

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Please type or print in ink.

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

1. Office, Agency, or Court

Agency Name (Do not use acronyms)
California Institute for Regenerative Medicine

Division, Board, Department, District, if applicable Your Position
Member of Independent Citizens' Oversight Committee

► 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, 2021, through December 31, 2021. Leaving Office: Date Left ____/____/____ (Check one circle.)
- or- The period covered is ____/____/____, through The period covered is January 1, 2021, through the date of leaving office.
- Assuming Office: Date assumed ____/____/____ -or- The period covered is ____/____/____, through the date of leaving office.
- Candidate: Date of Election _____ and office sought, if different than Part 1: _____

4. Schedule Summary (must complete) ► Total number of pages including this cover page: 34

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 15, 2022 Signature Stephen Juelsgaard
(month, day, year) (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.*

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

▶ NAME OF BUSINESS ENTITY
Starwood Opportunity Fund VIII

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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Starwood Opportunity Fund IX

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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Blackstone 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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
GSO Capital Solutions Fund 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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
HPS - Core Senior lending Fund

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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Apollo EPF III Private Investors

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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

Comments: _____

Print **Clear**

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 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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
SFC Park Knolls 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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
SFC Eastlake Investors

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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
SFC Stonegate Village 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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
FT Ventures III

GENERAL DESCRIPTION OF THIS BUSINESS
Financial Services 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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
FT Ventures IV

GENERAL DESCRIPTION OF THIS BUSINESS
Financial Services 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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

Comments: _____

Print

Clear

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:
____/____/21 ____/____/21
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
DGP 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:
____/____/21 ____/____/21
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Dyal Capital Partners V Onshore 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:
____/____/21 ____/____/21
ACQUIRED DISPOSED

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

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:
____/____/21 ____/____/21
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Private Equity Opportunities Onshore Feeder Fund 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:
____/____/21 ____/____/21
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
TRG Growth Partnership

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:
____/____/21 ____/____/21
ACQUIRED DISPOSED

Comments: _____

Print **Clear**

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.

CALIFORNIA FORM **700**

FAIR POLITICAL PRACTICES COMMISSION

Name

Stephen Juelsgaard

▶ 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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
CMMO Crestline Onshore Feeder Fund LP

GENERAL DESCRIPTION OF THIS BUSINESS
Credit and 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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
NGT II Onshore Feeder Fund 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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

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
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IF APPLICABLE, LIST DATE:
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 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

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
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IF APPLICABLE, LIST DATE:
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 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

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:
 _____/_____/21 _____/_____/21
 ACQUIRED DISPOSED

Comments:

Print **Clear**

**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
ACCENTURE PLC	Information Technology	\$2,000-\$10,000	Common Stock
ADOBE INC	Information Technology	\$2,000-\$10,000	Common Stock
ADVANCED MICRO DEVICES INC	Information Technology	\$10,000-\$1,000,000	Common Stock
AFLAC INC	Financials	\$2,000-\$10,000	Common Stock
AIR PRODUCTS & CHEMICALS INC	Materials	\$2,000-\$10,000	Common Stock
ALIGN TECHNOLOGY INC	Health Care	\$2,000-\$10,000	Common Stock
ALLEGION PLC	Industrials	\$2,000-\$10,000	Common Stock
ALLSTATE CORP	Financials	\$2,000-\$10,000	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
AMAZON COM INC	Information Technology	\$10,000-\$100,000	Common Stock
AMERICAN ELECTRIC POWER CO INC	Utilities	\$2,000-\$10,000	Common Stock
AMERICAN EXPRESS CO	Financials	\$2,000-\$10,000	Common Stock
AMERICAN TOWER CORP	Real Estate	\$10,000-\$100,000	Common Stock
AMERIPRISE FINANCIAL INC	Financials	\$10,000-\$100,000	Common Stock
AMERISOURCEBERGEN CORP	Health Care	\$2,000-\$10,000	Common Stock
AMERRA Agri Fund II, L.P.	Other	\$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

**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
AON PLC	Financials	\$10,000-\$100,000	Common Stock
APA CORP	Energy	\$2,000-\$10,000	Common Stock
APPLE INC	Information Technology	\$100,000-\$1,000,000	Common Stock
APPLIED MATERIALS INC	Information Technology	\$10,000-\$100,000	Common Stock
APTIV PLC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
ARCHER-DANIELS-MIDLAND CO	Consumer Staples	\$2,000-\$10,000	Common Stock
Asia Enterprise III Onshore LP CI B	Other	\$10,000-\$100,000	Partnership
AT&T INC	Communication	\$2,000-\$10,000	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 Capital Opportunities Fund II (Onshc	Other	\$10,000-\$100,000	Partnership
BAKER HUGHES CO	Energy	\$2,000-\$10,000	Common Stock
BALL CORP	Industrials	\$2,000-\$10,000	Common Stock
BANK OF AMERICA CORP	Financials	\$10,000-\$100,000	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
BECTON DICKINSON AND CO	Health Care	\$10,000-\$100,000	Common Stock
BERKSHIRE HATHAWAY INC CL B	Financials	\$10,000-\$100,000	Common Stock
BIOGEN INC	Health Care	\$2,000-\$10,000	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	\$10,000-\$100,000	Common Stock
BROADCOM INC	Information Technology	\$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
CATERPILLAR INC	Industrials	\$10,000-\$100,000	Common Stock
CBRE GROUP INC	Real Estate	\$2,000-\$10,000	Common Stock
CERNER CORP	Information Technology	\$2,000-\$10,000	Common Stock
CHARTER COMMUNICATIONS INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
CHEVRON CORP	Energy	\$2,000-\$10,000	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 CO/THE	Consumer Staples	\$2,000-\$10,000	Common Stock
CME GROUP INC	Financials	\$10,000-\$100,000	Common Stock
CMMO Onshore Feeder Fd L.P. Crestline	Other	\$100,000-\$1,000,000	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	\$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
CROWN CASTLE INTERNATIONAL	Real Estate	\$2,000-\$10,000	Common Stock
CRP Opportunities Fund (Onshore) LP Cl E	Other	\$10,000-\$100,000	Partnership
CSX CORP	Industrials	\$2,000-\$10,000	Common Stock
CVS HEALTH CORP	Health Care	\$2,000-\$10,000	Common Stock
DANAHER CORP	Health Care	\$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
DAVITA INC	Health Care	\$2,000-\$10,000	Common Stock
DEERE & CO	Industrials	\$2,000-\$10,000	Common Stock
DEVON ENERGY CORP NEW	Energy	\$2,000-\$10,000	Common Stock
DGP IV Ownership Onshore Feeder Fund,	Other	\$100,000-\$1,000,000	Partnership
DIAMONDBACK ENERGY INC	Energy	\$2,000-\$10,000	Common Stock
DOW INC	Materials	\$2,000-\$10,000	Common Stock
Dyal Capital Partners V Onshore LP C (in L	Other	\$100,000-\$1,000,000	Partnership
EASTMAN CHEMICAL CO	Materials	\$2,000-\$10,000	Common Stock
EATON CORP PLC	Industrials	\$2,000-\$10,000	Common Stock
EBAY INC	Information Technology	\$2,000-\$10,000	Common Stock
ECOLAB INC	Materials	\$2,000-\$10,000	Common Stock
ELI LILLY & CO	Health Care	\$10,000-\$100,000	Common Stock
EOG RESOURCES INC	Energy	\$2,000-\$10,000	Common Stock
EQUIFAX INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
ESTEE LAUDER COS INC CL A	Consumer Staples	\$2,000-\$10,000	Common Stock
EXPEDIA GROUP INC	Information Technology	\$2,000-\$10,000	Common Stock
EXXON MOBIL CORP	Energy	\$2,000-\$10,000	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
FORTINET INC	Information Technology	\$2,000-\$10,000	Common Stock
FORTIVE CORP	Industrials	\$2,000-\$10,000	Common Stock
GARTNER INC NEW	Consumer Discretionary	\$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
GILEAD SCIENCES INC	Health Care	\$10,000-\$100,000	Common Stock
GOLDMAN SACHS GROUP INC	Financials	\$2,000-\$10,000	Common Stock
HALLIBURTON CO HOLDINGS CO	Energy	\$2,000-\$10,000	Common Stock
HCA HEALTHCARE INC	Health Care	\$2,000-\$10,000	Common Stock
HEWLETT PACKARD ENTERPRISE CO	Information Technology	\$2,000-\$10,000	Common Stock
HH Pre-IPO Onshore Feeder Fund II, L.P.	Other	\$100,000-\$1,000,000	Partnership
HOME DEPOT INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
HONEYWELL INTERNATIONAL INC	Industrials	\$10,000-\$100,000	Common Stock
HP INC	Information Technology	\$2,000-\$10,000	Common Stock
ILLINOIS TOOL WORKS INC	Industrials	\$10,000-\$100,000	Common Stock
INGERSOLL RAND INC	Industrials	\$2,000-\$10,000	Common Stock
INTEL CORP	Information Technology	\$10,000-\$100,000	Common Stock
INTERCONTINENTAL EXCHANGE INC	Financials	\$2,000-\$10,000	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	\$2,000-\$10,000	Common Stock
KIMCO REALTY CORPOR	Real Estate	\$2,000-\$10,000	Common Stock
KROGER CO/THE	Consumer Staples	\$2,000-\$10,000	Common Stock
L3HARRIS TECHNOLOGIES INC	Industrials	\$2,000-\$10,000	Common Stock
LAM RESEARCH CORP	Information Technology	\$10,000-\$100,000	Common Stock
LEIDOS HOLDINGS INC	Information Technology	\$2,000-\$10,000	Common Stock
LENNAR CORP	Consumer Discretionary	\$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
LINCOLN NATIONAL CORP -IND-	Financials	\$2,000-\$10,000	Common Stock
LINDE PLC	Materials	\$2,000-\$10,000	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 INTERNATIONAL INC/MD	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
MATCH GROUP INC	Information Technology	\$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
META PLATFORMS INC-CLASS A	Information Technology	\$10,000-\$100,000	Common Stock
MICROCHIP TECHNOLOGY INC	Information Technology	\$2,000-\$10,000	Common Stock
MICROSOFT CORP	Information Technology	\$2,000-\$10,000	Common Stock
MONDELEZ INTERNATIONAL	Consumer Staples	\$100,000-\$1,000,000	Common Stock
MOODY'S CORP	Consumer Discretionary	\$10,000-\$100,000	Common Stock
MORGAN STANLEY	Consumer Discretionary	\$10,000-\$100,000	Common Stock
MOTOROLA SOLUTIONS INC	Financials	\$2,000-\$10,000	Common Stock
NETFLIX INC	Information Technology	\$2,000-\$10,000	Common Stock
NEWMONT CORPORATION	Information Technology	\$2,000-\$10,000	Common Stock
NEWS CORP/NEW-CL A-	Materials	\$2,000-\$10,000	Common Stock
NEXTERA ENERGY INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
NGT II Onshore Feeder Fund, L.P. Series I	Utilities	\$10,000-\$100,000	Common Stock
NIKE INC CL B	Other	\$100,000-\$1,000,000	Partnership
	Consumer Discretionary	\$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
NISOURCE INC	Utilities	\$2,000-\$10,000	Common Stock
NORFOLK SOUTHERN CORP	Industrials	\$2,000-\$10,000	Common Stock
NORTHROP GRUMMAN CORP	Industrials	\$10,000-\$100,000	Common Stock
NRG ENERGY INC	Utilities	\$2,000-\$10,000	Common Stock
NUCOR CORP	Materials	\$2,000-\$10,000	Common Stock
NVIDIA CORP	Information Technology	\$10,000-\$100,000	Common Stock
Partners Group Real Estate Secondary LP	Other	\$100,000-\$1,000,000	Partnership
PAYCHEX INC	Information Technology	\$2,000-\$10,000	Common Stock
PAYPAL HOLDINGS INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
PEPSICO INC	Consumer Staples	\$10,000-\$100,000	Common Stock
PERKINELMER INC	Health Care	\$2,000-\$10,000	Common Stock
PFIZER INC	Health Care	\$10,000-\$100,000	Common Stock
PHILLIPS 66	Energy	\$2,000-\$10,000	Common Stock
PPG INDUSTRIES INC	Materials	\$2,000-\$10,000	Common Stock
Private Equity Opportunities (PPV) Onshore	Other	\$100,000-\$1,000,000	Partnership
PRO LOGIS INC	Real Estate	\$10,000-\$100,000	Common Stock
PROCTER & GAMBLE CO/THE	Consumer Staples	\$10,000-\$100,000	Common Stock
PRUDENTIAL FINANCIAL INC	Financials	\$2,000-\$10,000	Common Stock
QUALCOMM INC	Information Technology	\$2,000-\$10,000	Common Stock
QUEST DIAGNOSTICS INC	Health Care	\$2,000-\$10,000	Common Stock
REGENCY CENTERS CORP	Real Estate	\$2,000-\$10,000	Common Stock
REGIONS FINANCIAL CORP	Financials	\$2,000-\$10,000	Common Stock
S&P GLOBAL INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
SALESFORCE.COM INC	Information Technology	\$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
SCHLUMBERGER LTD	Energy	\$2,000-\$10,000	Common Stock
SCHWAB CHARLES CORP	Financials	\$10,000-\$100,000	Common Stock
SEAGATE TECHNOLOGY HOLDING	Information Technology	\$2,000-\$10,000	Common Stock
SEMPRA ENERGY	Utilities	\$2,000-\$10,000	Common Stock
SERVICENOW INC	Information Technology	\$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
STARBUCKS CORP	Consumer Discretionary	\$10,000-\$100,000	Common Stock
STRYKER CORP	Health Care	\$2,000-\$10,000	Common Stock
SVB FINANCIAL GROUP INC	Financials	\$2,000-\$10,000	Common Stock
T MOBILE US INC	Communication	\$2,000-\$10,000	Common Stock
TARGET CORP	Consumer Discretionary	\$2,000-\$10,000	Common Stock
TESLA INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
TEXAS INSTRUMENTS INC	Information Technology	\$10,000-\$100,000	Common Stock
TF Capital Investors II LP CI A	Other	\$2,000-\$10,000	Partnership
THE MOSAIC COMPANY	Materials	\$2,000-\$10,000	Common Stock
THERMO FISHER SCIENTIFIC INC	Health Care	\$2,000-\$10,000	Common Stock
TJX COMPANIES INC NEW	Consumer Discretionary	\$10,000-\$100,000	Common Stock
TRANE TECHNOLOGIES PLC	Industrials	\$10,000-\$100,000	Common Stock
TRG Growth Partnership (Cayman Onshore)	Other	\$10,000-\$100,000	Common Stock
TRUIST FINANCIAL CORP	Financials	\$100,000-\$1,000,000	Partnership
TYSON FOODS INC	Financials	\$10,000-\$100,000	Common Stock
UNION PACIFIC CORP	Consumer Staples	\$2,000-\$10,000	Common Stock
UNITEDHEALTH GROUP INC	Industrials	\$10,000-\$100,000	Common Stock
	Health Care	\$10,000-\$100,000	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
VALERO ENERGY CORP-NEW	Energy	\$2,000-\$10,000	Common Stock
VERIZON COMMUNICATIONS	Communication	\$10,000-\$100,000	Common Stock
VISA INC COM CL A	Financials	\$10,000-\$100,000	Common Stock
WALMART INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
WALT DISNEY CO	Consumer Discretionary	\$10,000-\$100,000	Common Stock
WATERS CORP	Health Care	\$2,000-\$10,000	Common Stock
WELLS FARGO & CO NEW	Financials	\$2,000-\$10,000	Common Stock
WESTROCK CO	Industrials	\$2,000-\$10,000	Common Stock
WEYERHAEUSER CO	Real Estate	\$2,000-\$10,000	Common Stock
WHIRLPOOL CORP	Consumer Discretionary	\$2,000-\$10,000	Common Stock
ZIONS BANCORP NA	Financials	\$2,000-\$10,000	Common Stock
ZOETIS INC	Health Care	\$2,000-\$10,000	Common Stock

**Schedule A-1
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Asset Detail December 31, 2021 Holdings JUELSGAARD S. TTEE JUELSGAARD TR-IMA			
Name of Business Entity	General Description of Business Activity	Market Value	Nature of Investment
ABBOTT LABORATORIES	Healthcare	\$10,001-\$100,000	Common Stock
ABBVIE INC.	Healthcare	\$0-\$10,000	Common Stock
ACCENTURE PLC	Information Technology	\$10,001-\$100,000	Common Stock
ADOBE SYSTEMS INC	Information Technology	\$10,001-\$100,000	Common Stock
ADVANCED MICRO DEVICES INC	Information Technology	\$10,001-\$100,000	Common Stock
AIR PRODUCTS & CHEMICALS INC	Materials	\$0-\$10,000	Common Stock
ALIGN TECHNOLOGY INC	Healthcare	\$0-\$10,000	Common Stock
ALPHABET, INC.	Telecommunications Services	\$10,001-\$100,000	Common Stock
ALPHABET, INC.	Telecommunications Services	\$10,001-\$100,000	Common Stock
ALTRIA GROUP INC	Consumer Staples	\$0-\$10,000	Common Stock
AMAZON.COM INC	Consumer Discretionary	\$10,001-\$100,000	Common Stock
AMERICAN EXPRESS COMPANY	Financials	\$10,001-\$100,000	Common Stock
AMGEN INC	Healthcare	\$10,001-\$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
APPLE INC	Information Technology	\$10,001-\$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
ASTRAZENECA PLC SPONSORED ADR	Healthcare	\$0-\$10,000	Common Stock
BANK OF AMERICA CORPORATION	Financials	\$10,001-\$100,000	Common Stock
BERKSHIRE HATHAWAY INC DEL CL B	Financials	\$10,001-\$100,000	Common Stock
BEST BUY INC	Consumer Discretionary	\$0-\$10,000	Common Stock
BRISTOL-MYERS SQUIBB COMPANY	Healthcare	\$0-\$10,000	Common Stock
BROADCOM INC	Information Technology	\$10,001-\$100,000	Common Stock
CARMAX INC	Consumer Discretionary	\$0-\$10,000	Common Stock
CARRIER GLOBAL CORPORATION	Industrials	\$0-\$10,000	Common Stock
CELANESE CORP	Materials	\$0-\$10,000	Common Stock
CENTENE CORP DEL	Healthcare	\$0-\$10,000	Common Stock
CHURCH & DWIGHT INC	Consumer Staples	\$0-\$10,000	Common Stock
CIGNA CORPORATION	Healthcare	\$0-\$10,000	Common Stock
CISCO SYSTEMS INC	Information Technology	\$0-\$10,000	Common Stock
CLOROX CO	Consumer Staples	\$0-\$10,000	Common Stock
CONAGRA INC	Consumer Staples	\$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
CVS HEALTH CORPORATION	Healthcare	\$0-\$10,000	Common Stock
D R HORTON INC	Consumer Discretionary	\$0-\$10,000	Common Stock
DANAHER CORP	Healthcare	\$10,001-\$100,000	Common Stock
DOVER CORP	Industrials	\$0-\$10,000	Common Stock
DOW INC.	Materials	\$0-\$10,000	Common Stock
EATON CORP PLC	Industrials	\$0-\$10,000	Common Stock
EDWARDS LIFESCIENCES CORP	Healthcare	\$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
EXELON CORP	Utilities	\$0-\$10,000	Common Stock
EXPEDIA,INC.	Consumer Discretionary	\$0-\$10,000	Common Stock

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Name of Business Entity	General Description of Business Activity	Market Value	Nature of Investment
FACEBOOK INC.	Telecommunications Services	\$0-\$10,000	Common Stock
FORD MOTOR COMPANY	Consumer Discretionary	\$0-\$10,000	Common Stock
FORTIVE CORP.	Industrials	\$0-\$10,000	Common Stock
FREEPORT MCMORAN COPPER & GOLD INC	Materials	\$0-\$10,000	Common Stock
GARMIN LTD	Consumer Discretionary	\$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
HOLOGIC INC	Healthcare	\$0-\$10,000	Common Stock
HOME DEPOT INC	Consumer Discretionary	\$10,001-\$100,000	Common Stock
HONEYWELL INTL INC	Industrials	\$0-\$10,000	Common Stock
HUMANA INC	Healthcare	\$0-\$10,000	Common Stock
IDEX CORP	Industrials	\$0-\$10,000	Common Stock
ILLUMINA INC	Healthcare	\$0-\$10,000	Common Stock
INCYTE CORPORATION	Healthcare	\$0-\$10,000	Common Stock
INTUITIVE SURGICAL INC	Healthcare	\$0-\$10,000	Common Stock
INVESCO LIMITED	Financials	\$0-\$10,000	Common Stock
JOHNSON & JOHNSON	Healthcare	\$10,001-\$100,000	Common Stock
JP MORGAN CHASE & CO	Financials	\$10,001-\$100,000	Common Stock
K L A - TENCOR CORP	Information Technology	\$0-\$10,000	Common Stock
LAM RESH CORP	Information Technology	\$0-\$10,000	Common Stock
LILLY ELI & CO	Healthcare	\$0-\$10,000	Common Stock
LOCKHEED MARTIN CORP	Industrials	\$10,001-\$100,000	Common Stock
LOWE'S COMPANIES INC	Consumer Discretionary	\$10,001-\$100,000	Common Stock
MARKETAXESS HLDGS INC	Financials	\$0-\$10,000	Common Stock
MARTIN MARIETTA MATLS INC	Materials	\$0-\$10,000	Common Stock
MEDTRONIC, PLC ADR	Healthcare	\$0-\$10,000	Common Stock
METLIFE INC	Financials	\$0-\$10,000	Common Stock
MICROSOFT CORPORATION	Information Technology	\$100,001-\$1,000,000	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
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	\$10,001-\$100,000	Common Stock
NORFOLK SOUTHERN CORPORATION	Industrials	\$10,001-\$100,000	Common Stock
NVIDIA CORP	Information Technology	\$10,001-\$100,000	Common Stock
PACCAR INC	Industrials	\$0-\$10,000	Common Stock
PARKER HANNIFIN CORP	Industrials	\$0-\$10,000	Common Stock
PAYPAL HOLDINGS, INC.	Information Technology	\$10,001-\$100,000	Common Stock
PENTAIR PLC	Industrials	\$0-\$10,000	Common Stock
PEPSICO INC	Consumer Staples	\$10,001-\$100,000	Common Stock
PFIZER INC	Healthcare	\$10,001-\$100,000	Common Stock
PROLOGIS, INC.	Real Estate	\$0-\$10,000	Common Stock
PUBLIC STORAGE INC REIT	Real Estate	\$10,001-\$100,000	Common Stock
Q O R V O INC,	Information Technology	\$0-\$10,000	Common Stock
QUALCOMM INC	Information Technology	\$10,001-\$100,000	Common Stock
QUANTA SVCS INC	Industrials	\$0-\$10,000	Common Stock
REGENERON PHARMACEUTICALS INC	Healthcare	\$0-\$10,000	Common Stock
ROCKWELL AUTOMATION INC	Industrials	\$0-\$10,000	Common Stock
ROPER INDUSTRIES INC	Industrials	\$0-\$10,000	Common Stock

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**Name
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Name of Business Entity	General Description of Business Activity	Market Value	Nature of Investment
S & P GLOBAL INC.	Financials	\$10,001-\$100,000	Common Stock
S B A COMMUNICATIONS CORPORATION	Real Estate	\$0-\$10,000	Common Stock
SALESFORCE.COM INC	Information Technology	\$10,001-\$100,000	Common Stock
SHERWIN WILLIAMS CO	Materials	\$0-\$10,000	Common Stock
SKYWORKS SOLUTIONS INC	Information Technology	\$0-\$10,000	Common Stock
STARBUCKS CORP	Consumer Discretionary	\$10,001-\$100,000	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	\$0-\$10,000	Common Stock
THE KRAFT HEINZ COMPANY	Consumer Staples	\$0-\$10,000	Common Stock
THE PROCTER & GAMBLE COMPANY	Consumer Staples	\$10,001-\$100,000	Common Stock
TORCHMARK CORPORATION	Financials	\$0-\$10,000	Common Stock
TRANE TECHNOLOGIES PUBLIC LIMITED CO	Industrials	\$0-\$10,000	Common Stock
UNION PAC CORP	Industrials	\$10,001-\$100,000	Common Stock
UNITED PARCEL SERVICE CL B	Industrials	\$10,001-\$100,000	Common Stock
UNITEDHEALTH GROUP INC	Healthcare	\$10,001-\$100,000	Common Stock
VERTEX PHARMACEUTICALS INC	Healthcare	\$0-\$10,000	Common Stock
VIATRIS INC	Healthcare	\$0-\$10,000	Common Stock
VISA INC-CLASS A SHRS	Information Technology	\$10,001-\$100,000	Common Stock
WAL MART STORES INC	Consumer Staples	\$10,001-\$100,000	Common Stock
WEYERHAEUSER COMPANY	Real Estate	\$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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December 31, 2021 Holdings JUELSGAARD TTEE JUELSGAARD-IMA-SUB			
Name of Business Entity	General Description of Business Activity	Market Value	Nature of Investment
ABBVIE INC.	Healthcare	\$0-\$10,000	Common Stock
ADVANCED MICRO DEVICES INC	Information Technology	\$10,001-\$100,000	Common Stock
AIR PRODUCTS & CHEMICALS INC	Materials	\$0-\$10,000	Common Stock
ALPHABET, INC.	Telecommunications Services	\$10,001-\$100,000	Common Stock
AMERICAN INTERNATIONAL GROUP INC	Financials	\$10,001-\$100,000	Common Stock
AMERICAN TOWER CORPORATION	Real Estate	\$0-\$10,000	Common Stock
APPLE INC	Information Technology	\$10,001-\$100,000	Common Stock
ATLASSIAN CORPORATION PLC	Information Technology	\$0-\$10,000	Common Stock
BOSTON SCIENTIFIC CORPORATION	Healthcare	\$0-\$10,000	Common Stock
CHEVRON CORPORATION	Energy	\$10,001-\$100,000	Common Stock
CME GROUP INC	Financials	\$0-\$10,000	Common Stock
COCA - COLA CO	Consumer Staples	\$0-\$10,000	Common Stock
COMCAST CORP CL A	Telecommunications Services	\$0-\$10,000	Common Stock
DEERE & CO	Industrials	\$0-\$10,000	Common Stock
EATON CORP PLC	Industrials	\$0-\$10,000	Common Stock
ELECTRONIC ARTS INC	Telecommunications Services	\$0-\$10,000	Common Stock
GENERAL MOTORS CO	Consumer Discretionary	\$0-\$10,000	Common Stock
HONEYWELL INTL INC	Industrials	\$0-\$10,000	Common Stock
LAM RESH CORP	Information Technology	\$0-\$10,000	Common Stock
MICROSOFT CORPORATION	Information Technology	\$10,001-\$100,000	Common Stock
NEXTERA ENERGY INC	Utilities	\$0-\$10,000	Common Stock
NIKE INC CLASS B STOCK	Consumer Discretionary	\$0-\$10,000	Common Stock
NVIDIA CORP	Information Technology	\$10,001-\$100,000	Common Stock
PAYPAL HOLDINGS, INC.	Information Technology	\$0-\$10,000	Common Stock
SQUARE, INC.	Information Technology	\$0-\$10,000	Common Stock
THE PROCTER & GAMBLE COMPANY	Consumer Staples	\$0-\$10,000	Common Stock
TRUIST FINL CORP	Financials	\$0-\$10,000	Common Stock
UNITEDHEALTH GROUP INC	Healthcare	\$10,001-\$100,000	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
JPMORGAN CHASE & CO	Financials	\$2,000-\$10,000	Common Stock
KIMBERLY CLARK CORP	Consumer Staples	\$2,000-\$10,000	Common Stock
LAM RESEARCH CORP	Information Technology	\$2,000-\$10,000	Common Stock
LEIDOS HOLDINGS INC	Information Technology	\$2,000-\$10,000	Common Stock
LINDE PLC	Materials	\$2,000-\$10,000	Common Stock
LOWE'S COS INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
MERCK & CO INC NEW	Health Care	\$2,000-\$10,000	Common Stock
MICROSOFT CORP	Information Technology	\$10,000-\$100,000	Common Stock
MODERNA INC	Health Care	\$2,000-\$10,000	Common Stock
MOODY'S CORP	Consumer Discretionary	\$2,000-\$10,000	Common Stock
NEXTERA ENERGY INC	Utilities	\$2,000-\$10,000	Common Stock
NORTHROP GRUMMAN CORP	Industrials	\$2,000-\$10,000	Common Stock
NVIDIA CORP	Information Technology	\$2,000-\$10,000	Common Stock
PAYPAL HOLDINGS INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
PEPSICO INC	Consumer Staples	\$2,000-\$10,000	Common Stock
STARBUCKS CORP	Consumer Discretionary	\$2,000-\$10,000	Common Stock
TESLA INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
THERMO FISHER SCIENTIFIC INC	Health Care	\$2,000-\$10,000	Common Stock
TRANE TECHNOLOGIES PLC	Industrials	\$2,000-\$10,000	Common Stock
TRUIST FINANCIAL CORP	Financials	\$2,000-\$10,000	Common Stock
TWITTER INC	Information Technology	\$2,000-\$10,000	Common Stock
UNITEDHEALTH GROUP INC	Health Care	\$2,000-\$10,000	Common Stock
VALERO ENERGY CORP-NEW	Energy	\$2,000-\$10,000	Common Stock
WALT DISNEY CO	Consumer Discretionary	\$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
ABBOTT LABORATORIES	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	\$2,000-\$10,000	Common Stock
ANTHEM INC	Health Care	\$2,000-\$10,000	Common Stock
AON PLC	Financials	\$2,000-\$10,000	Common Stock
APPLE INC	Information Technology	\$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
BERKSHIRE HATHAWAY INC CL B	Financials	\$2,000-\$10,000	Common Stock
BORGWARNER INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
BOSTON SCIENTIFIC CORP	Health Care	\$2,000-\$10,000	Common Stock
CATERPILLAR INC	Industrials	\$2,000-\$10,000	Common Stock
CHARTER COMMUNICATIONS INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
COMCAST CORP CL A	Consumer Discretionary	\$2,000-\$10,000	Common Stock
DANAHER CORP	Health Care	\$2,000-\$10,000	Common Stock
ELI LILLY & CO	Health Care	\$2,000-\$10,000	Common Stock
EQUIFAX INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
FACEBOOK INC - A	Information Technology	\$2,000-\$10,000	Common Stock
FORD MOTOR COMPANY	Consumer Discretionary	\$2,000-\$10,000	Common Stock
HOME DEPOT INC	Consumer Discretionary	\$2,000-\$10,000	Common Stock
HP INC	Information Technology	\$2,000-\$10,000	Common Stock
INTEL CORP	Information Technology	\$2,000-\$10,000	Common Stock
INTUIT INC	Information Technology	\$2,000-\$10,000	Common Stock
JOHNSON & JOHNSON	Health Care	\$2,000-\$10,000	Common Stock

**Schedule A-1
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**Name
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Total Gains/Losses for 2021 From 1/1/2021 -12/31/2021 JUELSGAARD S. TTEE JUELSGAARD TR-IMA			
Name of Business Entity	General Description of Business Activity	Gain/Loss	Nature of Investment
3M CO	Industrials	\$0-\$10,000	Common Stock
ACTIVISION BLIZZARD INC	Telecommunications Services	\$0-\$10,000	Common Stock
ALEXANDRIA REAL ESTATE EQUITIES INC	Real Estate	\$0-\$10,000	Common Stock
APARTMENT INCOME REIT CORP	Real Estate	\$0-\$10,000	Common Stock
ASTRAZENECA PLC SPONSORED ADR	Healthcare	\$0-\$10,000	Common Stock
AUTOMATIC DATA PROCESSING INC	Information Technology	\$0-\$10,000	Common Stock
BAKER HUGHES COMPANY	Energy	-\$10,000-\$0	Common Stock
BORG WARNER INC	Consumer Discretionary	\$0-\$10,000	Common Stock
C D W CORP/DE	Information Technology	\$0-\$10,000	Common Stock
C S X CORP	Industrials	\$0-\$10,000	Common Stock
CHARTER COMMUNICATIONS INC-A	Telecommunications Services	\$0-\$10,000	Common Stock
CHUBB LTD	Financials	\$0-\$10,000	Common Stock
COCA - COLA CO	Consumer Staples	-\$10,000-\$0	Common Stock
DARDEN RESTAURANTS INC	Consumer Discretionary	\$0-\$10,000	Common Stock
DUKE ENERGY CORP	Utilities	\$0-\$10,000	Common Stock
DXC TECHNOLOGY CO	Information Technology	\$0-\$10,000	Common Stock
EVEREST RE GROUP LTD	Real Estate	\$0-\$10,000	Common Stock
FIDELITY NATL INFORMATION SVCS INC	Information Technology	-\$10,000-\$0	Common Stock
FISERV INC	Information Technology	-\$10,000-\$0	Common Stock
FORTUNE BRANDS HOME & SECURITY INC	Industrials	\$0-\$10,000	Common Stock
GENERAL MILLS INC	Consumer Staples	\$0-\$10,000	Common Stock
HALLIBURTON CO	Energy	-\$10,000-\$0	Common Stock
HILTON WORLDWIDE HOLDINGS IN	Consumer Discretionary	\$0-\$10,000	Common Stock
HOWMET AEROSPACE INC	Industrials	\$0-\$10,000	Common Stock
INGERSOLL RAND INC	Industrials	\$0-\$10,000	Common Stock
LAMB WESTON HOLDINGS INC	Consumer Staples	\$0-\$10,000	Common Stock
LAS VEGAS SANDS CORP	Consumer Discretionary	-\$10,000-\$0	Common Stock
LINDE PLC	Materials	\$0-\$10,000	Common Stock
LYONDELLBASELL INDU -CL A	Materials	\$0-\$10,000	Common Stock

**Schedule A-1
Investments Sold**

**Name
Stephen Juelsgaard**

Name of Business Entity	General Description of Business Activity	Gain/Loss	Nature of Investment
MARRIOTT INTL INC NEW CL A	Consumer Discretionary	-\$10,000-\$0	Common Stock
MASTERCARD INCORPORATED	Information Technology	\$0-\$10,000	Common Stock
MCCORMICK & CO INC COM NON VTG	Consumer Staples	\$0-\$10,000	Common Stock
MGM RESORTS INTERNATIONAL	Consumer Discretionary	\$0-\$10,000	Common Stock
MID-AMERICA APARTMENT COMMUNITY'S INC	Real Estate	\$0-\$10,000	Common Stock
MOHAWK INDS INC	Consumer Discretionary	\$0-\$10,000	Common Stock
NETFLIX COM INC	Consumer Discretionary	\$0-\$10,000	Common Stock
O'REILLY AUTOMOTIVE INC	Consumer Discretionary	\$0-\$10,000	Common Stock
PHILIP MORRIS INTERNAT	Consumer Discretionary	\$0-\$10,000	Common Stock
PRUDENTIAL FINANCIAL INC	Financials	\$0-\$10,000	Common Stock
REPUBLIC SVCS INC COM	Industrials	\$0-\$10,000	Common Stock
ROYAL CARIBBEAN CRUISES LTD	Consumer Discretionary	\$0-\$10,000	Common Stock
SCHWAB CHARLES CORP NEW	Financials	\$0-\$10,000	Common Stock
SEALED AIR CORP NEW	Materials	\$0-\$10,000	Common Stock
SNAP ON INC	Industrials	\$0-\$10,000	Common Stock
STANLEY BLACK & DECKER INC	Industrials	\$0-\$10,000	Common Stock
THE TRAVELERS COMPANIES INC	Financials	\$0-\$10,000	Common Stock
TRANSDIGM GROUP INC	Industrials	\$0-\$10,000	Common Stock
ULTA BEAUTY, INC	Consumer Discretionary	\$0-\$10,000	Common Stock
UNITED RENTALS INC	Industrials	\$0-\$10,000	Common Stock
VERISIGN INC	Information Technology	\$0-\$10,000	Common Stock
VONTIER CORPORATION	Information Technology	\$0-\$10,000	Common Stock
WABTEC CORP	Industrials	\$0-\$10,000	Common Stock
WELLS FARGO & COMPANY	Financials	\$0-\$10,000	Common Stock
WESTROCK CO	Materials	\$0-\$10,000	Common Stock

**Schedule A-1
Investments Sold**

**Name
Stephen Juelsgaard**

From 1/1/2021 -12/31/2021
JUELSGAARD TTEE JUELSGAARD:IMA-SUB

Name of Business Entity	General Description of Business Activity	Gain/Loss	Nature of Investment
ADOBE INC	Information Technology	\$0-\$10,000	Common Stock
ADVANCED MICRO DEVICES INC	Information Technology	\$0-\$10,000	Common Stock
APPLE INC	Information Technology	\$0-\$10,000	Common Stock
COCA - COLA CO	Consumer Staples	\$0-\$10,000	Common Stock
DEERE & CO	Industrials	\$0-\$10,000	Common Stock
COMCAST CORP CL A	Telecommunications Services	\$0-\$10,000	Common Stock
LAM RESH CORP	Information Technology	\$0-\$10,000	Common Stock
NVIDIA CORP	Information Technology	\$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

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

IF APPLICABLE, LIST DATE:
 ACQUIRED / /21 DISPOSED / /21

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

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

IF APPLICABLE, LIST DATE:
 ACQUIRED / /21 DISPOSED / /21

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: _____

Print **Clear**

SCHEDULE B
Interests in Real Property
(Including Rental Income)

Name Stephen Juelsgaard

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

CITY
Napa

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

IF APPLICABLE, LIST DATE:
 _____ / ____ / 21 _____ / ____ / 21
 ACQUIRED DISPOSED

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. Hwy 88

CITY
Lodi

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

IF APPLICABLE, LIST DATE:
 _____ / ____ / 21 _____ / ____ / 21
 ACQUIRED DISPOSED

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: _____

Print

Clear

SCHEDULE C
Income, Loans, & Business
Positions
(Other than Gifts and Travel Payments)

1. INCOME RECEIVED		1. INCOME RECEIVED	
NAME OF SOURCE OF INCOME SFC Riverview Ranch LP		NAME OF SOURCE OF INCOME SFCPark Knolls Investors LP	
ADDRESS (Business Address Acceptable) 577 Airport Blvd., Ste. 700, Burlingame, CA 94010		ADDRESS (Business Address Acceptable) 577 Airport Blvd., Ste. 700, Burlingame, CA 94010	
BUSINESS ACTIVITY, IF ANY, OF SOURCE Apartment Ownership		BUSINESS ACTIVITY, IF ANY, OF SOURCE Apartment Ownership	
YOUR BUSINESS POSITION Limited Partner		YOUR BUSINESS POSITION Limited Partner	
GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input checked="" type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000		GROSS INCOME RECEIVED <input type="checkbox"/> No Income - Business Position Only <input type="checkbox"/> \$500 - \$1,000 <input checked="" type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	
CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input checked="" type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)		CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input checked="" type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> 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*	INTEREST RATE	TERM (Months/Years)
_____	_____% <input type="checkbox"/> None	_____
ADDRESS (Business Address Acceptable) _____	SECURITY FOR LOAN	
BUSINESS ACTIVITY, IF ANY, OF LENDER _____	<input type="checkbox"/> None <input type="checkbox"/> Personal residence	
HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	<input type="checkbox"/> Real Property _____ Street address _____ City	
	<input type="checkbox"/> Guarantor _____	
	<input type="checkbox"/> Other _____ (Describe)	

Comments: _____

SCHEDULE C

Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

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
 \$500 - \$1,000
 \$10,001 - \$100,000
 No Income - Business Position Only
 \$1,001 - \$10,000
 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
 \$500 - \$1,000
 \$10,001 - \$100,000
 No Income - Business Position Only
 \$1,001 - \$10,000
 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

Comments: _____

INTEREST RATE _____% None

TERM (Months/Years) _____

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

Print Clear

SCHEDULE C

Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

Name
Stephen Juelsgaard

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME
Blackstone 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)

NAME OF SOURCE OF INCOME
GSO Capital Solutions Fund II 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)

▶ 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: _____

Print **Clear**

SCHEDULE C
Income, Loans, & Business
Positions
 (Other than Gifts and Travel Payments)

▶ 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)

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME
HPS Core Senior Lending Fund

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
Apollo EPF III Private Investors LLC

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:

<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> <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	<p>INTEREST RATE TERM (Months/Years)</p> <p>_____ % <input type="checkbox"/> None _____</p> <p>SECURITY FOR LOAN</p> <input type="checkbox"/> None <input type="checkbox"/> Personal residence <input type="checkbox"/> Real Property _____ <small>Street address</small> _____ <small>City</small> <input type="checkbox"/> Guarantor _____ <input type="checkbox"/> Other _____ <small>(Describe)</small>
---	---

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

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

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:

<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 _____% <input type="checkbox"/> None</p> <p>TERM (Months/Years) _____</p> <p>SECURITY FOR LOAN</p> <p><input type="checkbox"/> None <input type="checkbox"/> Personal residence</p> <p><input type="checkbox"/> Real Property _____ Street address _____ City _____</p> <p><input type="checkbox"/> Guarantor _____</p> <p><input type="checkbox"/> Other _____ (Describe)</p>
---	---

Comments: _____

Print **Clear**

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
TRG Growth Partnership LP

ADDRESS (Business Address Acceptable)
One Sansome Street, 23rd Floor, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE
Private Equity Investments

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
DGP Onshore Feeder Fund IV LP

ADDRESS (Business Address Acceptable)
One Sansome Street, 23rd Floor, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE
Private Equity Investments

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: _____

Print **Clear**

SCHEDULE C

Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

Name
Stephen Juelsgaard

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME
Hadley Harbor Pre-IPO Onshore Feeder Fund LP

ADDRESS (Business Address Acceptable)
One Sansome Street, 23rd Floor, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE
Investing in Pre-IPO Companies

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
NGT II Onshore Feeder Fund LP

ADDRESS (Business Address Acceptable)
One Sansome Street, 23rd Floor, San Francisco, CA 94104

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)

▶ 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: _____

Print **Clear**

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
CMMO Crestline Onshore Feeder Fund

ADDRESS (Business Address Acceptable)
One Sansome Street, 23rd Floor, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE
Credit and 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)

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

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: _____

Print **Clear**