SEMPRA ENERGY	Utilities	\$0-\$10,000	Common Stock
SERVICENOW INC	Information Technology	\$0-\$10,000	Common Stock
SIRIUS XM HOLDINGS INC	Telecommunications Services	\$0-\$10,000	Common Stock
SKYWORKS SOLUTIONS INC	Information Technology	\$0-\$10,000	Common Stock
SMITH A O CORP	Industrials	\$0-\$10,000	Common Stock
SMUCKER J M CO	Consumer Staples	\$0-\$10,000	Common Stock
SPIRIT AEROSYSTEMS HOLD CL A	Consumer Discretionary	\$0-\$10,000	Common Stock
STATE STREET CORP	Financials	\$0-\$10,000	Common Stock
STRYKER CORP	Healthcare	\$0-\$10,000	Common Stock
SYNCHRONY FINANCIAL	Financials	\$0-\$10,000	Common Stock
SYSCO CORP	Consumer Staples	\$0-\$10,000	Common Stock
T E CONNECTIVITY LTD	Information Technology	\$0-\$10,000	Common Stock

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T J X COMPANIES INC	Consumer Discretionary	\$0-\$10,000	Common Stock
T ROWE PRICE GROUP INC	Financials	\$0-\$10,000	Common Stock
TAKE-TWO INTERACTIVE SOFTWARE INC	Telecommunications Services	\$0-\$10,000	Common Stock
TAPESTRY INC.	Consumer Discretionary	\$0-\$10,000	Common Stock
TECHNIPFMC LTD	Energy	\$0-\$10,000	Common Stock
TEXAS INSTRUMENTS INC	Information Technology	\$10,000-\$100,000	Common Stock
TEXTRON INC	Industrials	\$0-\$10,000	Common Stock
THE TRAVELERS COMPANIES INC	Financials	\$0-\$10,000	Common Stock
TRIPADVISOR INC	Telecommunications Services	\$0-\$10,000	Common Stock
TWENTY-FIRST CENTURY FOX INC	Telecommunications Services	\$0-\$10,000	Common Stock
UDR INC	Real Estate	\$0-\$10,000	Common Stock
UNDER ARMOUR INC -CL A	Consumer Discretionary	\$0-\$10,000	Common Stock
UNION PAC CORP	Industrials	\$0-\$10,000	Common Stock
UNITED AIRLINES HOLDINGS INC	Industrials	\$0-\$10,000	Common Stock
UNITED PARCEL SERVICE CL B	Industrials	\$0-\$10,000	Common Stock
UNUM GROUP	Financials	\$0-\$10,000	Common Stock
VENTAS INC	Real Estate	\$0-\$10,000	Common Stock
VERIZON COMMUNICATIONS INC	Telecommunications Services	\$0-\$10,000	Common Stock
VIACOMCBS INC - CLASS B	Telecommunications Services	\$0-\$10,000	Common Stock
VISA INC-CLASS A SHRS	Information Technology	\$0-\$10,000	Common Stock
VISTEON CORP	Consumer Discretionary	\$0-\$10,000	Common Stock
VULCAN MATERIALS CO	Materials	\$0-\$10,000	Common Stock
WALMART INC	Consumer Staples	\$0-\$10,000	Common Stock
WALT DISNEY CO/THE	Telecommunications Services	\$10,000-\$100,000	Common Stock
WASTE MANAGEMENT INC	Industrials	\$0-\$10,000	Common Stock
WATERS CORP	Healthcare	\$0-\$10,000	Common Stock
WESTLAKE CHEMICAL CORP	Materials	\$0-\$10,000	Common Stock
WILLIAMS COS INC	Energy	\$0-\$10,000	Common Stock
WYNDHAM DESTINATIONS INC	Consumer Discretionary	\$0-\$10,000	Common Stock
WYNDHAM HOTELS & RESORTS INC	Consumer Discretionary	\$0-\$10,000	Common Stock
XYLEM INC	Industrials	\$0-\$10,000	Common Stock
ZEBRA TECHNOLOGIES CORP CL A	Information Technology	\$0-\$10,000	Common Stock
ZION BANCORP N.A.	Financials	\$0-\$10,000	Common Stock
ZOETIS INC	Healthcare	\$0-\$10,000	Common Stock

Schedule A-1  
Investments Sold

Stephen Juelsgaard

Security Description	General Description of Business Activity	Market Value	Nature of Investment
ADOBE INC	Information Technology	\$0-\$10,000	Common Stock
ALTA BA INC	Information Technology	\$0-\$10,000	Common Stock
AMERICAN TOWER CORP	Real Estate	\$0-\$10,000	Common Stock
BOEING CO	Industrials	\$0-\$10,000	Common Stock
BOSTON SCIENTIFIC CORP	Healthcare	\$0-\$10,000	Common Stock
CISCO SYSTEMS INC	Information Technology	\$0-\$10,000	Common Stock
CME GROUP INC	Financials	\$0-\$10,000	Common Stock
CONSTELLATION BRANDS INC	Consumer Staples	\$0-\$10,000	Common Stock
DOWDUPONT INC	Industrials	\$0-\$10,000	Common Stock
INTERCONTINENTAL EXCHANGE INC	Financials	\$0-\$10,000	Common Stock
MARVELL TECH GROUP LTD	Information Technology	\$0-\$10,000	Common Stock
MEDTRONIC PLC	Healthcare	\$0-\$10,000	Common Stock
MICRON TECHNOLOGY INC	Information Technology	\$0-\$10,000	Common Stock
MICROSOFT CORPORATION	Information Technology	\$0-\$10,000	Common Stock
MONDELEZ INTERNATIONAL	Consumer Staples	\$0-\$10,000	Common Stock
MSCI INC-A	Financials	\$0-\$10,000	Common Stock
PFIZER INC	Healthcare	\$0-\$10,000	Common Stock
QUALCOMM INC	Information Technology	\$0-\$10,000	Common Stock
SALESFORCE.COM INC	Information Technology	\$0-\$10,000	Common Stock
SCHWAB CHARLES CORP NEW	Financials	\$0-\$10,000	Common Stock
SVB FINANCIAL GROUP	Financials	\$0-\$10,000	Common Stock
TEXAS INSTRUMENTS INC	Information Technology	\$0-\$10,000	Common Stock
UNITEDHEALTH GROUP INC	Information Technology	\$0-\$10,000	Common Stock
VALERO ENERGY CORP NEW	Information Technology	\$0-\$10,000	Common Stock
VERIZON COMMUNICATIONS INC	Information Technology	\$0-\$10,000	Common Stock
WORKDAY INC-CLASS A	Information Technology	\$0-\$10,000	Common Stock
YUM! BRANDS INC	Consumer Discretionary	\$0-\$10,000	Common Stock

**SCHEDULE B**  
**Interests in Real Property**  
(Including Rental Income)

Name  
Stephen Juelsgaard

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS  
2025 Appollo Ct.

CITY  
Napa, CA

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:  
 \$2,000 - \$10,000  
 \$10,001 - \$100,000  
 \$100,001 - \$1,000,000  
 Over \$1,000,000

ACQUIRED: \_\_\_/\_\_\_/19 DISPOSED: \_\_\_/\_\_\_/19

NATURE OF INTEREST  
 Ownership/Deed of Trust     Easement  
 Leasehold \_\_\_\_\_ Yrs. remaining     \_\_\_\_\_ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED  
 \$0 - \$499     \$500 - \$1,000     \$1,001 - \$10,000  
 \$10,001 - \$100,000     OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.  
 None  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS  
860 Omaha Ct.

CITY  
Napa, CA

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:  
 \$2,000 - \$10,000  
 \$10,001 - \$100,000  
 \$100,001 - \$1,000,000  
 Over \$1,000,000

ACQUIRED: \_\_\_/\_\_\_/19 DISPOSED: \_\_\_/\_\_\_/19

NATURE OF INTEREST  
 Ownership/Deed of Trust     Easement  
 Leasehold \_\_\_\_\_ Yrs. remaining     \_\_\_\_\_ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED  
 \$0 - \$499     \$500 - \$1,000     \$1,001 - \$10,000  
 \$10,001 - \$100,000     OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.  
 None  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

\* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

INTEREST RATE \_\_\_\_\_%     None    TERM (Months/Years) \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD  
 \$500 - \$1,000     \$1,001 - \$10,000  
 \$10,001 - \$100,000     OVER \$100,000  
 Guarantor, if applicable

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

INTEREST RATE \_\_\_\_\_%     None    TERM (Months/Years) \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD  
 \$500 - \$1,000     \$1,001 - \$10,000  
 \$10,001 - \$100,000     OVER \$100,000  
 Guarantor, if applicable

Comments: \_\_\_\_\_

**SCHEDULE B**  
**Interests in Real Property**  
(Including Rental Income)

Name  
Stephen Juelsgaard

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS  
845 Omaha Ct.

CITY  
Napa, CA

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:  
 \$2,000 - \$10,000  
 \$10,001 - \$100,000  
 \$100,001 - \$1,000,000  
 Over \$1,000,000

ACQUIRED      /      / 19      DISPOSED      /      / 19

NATURE OF INTEREST  
 Ownership/Deed of Trust       Easement  
 Leasehold \_\_\_\_\_ Yrs. remaining       \_\_\_\_\_ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED  
 \$0 - \$499       \$500 - \$1,000       \$1,001 - \$10,000  
 \$10,001 - \$100,000       OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.  
 None  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS  
18396 N. Highway 88

CITY  
Lodi, CA

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:  
 \$2,000 - \$10,000  
 \$10,001 - \$100,000  
 \$100,001 - \$1,000,000  
 Over \$1,000,000

ACQUIRED      /      / 19      DISPOSED      /      / 19

NATURE OF INTEREST  
 Ownership/Deed of Trust       Easement  
 Leasehold \_\_\_\_\_ Yrs. remaining       \_\_\_\_\_ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED  
 \$0 - \$499       \$500 - \$1,000       \$1,001 - \$10,000  
 \$10,001 - \$100,000       OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.  
 None  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

\* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

INTEREST RATE \_\_\_\_\_ %       None      TERM (Months/Years) \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD  
 \$500 - \$1,000       \$1,001 - \$10,000  
 \$10,001 - \$100,000       OVER \$100,000  
 Guarantor, if applicable

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

INTEREST RATE \_\_\_\_\_ %       None      TERM (Months/Years) \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD  
 \$500 - \$1,000       \$1,001 - \$10,000  
 \$10,001 - \$100,000       OVER \$100,000  
 Guarantor, if applicable

Comments: \_\_\_\_\_

# SCHEDULE C

## Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name  
Stephen Juelsgaard

▶ 1. INCOME RECEIVED	▶ 1. INCOME RECEIVED
<p>NAME OF SOURCE OF INCOME <u>SFC Riverview Ranch LP</u></p> <p>ADDRESS <i>(Business Address Acceptable)</i> <u>577 Airport Blvd., Ste. 700, Burlingame, CA 94010</u></p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Apartment Ownership</u></p> <p>YOUR BUSINESS POSITION <u>Limited partner</u></p> <p>GROSS INCOME RECEIVED    <input type="checkbox"/> No Income - Business Position Only</p> <p><input type="checkbox"/> \$500 - \$1,000                      <input checked="" type="checkbox"/> \$1,001 - \$10,000</p> <p><input type="checkbox"/> \$10,001 - \$100,000              <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED</p> <p><input type="checkbox"/> Salary    <input type="checkbox"/> Spouse's or registered domestic partner's income <i>(For self-employed use Schedule A-2.)</i></p> <p><input checked="" type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ <i>(Real property, car, boat, etc.)</i></p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or    <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ <i>(Describe)</i></p> <p><input type="checkbox"/> Other _____ <i>(Describe)</i></p>	<p>NAME OF SOURCE OF INCOME <u>SFC Park Knolls Investors LP</u></p> <p>ADDRESS <i>(Business Address Acceptable)</i> <u>577 Airport Blvd., Ste. 700, Burlingame, CA 94010</u></p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Apartment Ownership</u></p> <p>YOUR BUSINESS POSITION <u>Limited partner</u></p> <p>GROSS INCOME RECEIVED    <input type="checkbox"/> No Income - Business Position Only</p> <p><input type="checkbox"/> \$500 - \$1,000                      <input checked="" type="checkbox"/> \$1,001 - \$10,000</p> <p><input type="checkbox"/> \$10,001 - \$100,000              <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED</p> <p><input type="checkbox"/> Salary    <input type="checkbox"/> Spouse's or registered domestic partner's income <i>(For self-employed use Schedule A-2.)</i></p> <p><input checked="" type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ <i>(Real property, car, boat, etc.)</i></p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or    <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ <i>(Describe)</i></p> <p><input type="checkbox"/> Other _____ <i>(Describe)</i></p>

**▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD**

\* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

<p>NAME OF LENDER*</p> <p>ADDRESS <i>(Business Address Acceptable)</i></p> <p>BUSINESS ACTIVITY, IF ANY, OF LENDER</p> <p>HIGHEST BALANCE DURING REPORTING PERIOD</p> <p><input type="checkbox"/> \$500 - \$1,000</p> <p><input type="checkbox"/> \$1,001 - \$10,000</p> <p><input type="checkbox"/> \$10,001 - \$100,000</p> <p><input type="checkbox"/> OVER \$100,000</p>	<p>INTEREST RATE                      TERM (Months/Years)</p> <p>_____ %    <input type="checkbox"/> None                      _____</p> <p>SECURITY FOR LOAN</p> <p><input type="checkbox"/> None                      <input type="checkbox"/> Personal residence</p> <p><input type="checkbox"/> Real Property _____ <i>Street address</i></p> <p>_____ <i>City</i></p> <p><input type="checkbox"/> Guarantor _____</p> <p><input type="checkbox"/> Other _____ <i>(Describe)</i></p>
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**Comments:** \_\_\_\_\_

# SCHEDULE C

## Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

**CALIFORNIA FORM 700**

FAIR POLITICAL PRACTICES COMMISSION

Name  
Stephen Juelsgaard

**▶ 1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME  
SFC Eastlake Partners LP

ADDRESS (Business Address Acceptable)  
577 Airport Blvd., Ste. 700, Burlingame, CA 94010

BUSINESS ACTIVITY, IF ANY, OF SOURCE  
Apartment Ownership

YOUR BUSINESS POSITION  
Limited Partner

GROSS INCOME RECEIVED  No Income - Business Position Only

\$500 - \$1,000  \$1,001 - \$10,000

\$10,001 - \$100,000  OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary  Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use  
Schedule A-2.)

Sale of \_\_\_\_\_  
(Real property, car, boat, etc.)

Loan repayment

Commission or  Rental Income, list each source of \$10,000 or more

\_\_\_\_\_  
(Describe)

Other \_\_\_\_\_  
(Describe)

**▶ 1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME  
SFC Stonegate Village Investors LP

ADDRESS (Business Address Acceptable)  
577 Airport Blvd., Ste. 700, Burlingame, CA 94010

BUSINESS ACTIVITY, IF ANY, OF SOURCE  
Apartment Ownership

YOUR BUSINESS POSITION  
Limited Partner

GROSS INCOME RECEIVED  No Income - Business Position Only

\$500 - \$1,000  \$1,001 - \$10,000

\$10,001 - \$100,000  OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary  Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use  
Schedule A-2.)

Sale of \_\_\_\_\_  
(Real property, car, boat, etc.)

Loan repayment

Commission or  Rental Income, list each source of \$10,000 or more

\_\_\_\_\_  
(Describe)

Other \_\_\_\_\_  
(Describe)

**▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD**

\* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000

\$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

INTEREST RATE \_\_\_\_\_%  None

TERM (Months/Years) \_\_\_\_\_

SECURITY FOR LOAN

None  Personal residence

Real Property \_\_\_\_\_  
Street address

\_\_\_\_\_  
City

Guarantor \_\_\_\_\_

Other \_\_\_\_\_  
(Describe)

Comments: \_\_\_\_\_



# SCHEDULE C

## Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name  
Stephen Juelsgaard

**▶ 1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME  
GSO Capital Solutions Fund LP

ADDRESS (Business Address Acceptable)  
560 Mission St. Ste. 2400, San Francisco, CA 94105

BUSINESS ACTIVITY, IF ANY, OF SOURCE  
Business Lending

YOUR BUSINESS POSITION  
Limited Partner

GROSS INCOME RECEIVED     No Income - Business Position Only

\$500 - \$1,000                       \$1,001 - \$10,000

\$10,001 - \$100,000               OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary     Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use  
Schedule A-2.)

Sale of \_\_\_\_\_  
(Real property, car, boat, etc.)

Loan repayment

Commission or     Rental Income, list each source of \$10,000 or more  
\_\_\_\_\_  
(Describe)

Other \_\_\_\_\_  
(Describe)

**▶ 1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME  
GSO Capital Solutions Fund II

ADDRESS (Business Address Acceptable)  
560 Mission St. Ste. 2400, San Francisco, CA 94105

BUSINESS ACTIVITY, IF ANY, OF SOURCE  
Business Lending

YOUR BUSINESS POSITION  
Limited Partner

GROSS INCOME RECEIVED     No Income - Business Position Only

\$500 - \$1,000                       \$1,001 - \$10,000

\$10,001 - \$100,000               OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary     Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use  
Schedule A-2.)

Sale of \_\_\_\_\_  
(Real property, car, boat, etc.)

Loan repayment

Commission or     Rental Income, list each source of \$10,000 or more  
\_\_\_\_\_  
(Describe)

Other \_\_\_\_\_  
(Describe)

**▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD**

\* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000

\$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

INTEREST RATE                      TERM (Months/Years)

\_\_\_\_\_ %     None                      \_\_\_\_\_

SECURITY FOR LOAN

None                       Personal residence

Real Property \_\_\_\_\_  
Street address

\_\_\_\_\_ City

Guarantor \_\_\_\_\_

Other \_\_\_\_\_  
(Describe)

Comments: \_\_\_\_\_

# SCHEDULE C

## Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name  
Stephen Juelsgaard

**▶ 1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME  
Starwood Opportunity Fund VIII LP

ADDRESS (Business Address Acceptable)  
560 Mission St. Ste. 2400, San Francisco, CA 94105

BUSINESS ACTIVITY, IF ANY, OF SOURCE  
Real Estate Investing

YOUR BUSINESS POSITION  
Limited Partner

GROSS INCOME RECEIVED  No Income - Business Position Only  
 \$500 - \$1,000  \$1,001 - \$10,000  
 \$10,001 - \$100,000  OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED  
 Salary  Spouse's or registered domestic partner's income  
 (For self-employed use Schedule A-2.)  
 Partnership (Less than 10% ownership. For 10% or greater use  
 Schedule A-2.)  
 Sale of \_\_\_\_\_  
 (Real property, car, boat, etc.)  
 Loan repayment  
 Commission or  Rental Income, list each source of \$10,000 or more  
 \_\_\_\_\_  
 (Describe)  
 Other \_\_\_\_\_  
 (Describe)

**▶ 1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME  
Starwood Opportunity Fund IX LP

ADDRESS (Business Address Acceptable)  
560 Mission St. Ste. 2400, San Francisco, CA 94105

BUSINESS ACTIVITY, IF ANY, OF SOURCE  
Real Estate Investing

YOUR BUSINESS POSITION  
Limited Partner

GROSS INCOME RECEIVED  No Income - Business Position Only  
 \$500 - \$1,000  \$1,001 - \$10,000  
 \$10,001 - \$100,000  OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED  
 Salary  Spouse's or registered domestic partner's income  
 (For self-employed use Schedule A-2.)  
 Partnership (Less than 10% ownership. For 10% or greater use  
 Schedule A-2.)  
 Sale of \_\_\_\_\_  
 (Real property, car, boat, etc.)  
 Loan repayment  
 Commission or  Rental Income, list each source of \$10,000 or more  
 \_\_\_\_\_  
 (Describe)  
 Other \_\_\_\_\_  
 (Describe)

**▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD**

\* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD  
 \$500 - \$1,000  
 \$1,001 - \$10,000  
 \$10,001 - \$100,000  
 OVER \$100,000

INTEREST RATE \_\_\_\_\_%  None

TERM (Months/Years) \_\_\_\_\_

SECURITY FOR LOAN  
 None  Personal residence  
 Real Property \_\_\_\_\_  
 Street address \_\_\_\_\_  
 City \_\_\_\_\_  
 Guarantor \_\_\_\_\_  
 Other \_\_\_\_\_  
 (Describe)

Comments: \_\_\_\_\_

# SCHEDULE C

## Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

**CALIFORNIA FORM 700**

FAIR POLITICAL PRACTICES COMMISSION

Name

Stephen Juelsgaard

**1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME  
FT Ventures III LP

ADDRESS (Business Address Acceptable)  
555 California St., Ste. 2900, San Francisco, CA 941

BUSINESS ACTIVITY, IF ANY, OF SOURCE  
Financial Services Investing

YOUR BUSINESS POSITION  
Limited Partner

GROSS INCOME RECEIVED  No Income - Business Position Only

\$500 - \$1,000       \$1,001 - \$10,000

\$10,001 - \$100,000       OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary     Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use  
Schedule A-2.)

Sale of \_\_\_\_\_  
*(Real property, car, boat, etc.)*

Loan repayment

Commission or     Rental Income, list each source of \$10,000 or more

*(Describe)*

Other \_\_\_\_\_  
*(Describe)*

**1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME  
FT Ventures IV LP

ADDRESS (Business Address Acceptable)  
555 California St., Ste. 2900, San Francisco, CA 941

BUSINESS ACTIVITY, IF ANY, OF SOURCE  
Financial Services Investing

YOUR BUSINESS POSITION  
Limited Partner

GROSS INCOME RECEIVED  No Income - Business Position Only

\$500 - \$1,000       \$1,001 - \$10,000

\$10,001 - \$100,000       OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

Salary     Spouse's or registered domestic partner's income  
(For self-employed use Schedule A-2.)

Partnership (Less than 10% ownership. For 10% or greater use  
Schedule A-2.)

Sale of \_\_\_\_\_  
*(Real property, car, boat, etc.)*

Loan repayment

Commission or     Rental Income, list each source of \$10,000 or more

*(Describe)*

Other \_\_\_\_\_  
*(Describe)*

**2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD**

\* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000

\$1,001 - \$10,000

\$10,001 - \$100,000

OVER \$100,000

INTEREST RATE      TERM (Months/Years)

\_\_\_\_\_ %     None      \_\_\_\_\_

SECURITY FOR LOAN

None       Personal residence

Real Property \_\_\_\_\_  
*Street address*

\_\_\_\_\_ *City*

Guarantor \_\_\_\_\_

Other \_\_\_\_\_  
*(Describe)*

Comments: \_\_\_\_\_

# SCHEDULE C

## Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

<b>CALIFORNIA FORM 700</b>
<small>FAIR POLITICAL PRACTICES COMMISSION</small>
Name <u>Stephen Juelsgaard</u>

▶ 1. INCOME RECEIVED	▶ 1. INCOME RECEIVED
<p>NAME OF SOURCE OF INCOME <u>Avista Capital Opportunities LP</u></p> <p>ADDRESS (Business Address Acceptable) <u>535 Cowper St., 3rd Floor, Palo Alto, CA 94301</u></p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Private Equity Investments</u></p> <p>YOUR BUSINESS POSITION <u>Limited Partner</u></p> <p>GROSS INCOME RECEIVED    <input type="checkbox"/> No Income - Business Position Only</p> <p><input type="checkbox"/> \$500 - \$1,000                      <input type="checkbox"/> \$1,001 - \$10,000</p> <p><input checked="" type="checkbox"/> \$10,001 - \$100,000              <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED</p> <p><input type="checkbox"/> Salary    <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)</p> <p><input checked="" type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ <span style="margin-left: 150px;"><small>(Real property, car, boat, etc.)</small></span></p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or    <input type="checkbox"/> Rental Income, list each source of \$10,000 or more</p> <p style="text-align: center;"><small>(Describe)</small></p> <p><input type="checkbox"/> Other _____ <span style="margin-left: 150px;"><small>(Describe)</small></span></p>	<p>NAME OF SOURCE OF INCOME <u>Private Equity Opportunities Onshore Feeder Fund</u></p> <p>ADDRESS (Business Address Acceptable) <u>535 Cowper St., 3rd Floor, Palo Alto, CA 94301</u></p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Private Equity Investments</u></p> <p>YOUR BUSINESS POSITION <u>Limited Partner</u></p> <p>GROSS INCOME RECEIVED    <input type="checkbox"/> No Income - Business Position Only</p> <p><input type="checkbox"/> \$500 - \$1,000                      <input type="checkbox"/> \$1,001 - \$10,000</p> <p><input checked="" type="checkbox"/> \$10,001 - \$100,000              <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED</p> <p><input type="checkbox"/> Salary    <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)</p> <p><input checked="" type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ <span style="margin-left: 150px;"><small>(Real property, car, boat, etc.)</small></span></p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or    <input type="checkbox"/> Rental Income, list each source of \$10,000 or more</p> <p style="text-align: center;"><small>(Describe)</small></p> <p><input type="checkbox"/> Other _____ <span style="margin-left: 150px;"><small>(Describe)</small></span></p>

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD	
<p>* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:</p>	
<p>NAME OF LENDER* _____</p> <p>ADDRESS (Business Address Acceptable) _____</p> <p>BUSINESS ACTIVITY, IF ANY, OF LENDER _____</p> <p>HIGHEST BALANCE DURING REPORTING PERIOD</p> <p><input type="checkbox"/> \$500 - \$1,000</p> <p><input type="checkbox"/> \$1,001 - \$10,000</p> <p><input type="checkbox"/> \$10,001 - \$100,000</p> <p><input type="checkbox"/> OVER \$100,000</p>	<p>INTEREST RATE                      TERM (Months/Years)</p> <p>_____ %    <input type="checkbox"/> None                      _____</p> <p>SECURITY FOR LOAN</p> <p><input type="checkbox"/> None                      <input type="checkbox"/> Personal residence</p> <p><input type="checkbox"/> Real Property _____ <span style="margin-left: 150px;"><small>Street address</small></span></p> <p style="text-align: center;"><small>City</small></p> <p><input type="checkbox"/> Guarantor _____</p> <p><input type="checkbox"/> Other _____ <span style="margin-left: 150px;"><small>(Describe)</small></span></p>
<p>Comments: _____</p>	

# SCHEDULE C

## Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

Name  
Stephen Juelsgaard

**▶ 1. INCOME RECEIVED** **▶ 1. INCOME RECEIVED**

NAME OF SOURCE OF INCOME  
TRG Growth Partnership

ADDRESS (Business Address Acceptable)  
535 Cowper St., 3rd Floor, Palo Alto, CA 94301

BUSINESS ACTIVITY, IF ANY, OF SOURCE  
Private Equity Investing

YOUR BUSINESS POSITION  
Limited Partner

GROSS INCOME RECEIVED  No Income - Business Position Only  
 \$500 - \$1,000  \$1,001 - \$10,000  
 \$10,001 - \$100,000  OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED  
 Salary  Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)  
 Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)  
 Sale of \_\_\_\_\_ (Real property, car, boat, etc.)  
 Loan repayment  
 Commission or  Rental Income, list each source of \$10,000 or more  
\_\_\_\_\_  
(Describe)  
 Other \_\_\_\_\_  
(Describe)

NAME OF SOURCE OF INCOME  
CRP Opportunities Fund LP

ADDRESS (Business Address Acceptable)  
535 Cowper St., 3rd Floor, Palo Alto, CA 94301

BUSINESS ACTIVITY, IF ANY, OF SOURCE  
Real Estate Investing

YOUR BUSINESS POSITION  
Limited Partner

GROSS INCOME RECEIVED  No Income - Business Position Only  
 \$500 - \$1,000  \$1,001 - \$10,000  
 \$10,001 - \$100,000  OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED  
 Salary  Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)  
 Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)  
 Sale of \_\_\_\_\_ (Real property, car, boat, etc.)  
 Loan repayment  
 Commission or  Rental Income, list each source of \$10,000 or more  
\_\_\_\_\_  
(Describe)  
 Other \_\_\_\_\_  
(Describe)

**▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD**

\* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\* \_\_\_\_\_

ADDRESS (Business Address Acceptable) \_\_\_\_\_

BUSINESS ACTIVITY, IF ANY, OF LENDER \_\_\_\_\_

HIGHEST BALANCE DURING REPORTING PERIOD  
 \$500 - \$1,000  
 \$1,001 - \$10,000  
 \$10,001 - \$100,000  
 OVER \$100,000

INTEREST RATE \_\_\_\_\_%  None

TERM (Months/Years) \_\_\_\_\_

SECURITY FOR LOAN  
 None  Personal residence  
 Real Property \_\_\_\_\_  
Street address \_\_\_\_\_  
City \_\_\_\_\_  
 Guarantor \_\_\_\_\_  
 Other \_\_\_\_\_  
(Describe)

Comments: \_\_\_\_\_