

Report Type: Nominee Report

Year (Annual Report only):

Date of Appointment:

Date of Termination:

Executive Branch Personnel Public Financial Disclosure Report (OGE Form 278e)

Filer's Information

Wright, Christopher Allen

Secretary, Department of Energy

Other Federal Government Positions Held During the Preceding 12 Months:

None

Names of Congressional Committees Considering Nomination:

- Committee on Energy and Natural Resources

Electronic Signature - I certify that the statements I have made in this form are true, complete and correct to the best of my knowledge.

/s/ Wright, Christopher Allen [electronically signed on 01/03/2025 by Wright, Christopher Allen in Integrity.gov]

Agency Ethics Official's Opinion - On the basis of information contained in this report, I conclude that the filer is in compliance with applicable laws and regulations (subject to any comments below).

/s/ Richards, Jocelyn, Certifying Official [electronically signed on 01/14/2025 by Richards, Jocelyn in Integrity.gov]

Other review conducted by

/s/ Richards, Jocelyn, Ethics Official [electronically signed on 01/14/2025 by Richards, Jocelyn in Integrity.gov]

U.S. Office of Government Ethics Certification

/s/ Huitema, David, Certifying Official [electronically signed on 01/14/2025 by Huitema, David in Integrity.gov]

1. Filer's Positions Held Outside United States Government

#	ORGANIZATION NAME	CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
1	Liberty Energy	Denver, Colorado	Corporation	Chairman and CEO	3/2011	Present
2	Liberty Resources	Denver, Colorado	Corporation	Chairman and Director	1/2014	Present
3	EMX Royalty	Vancouver, Outside U.S.	Corporation	Director	6/2024	Present
4	Oklo, Inc.	Santa Clara, California	Corporation	Director	4/2024	Present
5	Urban Solution Group	Denver, Colorado	Corporation	Director	7/2018	Present
6	Federal Reserve Bank of Kansas City	Denver, Colorado	Federal Reserve System	Director	1/2020	6/2024
7	Western Energy Alliance	Denver, Colorado	Non-Profit	Director	7/2020	Present
8	Pacific Research Institute	Pasadena, California	Non-Profit	Director	4/2007	Present
9	Property and Environment Research Center	Bozeman, Montana	Non-Profit	Director	3/2019	Present
10	Domestic Energy Producers Alliance.	Tulsa, Oklahoma	Trade body	Director	7/2022	Present
11	Liberty Midstream Solutions	Denver, Colorado	Corporation	Chairman	9/2015	Present
12	Bettering Human Lives Foundation	Denver, Colorado	Non-Profit	Founder	5/2023	Present
13	Family Revocable Trust	Denver, Colorado	Trust	Trustee	6/2008	Present

#	ORGANIZATION NAME		CITY, STATE	ORGANIZATION TYPE	POSITION HELD	FROM	TO
14	Colorado Business Roundtable		Greenwood Village, Colorado	Non-Profit	Director	3/2021	Present
15	Sol 2 LLC	See Endnote	Cherry Hills Village, Colorado	Corporation	Co-Managing Member	5/2021	Present
16	CL Accretion LLC		Denver, Colorado	Corporation	Managing Member	5/2022	10/2024
17	CL Covault LLC		Denver, Colorado	Corporation	Manging Member	5/2022	Present
18	CL Urban LLC		Denver, Colorado	Corporation	Managing Member	5/2022	Present

2. Filer's Employment Assets & Income and Retirement Accounts

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	Liberty Energy (unvested restricted stock units and unvested performance stock units)	N/A	\$5,000,001 - \$25,000,000		None (or less than \$201)
2	Liberty Energy	N/A		Salary/Bonus	\$2,080,837
3	Liberty Energy, anticipated bonus	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)
4	Liberty Resources 401K	No			
4.1	iShares MSCI EAFE International Index K	Yes	\$15,001 - \$50,000		None (or less than \$201)
4.2	Vanguard Consumer Staples Index	Yes	\$15,001 - \$50,000		None (or less than \$201)
4.3	Vanguard Federal Money Market	Yes	\$100,001 - \$250,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT	
4.4	Vanguard Intermediate Term Bond Index Ad	Yes	\$100,001 - \$250,000		None (or less than \$201)	
4.5	Vanguard Total Stock Market Index Inst	Yes	\$50,001 - \$100,000		None (or less than \$201)	
4.6	Vanguard Utilities Index Admiral	Yes	\$15,001 - \$50,000		None (or less than \$201)	
5	Liberty Energy 401K	No				
5.1	MFS Value R6 Fund	Yes	\$100,001 - \$250,000		None (or less than \$201)	
5.2	Vanguard Sm Cap Val Idx Adm Fd	Yes	\$50,001 - \$100,000		None (or less than \$201)	
5.3	Hartford Intl Opp R6 Fund	Yes	\$250,001 - \$500,000		None (or less than \$201)	
6	Liberty Energy Inc	See Endnote	N/A	Over \$50,000,000	Capital Gains Dividends	Over \$5,000,000
7	Oklo Inc.,	No				
7.1	Oklo Inc.	N/A			Director Fees	\$45,162
7.2	Oklo Inc. (unvested restricted stock units)	N/A	\$250,001 - \$500,000			None (or less than \$201)
8	EMX Royalty	No				
8.1	EMX Royalty	N/A			Director Fees	\$24,234
8.2	EMX Royalty Corporation stock options (value not readily ascertainable) 100,000 vested shares, strike \$1.72, vest 6/2024, expire 6/2029	N/A				None (or less than \$201)
8.3	EMX Royalty unvested stock options	N/A	\$1,001 - \$15,000			None (or less than \$201)
9	Federal Reserve Bank of Kansas City	N/A			Director Fees	\$1,550

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
10	CL Urban LLC	No			
10.1	Urban Solution Group	N/A		Director Fees	\$112,013
10.2	Urban Solution Group - private oil and gas services company	N/A	\$100,001 - \$250,000		None (or less than \$201)
11	CL CoVault LLC	No			
11.1	Covault - private oil and gas production	N/A	\$500,001 - \$1,000,000		None (or less than \$201)
12	CL Accretion LLC (SPAC - no longer held)	No			
12.1	Accretion (SPAC, never merged)	N/A	None (or less than \$1,001)		None (or less than \$201)

3. Filer's Employment Agreements and Arrangements

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
1	Liberty Energy	Denver, Colorado	Outstanding unvested restricted stock units and unvested performance stock units will be accelerated and vest upon confirmation to Secretary of Energy position. The Liberty Energy Inc. Long Term Incentive Plan provides the Compensation Committee the discretion to accelerate the vesting of the RSU/PSUs listed above. Typically these awards must have 1 year minimum vesting period, but there is an exception that would allow the Committee to vest the 2024 RSU and PSU awards in this situation. Filer would be issued shares of Liberty Energy (NYSE:LBRT) upon confirmation, less required withholding taxes. This would be a "net vest" where some RSUs and PSUs would be forfeited to satisfy the withholding tax, per Liberty's historical practices.	4/2018

#	EMPLOYER OR PARTY	CITY, STATE	STATUS AND TERMS	DATE
2	Liberty Energy	Denver, Colorado	Annual year end performance bonus of about \$1,000,000 for 2024 calendar year, payable early 2025. The 2024 bonus will be paid in accordance with the 2024 Annual Incentive Program adopted by resolutions of the Liberty Energy Inc. Compensation Committee on January 22, 2024. 80% of the bonus is subject to specific performance metrics; 20% of the opportunity is subject to the discretion of the Compensation Committee. My target bonus for 2024 is \$1,070,000. Actual payment can range from 0 to 200% of target, subject to performance of the company. The bonus will be paid in March.	1/2024
3	Liberty Energy	Denver, Colorado	I will continue to participate in this defined contribution plan. The plan sponsor will not make further contributions after my separation.	3/2011
4	Liberty Resources	Denver, Colorado	I will continue to participate in this defined contribution plan. The plan sponsor will not make further contributions after my separation.	1/2014
5	Oklo Inc.	Santa Clara, California	I will forfeit my unvested restricted stock units upon separation.	4/2024
6	EMX Royalty	Vancouver, Outside U.S.	I will forfeit my unvested stock options upon separation. I will retain my vested stock options.	6/2024

4. Filer's Sources of Compensation Exceeding \$5,000 in a Year

#	SOURCE NAME	CITY, STATE	BRIEF DESCRIPTION OF DUTIES
1	Liberty Energy	Denver, Colorado	CEO and Chairman
2	Oklo Inc.	Santa Clara, California	Director
3	EMX Royalty	Vancouver, Canada, Outside U.S.	Director

#	SOURCE NAME	CITY, STATE	BRIEF DESCRIPTION OF DUTIES
4	Urban Solution Group	Denver, Colorado	Director

5. Spouse's Employment Assets & Income and Retirement Accounts

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	University of California Defined Contribution Plan	No			
1.1	UC Savings Fund	Yes	\$1,001 - \$15,000		None (or less than \$201)

6. Other Assets and Income

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
1	CAZ GP Ownership Class E	Yes	\$1,000,001 - \$5,000,000		\$100,001 - \$1,000,000
2	CAZ DPI FC	Yes	\$1,000,001 - \$5,000,000		\$100,001 - \$1,000,000
3	CAZ Risk Mitigation	Yes	\$250,001 - \$500,000		\$15,001 - \$50,000
4	REOFF IX (Esperanza) - holds commercial real estate, Mexico	No	\$500,001 - \$1,000,000	Dividends	\$50,001 - \$100,000
5	REOFF XXII - real estate portfolio	No	\$250,001 - \$500,000		None (or less than \$201)
5.1	commercial real estate, Allen, TX	N/A			
5.2	commercial real estate, Allen, TX	N/A			

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
5.3	commercial real estate, El Paso, TX	N/A			
5.4	commercial real estate, Fayetteville, NC	N/A			
5.5	commercial real estate, Montgomery, AL	N/A			
5.6	commercial real estate, Montgomery, AL	N/A			
5.7	commercial real estate, Henrico, VA	N/A			
5.8	commercial real estate, Rogers, AR	N/A			
5.9	commercial real estate, Albany, GA	N/A			
5.10	commercial real estate, Beaumont, TX	N/A			
5.11	commercial real estate, Fort Worth, TX	N/A			
5.12	commercial real estate, Jackson, TN	N/A			
5.13	commercial real estate, Johnson City, TN	N/A			
5.14	commercial real estate, Lakeland, FL	N/A			
5.15	commercial real estate, Phoenix, AZ	N/A			
5.16	commercial real estate, Greenville, SC	N/A			
5.17	commercial real estate, Schaumburg, IL	N/A			
5.18	commercial real estate, Vancouver, WA	N/A			
5.19	commercial real estate, Andover, MA	N/A			
5.20	commercial real estate, Irving, TX	N/A			
6	REOFF XXV - holds commercial real estate, San Francisco, CA	No	\$250,001 - \$500,000		None (or less than \$201)
7	Liberty Resources II - private oil and gas exploration and production	N/A	\$50,001 - \$100,000	Capital Gains	\$1,000,001 - \$5,000,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
8	GMT Exploration - private oil and gas exploration and production	N/A	\$500,001 - \$1,000,000		None (or less than \$201)
9	Bison 3 - private oil and gas exploration and production	N/A	\$250,001 - \$500,000		None (or less than \$201)
10	Bison Single DSU - private oil and gas exploration and production	N/A	\$50,001 - \$100,000		None (or less than \$201)
11	Bonanza Kings Hedge Fund - mining company hedge fund	No	\$250,001 - \$500,000		None (or less than \$201)
11.1	Talga Group Ltd (TLC AU)	N/A			
11.2	Sarytogan Graphite Ltd (SGA AU)	N/A			
11.3	Bonterra Resources Inc. (BTR CN)	N/A			
11.4	EMX Royalty Corp (EMX US)	N/A			
11.5	Terra Balcanica Resources Corp (TERA CN)	N/A			
11.6	Kootenay Silver Inc. (KOOYF US)	N/A			
11.7	Federal Hydor-generating Company Rushydro Pao (HYDR LI)	N/A			
11.8	abrdrn Palladium ETF Trust	Yes			
11.9	Denison Mines Corp (DNN US)	N/A			
11.10	United States Mine and Minerals Inc (USLM US)	N/A			
11.11	itafos Inc (IFOS CN)	N/A			
11.12	Deutsche Rohstoff AG (DR0 GY)	N/A			
11.13	Bonterra Energy Corp	N/A			
11.14	SilverCrest Metals Inc (SILV US)	N/A			
11.15	First Mining Gold Corp (FF CN)	N/A			

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
11.16	First Nordic Metals Corp (FNM CN)	N/A			
11.17	K92 Mining Inc	N/A			
11.18	World Copper Ltd (WCU CN)	N/A			
11.19	Maple Gold Mines Ltd ((MGM CN)	N/A			
11.20	Fury Gold Mines (FURY CN)	N/A			
11.21	Bonterra Resources Inc. (BTR CN)	N/A			
11.22	Spartan Delta Corp (SDE CN)	N/A			
11.23	Aurania Resrouces Ltd (ARU CN)	N/A			
11.24	Talisker Resources Ltd (TSK CN)	N/A			
11.25	Calidus Resources Ltd (CAI AU)	N/A			
11.26	Namibia Critical Metals Inc. (NMI CN)	N/A			
11.27	Osisko Development Corp (ODV CN)	N/A			
11.28	Solgold Plc (SOLG LN)	N/A			
11.29	Talon Metals Corp (TLO CN)	N/A			
11.30	Hytterra Ltd (HYT AU)	N/A			
11.31	Lion Copper and Gold Corp (LEO CN)	N/A			
11.32	Smart Sand Inc (SND US)	N/A			
11.33	GFG Resources Inc (GFG CN)	N/A			
11.34	NextGen Energy Ltd (NXE US)	N/A			
11.35	Mega Uranium Ltd. ((MGA CN)	N/A			
11.36	Adriatic Metals Plc. (ADT AU)	N/A			
11.37	AbraSilver Resources Corp (ABRA CN) - `	N/A			

#	DESCRIPTION		EIF	VALUE	INCOME TYPE	INCOME AMOUNT
11.38	Orla Mining Ltd (ORLA US)		N/A			
11.39	Largo Inc (LGO US)		N/A			
11.40	Perpetua Resources Corp (PPTA US)		N/A			
11.41	New Found Gold Corp (NFG CN)		N/A			
11.42	Earth Labs Inc. (SPOT CN)		N/A			
11.43	Verde Agritech PLC (NPK CN)		N/A			
11.44	South Pacific Metals Corp (SPMC CN)		N/A			
11.45	Palisades Goldcorp Ltd. (PALI CN)		N/A			
11.46	Verde Resources Inc (VRDR US)		N/A			
11.47	Anglo American Platinum Limited (ANGPY)		N/A			
11.48	Silver47 Exploration Corp (AGA CN)		N/A			
11.49	Cascadia Minerals Ltd (CAM CN)		N/A			
11.50	Amplify ETF Trust Amplify Junior Silver Miners (SILJ) 01/17/2025 CALL 10 (SILJ 250117C000)		Yes			
11.51	South Pacific Metals Corp (SPMC CN_WTS)		N/A			
11.52	Ridgeline Minerals Corp (RDG CN_WTS1)		N/A			
12	Wild Basin Energy - natural gas royalties in Haynesville Shale (East Texas and Louisiana)	See Endnote	No	\$500,001 - \$1,000,000		None (or less than \$201)
13	Next Frontier Bozeman VC Fund		No	\$250,001 - \$500,000		None (or less than \$201)
13.1	228 Labs, Inc. (AI software company)		N/A			
13.2	CTXOS, Inc. (cloud computing)		N/A			

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
13.3	Dreadnode, Inc. (computer and network security)	N/A			
13.4	Get Whys Inc. (AI software)	N/A			
13.5	Hoonify Technologies, Inc. (computer services)	N/A			
13.6	Paramify, Inc. (security and compliance software company)	N/A			
13.7	Poly API Corporation (AI middleware company)	N/A			
13.8	RetireGO, Inc. (automated retirement benefits provider)	N/A			
13.9	Reveal Technology, Inc. (technology co/3D modeling)	N/A			
13.10	SquarePeg, Inc. (AI recruiting platform)	N/A			
13.11	VirtualZ Computing Corporation (mainframe software)	N/A			
14	Sugar Free Capital VC Fund	No			
14.1	Illumix (augmented reality software company)	N/A	\$15,001 - \$50,000		None (or less than \$201)
14.2	Parity (AI software company)	N/A	\$15,001 - \$50,000		None (or less than \$201)
14.3	U.S. bank account (cash)	N/A	\$250,001 - \$500,000		None (or less than \$201)
15	Koebel Real Estate - commercial real estate portfolio	No	\$250,001 - \$500,000	Rent or Royalties	\$15,001 - \$50,000
15.1	commercial real estate, Centennial, CO	N/A			
15.2	commercial real estate, Dallas, TX	N/A			

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
16	Two Fifty Investors LLC - holds commercial and residential real estate, Denver, CO	No	\$250,001 - \$500,000		None (or less than \$201)
17	House Properties LLC - holds commercial real estate in Mill Valley, CA	No	\$15,001 - \$50,000		None (or less than \$201)
18	Baytex Energy Corp	N/A	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000
19	Blue Owl Capital Inc. Class A Common Stock (OWL)	Yes	\$1,001 - \$15,000		None (or less than \$201)
20	Chevron Corp. (CVX)	N/A	\$500,001 - \$1,000,000	Dividends	\$50,001 - \$100,000
21	Chord Energy Corporation Common Stock (CHRD)	N/A	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000
22	Comstock Resources, Inc. (CRK)	N/A	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000
23	Crescent Energy Co.	N/A	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000
24	EMX Royalty Corporation Common Shares (Canada) (EMX)	N/A	\$500,001 - \$1,000,000		None (or less than \$201)
25	EQT Corp. (EQT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
26	Expand Energy Corp	N/A	\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000
27	Freeport-McMoRan, Inc. (FCX)	N/A	\$1,001 - \$15,000		None (or less than \$201)
28	Inspirato Incorporated Class A Common Stock (ISPO)	N/A	\$15,001 - \$50,000		None (or less than \$201)
29	Nordic American Tankers Ltd. (NAT)	N/A	\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
30	Ovintiv Inc. (DE) (OVV)	N/A	\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000
31	Valero Energy Corp. (VLO)	N/A	\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000
32	Energy Transfer LP Common Units (ET)	N/A	\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000
33	Enterprise Products Partners L.P. Common Stock (EPD)	N/A	\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000
34	Plains All American Pipeline L.P. Common Units representing Limited Partner Interests (PAA)	N/A	\$250,001 - \$500,000	Dividends	\$50,001 - \$100,000
35	Residential Real Estate, Denver, CO	N/A	\$500,001 - \$1,000,000	Rent or Royalties	\$5,001 - \$15,000
36	House Properties LLC (cash only)	No	\$1,001 - \$15,000		None (or less than \$201)
37	Wayfare Tavern - San Francisco, CA restaurant	N/A	\$100,001 - \$250,000		None (or less than \$201)
38	BioFire - private gun manufacturer investment	N/A	\$50,001 - \$100,000		None (or less than \$201)
39	Great Bear Alaska - private oil and gas exploration and production	N/A	\$15,001 - \$50,000		None (or less than \$201)
40	GS Sep Mgmt Account	No			
40.1	Alphabet Inc. Cmn Class A	N/A	\$50,001 - \$100,000		None (or less than \$201)
40.2	Paycom Software Inc Cmn	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
40.3	First Citizens BancShares Inc. Class A Common Stock (FCNCA)	N/A	\$50,001 - \$100,000	Dividends	\$201 - \$1,000

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
40.4	Deere & Co. (DE)	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
40.5	The Charles Schwab Corp. (SCHW)	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
40.6	IQVIA Holdings, Inc. (IQV)	N/A	\$15,001 - \$50,000		None (or less than \$201)
40.7	US bank (cash account)	N/A	\$15,001 - \$50,000	Interest	\$201 - \$1,000
40.8	Intercontinental Exchange, Inc. (ICE)	N/A	\$15,001 - \$50,000		None (or less than \$201)
40.9	CBRE Group, Inc. (CBRE)	N/A	\$15,001 - \$50,000		None (or less than \$201)
40.10	ConocoPhillips (COP)	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
40.11	Capital One Financial Corp. (COF)	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
40.12	Willis Towers Watson Public Limited Company Ordinary Shares (WTW)	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
40.13	Phillips 66 (PSX)	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
40.14	Lithia Motors, Inc. (LAD)	N/A	\$15,001 - \$50,000		None (or less than \$201)
40.15	Centene Corp. (CNC)	N/A	\$15,001 - \$50,000		None (or less than \$201)
40.16	Salesforce.com, inc. (CRM)	N/A	\$15,001 - \$50,000		None (or less than \$201)
40.17	Airbnb Inc. Class A Common Stock (ABNB)	N/A	\$15,001 - \$50,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
40.18	Warner Bros. Discovery Inc. Series A Common Stock (WBD)	N/A	\$15,001 - \$50,000		None (or less than \$201)
40.19	Fiserv, Inc. (FISV)	N/A	\$15,001 - \$50,000		None (or less than \$201)
40.20	Charter Communications, Inc. (CHTR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
40.21	Brunswick Corp. (BC)	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
40.22	Liberty Broadband Corp. Cmn Class C	N/A	\$1,001 - \$15,000		None (or less than \$201)
40.23	American International Group, Inc. (AIG)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
40.24	Elevance Health Inc. Common Stock (ELV)	N/A	\$1,001 - \$15,000		None (or less than \$201)
41	GS Account 1	No			
41.1	The Bank of Nova Scotia note linked to S&P500 Index Cntngnt cpn w buffer structured note due 12/23/2026	N/A	\$15,001 - \$50,000		None (or less than \$201)
41.2	Morgan Stanley Finance LLC note linked to S&P 500 index cntngnt cpn w buffer structured note due 6/10/2026	N/A	\$15,001 - \$50,000		None (or less than \$201)
41.3	Citigroup Inc. note linked to S&P500 Index cntngnt cpn w buffer structured note due 3/26/2025	N/A	\$15,001 - \$50,000		None (or less than \$201)
41.4	Barclays Bank plc note linked to S&P 500 index cntngnt cpn w buffer structured note due 10/08/2025	N/A	\$15,001 - \$50,000		None (or less than \$201)
41.5	Toronto Dominion Bank note linked to S&P 500 Index cntngnt cpn w buffer structured note due 4/16/2025	N/A	\$15,001 - \$50,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
41.6	BNP Paribas note Linked to S&P 500 index cntngnt cpn w buffer structured note due 07/23/2025	N/A	\$15,001 - \$50,000		None (or less than \$201)
41.7	JP Morgan Chase & Co note linked to S&P 500 index cntngnt cpn w buffer structured note due 05/13/2026	N/A	\$15,001 - \$50,000		None (or less than \$201)
41.8	UBS AG note Linked to S&P 500 Index cntngnt cpn w buffer structured note due 1/14/2026	N/A	\$15,001 - \$50,000		None (or less than \$201)
42	GS Account 2	No			
42.1	Microsoft Corp. (MSFT)	N/A	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
42.2	Apple, Inc. (AAPL)	N/A	\$15,001 - \$50,000		None (or less than \$201)
42.3	Walmart, Inc. (WMT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.4	JPMorgan Chase & Co. (JPM)	N/A	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000
42.5	Oracle Corp. (ORCL)	N/A	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000
42.6	Marvell Technology Group Ltd. (MRVL)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.7	Accenture Plc (ACN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.8	The Coca-Cola Co. (KO)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
42.9	Honeywell International, Inc. (HON)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.10	Eli Lilly & Co. (LLY)	N/A	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500
42.11	Blackstone Inc. Common Stock (BX)	See Endnote	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
42.12	Visa, Inc. (V)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.13	Lowes Companies Inc Cmn	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.14	Cisco Systems, Inc. (CSCO)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
42.15	AT&T Inc., Cmn	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
42.16	Abbott Laboratories (ABT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.17	Republic Services, Inc. (RSG)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.18	United Healthgroup Incorporated	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.19	Kenvue Inc. Cmn	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
42.20	Wells Fargo & Company Cmn	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.21	Amgen Inc. (AMGN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.22	Illinois Tool Works, Inc. (ITW)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.23	Danaher Corp. (DHR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.24	Hilton Worldwide Holdings, Inc. (HLT)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.25	Allstate Corporation Common Stock	N/A	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000
42.26	Merck & Co., Inc. (MRK)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.27	Morgan Stanley Common Stock	N/A	\$1,001 - \$15,000		None (or less than \$201)

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
42.28	AbbVie, Inc. (ABBV)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.29	The Progressive Corporation Cmn	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.30	Ameren Corp. (AEE)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.31	Xcel Energy, Inc. (XEL)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.32	CMS Energy Corp. (CMS)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.33	KLA Corp. (KLAC)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.34	EOG Resources, Inc. (EOG)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.35	Ventas, Inc. (VTR)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.36	AstraZeneca PLC Spons Adr Cmn	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.37	Linde Plc (LIN)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.38	Eaton Corp. Plc (ETN)	N/A	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000
42.39	Texas Instruments Incorporated (TXN)	N/A	\$1,001 - \$15,000	Dividends	\$201 - \$1,000
42.40	Alphabet, Inc. (GOOG)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.41	ConocoPhillips (COP)	N/A	\$1,001 - \$15,000		None (or less than \$201)
42.42	CVS Health Corp. (CVS)	N/A	None (or less than \$1,001)	Capital Gains	\$1,001 - \$2,500

#	DESCRIPTION	EIF	VALUE	INCOME TYPE	INCOME AMOUNT
42.43	McDonald's Corp. (MCD)	N/A	None (or less than \$1,001)	Capital Gains	\$1,001 - \$2,500
42.44	Verizon Communications, Inc. (VZ)	N/A	None (or less than \$1,001)	Capital Gains	\$201 - \$1,000
42.45	Ross Stores, Inc. (ROST)	N/A	None (or less than \$1,001)	Capital Gains	\$201 - \$1,000
42.46	Caterpillar, Inc. (CAT)	N/A	None (or less than \$1,001)	Capital Gains	\$2,501 - \$5,000
42.47	Dell Technologies, Inc. (DELL)	N/A	None (or less than \$1,001)	Capital Gains	\$5,001 - \$15,000
43	US bank account (Aggregated Cash Accounts held in single financial institution)	N/A	\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000
44	ARC Resources (AETUF)	N/A	None (or less than \$1,001)	Capital Gains Dividends	\$100,001 - \$1,000,000
45	B. Riley Financial, Inc. (RILY)	N/A	None (or less than \$1,001)	Dividends	\$15,001 - \$50,000
46	Strive Energy (DRLL)	N/A	None (or less than \$1,001)	Capital Gains Dividends	\$15,001 - \$50,000
47	APA Corporation	N/A	None (or less than \$1,001)	Dividends	\$5,001 - \$15,000
48	CrossHarbor Capital Partners	No			
48.1	commercial and residential real estate in Big Sky, MT	N/A	\$250,001 - \$500,000		None (or less than \$201)
48.2	commercial real estate in Big Sky, MT	N/A	\$100,001 - \$250,000		None (or less than \$201)
49	Westside Waterview LLC - owns commercial real estate in Denver, CO	N/A	\$1,000,001 - \$5,000,000		None (or less than \$201)

7. Transactions

(N/A) - Not required for this type of report

8. Liabilities

#	CREDITOR NAME	TYPE	AMOUNT	YEAR INCURRED	RATE	TERM
1	Wells Fargo Bank	Mortgage on Personal Residence	\$1,000,001 - \$5,000,000	2018	4.625	30 years
2	California Bank of Commerce	Exercised Line of Credit	\$250,001 - \$500,000	2021	8.0	4 years
3	Goldman Sachs	Mortgage on Personal Residence	\$5,000,001 - \$25,000,000	2020	2.85	7/1 ARM, 30 year jumbo
4	Fairway Mortgage Company	Mortgage (investment/rental property)	\$250,001 - \$500,000	2019	5.875	30 years

9. Gifts and Travel Reimbursements

(N/A) - Not required for this type of report

Endnotes

PART	#	ENDNOTE
1.	15	Holds one unreportable asset only.
2.	6	Dividends and Cap gains are over \$5 million. Ordinary income was \$13,113,889 as the result of vesting.
6.	12	Wild Basin owns royalties purchased from private landowners and other royalty owners. NO production royalties have yet been received as natural gas wells have yet to be drilled under the royalty lands. However, the royalty lands are currently under leases to drill held by ExxonMobil Corporation Expand Energy Corporation BPX Energy Inc. TG Natural Resources LLC Comstock Energy LLC (oil and gas) Trinity Resources Inc. Aethon Energy (oil and gas), GEP Haynesville II LLC (oil and gas), Pine Wave Energy Partners (oil and gas), and EXCO Energy (oil and gas).
6.	42.11	Broker reports BX as Blackstone Group Inc; however, BX changed names to Blackstone Inc in 2021.

Summary of Contents

1. Filer's Positions Held Outside United States Government

Part 1 discloses positions that the filer held at any time during the reporting period (excluding positions with the United States Government). Positions are reportable even if the filer did not receive compensation.

This section does not include the following: (1) positions with religious, social, fraternal, or political organizations; (2) positions solely of an honorary nature; (3) positions held as part of the filer's official duties with the United States Government; (4) mere membership in an organization; and (5) passive investment interests as a limited partner or non-managing member of a limited liability company.

2. Filer's Employment Assets & Income and Retirement Accounts

Part 2 discloses the following:

- Sources of earned and other non-investment income of the filer totaling more than \$200 during the reporting period (e.g., salary, fees, partnership share, honoraria, scholarships, and prizes)
- Assets related to the filer's business, employment, or other income-generating activities (1) that ended the reporting period with a value greater than \$1,000 or (2) from which more than \$200 in income was received during the reporting period (e.g., equity in business or partnership, stock options, retirement plans/accounts and their underlying holdings as appropriate, deferred compensation, and intellectual property, such as book deals and patents)

This section does not include assets or income from United States Government employment or assets that were acquired separately from the filer's business, employment, or other income-generating activities (e.g., assets purchased through a brokerage account). Note: The type of income is not required if the amount of income is \$0 - \$200 or if the asset qualifies as an excepted investment fund (EIF).

3. Filer's Employment Agreements and Arrangements

Part 3 discloses agreements or arrangements that the filer had during the reporting period with an employer or former employer (except the United States Government), such as the following:

- Future employment
- Leave of absence
- Continuing payments from an employer, including severance and payments not yet received for previous work (excluding ordinary salary from a current employer)
- Continuing participation in an employee welfare, retirement, or other benefit plan, such as pensions or a deferred compensation plan
- Retention or disposition of employer-awarded equity, sharing in profits or carried interests (e.g., vested and unvested stock options, restricted stock, future share of a company's profits, etc.)

4. Filer's Sources of Compensation Exceeding \$5,000 in a Year

Part 4 discloses sources (except the United States Government) that paid more than \$5,000 in a calendar year for the filer's services during any year of the reporting period.

The filer discloses payments both from employers and from any clients to whom the filer personally provided services. The filer discloses a source even if the source made its payment to the filer's employer and not to the filer. The filer does not disclose a client's payment to the filer's employer if the filer did not provide the services for which the client is paying.

5. Spouse's Employment Assets & Income and Retirement Accounts

Part 5 discloses the following:

- Sources of earned income (excluding honoraria) for the filer's spouse totaling more than \$1,000 during the reporting period (e.g., salary, consulting fees, and partnership share)
- Sources of honoraria for the filer's spouse greater than \$200 during the reporting period
- Assets related to the filer's spouse's employment, business activities, other income-generating activities (1) that ended the reporting period with a value greater than \$1,000 or (2) from which more than \$200 in income was received during the reporting period (e.g., equity in business or partnership, stock options, retirement plans/accounts and their underlying holdings as appropriate, deferred compensation, and intellectual property, such as book deals and patents)

This section does not include assets or income from United States Government employment or assets that were acquired separately from the filer's spouse's business, employment, or other income-generating activities (e.g., assets purchased through a brokerage account). Note: The type of income is not required if the amount of income is \$0 - \$200 or if the asset qualifies as an excepted investment fund (EIF). Amounts of income are not required for a spouse's earned income (excluding honoraria).

6. Other Assets and Income

Part 6 discloses each asset, not already reported, (1) that ended the reporting period with a value greater than \$1,000 or (2) from which more than \$200 in investment income was received during the reporting period. For purposes of the value and income thresholds, the filer aggregates the filer's interests with those of the filer's spouse and dependent children.

This section does not include the following types of assets: (1) a personal residence (unless it was rented out during the reporting period); (2) income or retirement benefits associated with United States Government employment (e.g., Thrift Savings Plan); and (3) cash accounts (e.g., checking, savings, money market accounts) at a single financial institution with a value of \$5,000 or less (unless more than \$200 in income was received). Additional exceptions apply. Note: The type of income is not required if the amount of income is \$0 - \$200 or if the asset qualifies as an excepted investment fund (EIF).

7. Transactions

Part 7 discloses purchases, sales, or exchanges of real property or securities in excess of \$1,000 made on behalf of the filer, the filer's spouse or dependent child during the reporting period.

This section does not include transactions that concern the following: (1) a personal residence, unless rented out; (2) cash accounts (e.g., checking, savings, CDs, money market accounts) and money market mutual funds; (3) Treasury bills, bonds, and notes; and (4) holdings within a federal Thrift Savings Plan account. Additional exceptions apply.

8. Liabilities

Part 8 discloses liabilities over \$10,000 that the filer, the filer's spouse or dependent child owed at any time during the reporting period.

This section does not include the following types of liabilities: (1) mortgages on a personal residence, unless rented out (note: certain PAS nominees and appointees are required to report all mortgages); (2) loans secured by a personal motor vehicle, household furniture, or appliances, unless the loan exceeds the item's purchase price; and (3) revolving charge accounts, such as credit card balances, if the outstanding liability did not exceed \$10,000 at the end of the reporting period. Additional exceptions apply.

9. Gifts and Travel Reimbursements

This section discloses:

- Gifts totaling more than \$480 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.
- Travel reimbursements totaling more than \$480 that the filer, the filer's spouse, and dependent children received from any one source during the reporting period.

For purposes of this section, the filer need not aggregate any gift or travel reimbursement with a value of \$192 or less. Regardless of the value, this section does not include the following items: (1) anything received from relatives; (2) anything received from the United States Government or from the District of Columbia, state, or local governments; (3) bequests and other forms of inheritance; (4) gifts and travel reimbursements given to the filer's agency in connection with the filer's official travel; (5) gifts of hospitality (food, lodging, entertainment) at the donor's residence or personal premises; and (6) anything received by the filer's spouse or dependent children totally independent of their relationship to the filer. Additional exceptions apply.

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5 U.S.C. § 13101 et seq., and 5 C.F.R. Part 2634 of the U. S. Office of Government Ethics regulations require the reporting of this information. Failure to provide the requested information may result in separation, disciplinary action, or civil action. The primary use of the information on this report is for review by Government officials to determine compliance with applicable Federal laws and regulations. This report may also be disclosed upon request to any requesting person in accordance with 5 U.S.C. §§ 13107 and § 13122(b)(1) or as otherwise authorized by law. You may inspect applications for public access of your own form upon request. Additional disclosures of the information on this report may be made: (1) to any requesting person, subject to the limitation contained in section 208(d)(1) of title 18, any determination granting an exemption pursuant to sections 208(b)(1) and 208(b)(3) of title 18; (2) to a Federal, State, or local law enforcement agency if the disclosing agency becomes aware of violations or potential violations of law or regulation; (3) to a source when necessary to obtain information relevant to a conflict of interest investigation or determination; (4) to the National Archives and Records Administration or the General Services Administration in records management inspections; (5) to the Office of Management and Budget during legislative coordination on private relief legislation; (6) when the disclosing agency determines that the records are arguably relevant to a proceeding before a court, grand jury, or administrative or adjudicative body, or in a proceeding before an administrative or adjudicative body when the adjudicator determines the records to be relevant to the proceeding; (7) to reviewing officials in a new office, department or agency when an employee transfers or is detailed from one covered position to another, a public financial disclosure report and any accompanying documents, including statements notifying an employee's supervising ethics office of the commencement of negotiations for future employment or compensation or of an agreement for future employment or compensation; (8) to a Member of Congress or a congressional office in response to an inquiry made on behalf of and at the request of an individual who is the subject of the record; (9) to contractors and other non-Government employees working on a contract, service or assignment for the Federal Government when necessary to accomplish a function related to this system of records; (10) on the OGE Website and to any person, department or agency, any written ethics agreement, including certifications of ethics agreement compliance, filed with OGE by an individual nominated by the President to a position requiring Senate confirmation; (11) on the OGE Website and to any person, department or agency, any certificate of divestiture issued by OGE; (12) on the OGE Website and to any person, department or agency, any waiver of the restrictions contained in Executive Order 13989 or any superseding executive order; (13) to appropriate agencies, entities and persons when there has been a suspected or confirmed breach of the system of records, the agency maintaining the records has determined that there is a risk of harm to individuals, the agency, the Federal Government, or national security, and the disclosure is reasonably necessary to assist in connection with the agency's efforts to respond to the suspected or confirmed breach or to prevent, minimize, or remedy such harm; and (14) to another Federal agency or Federal entity, when the agency maintaining the record determines that information from this system of records is reasonably necessary to assist the recipient agency or entity in responding to a suspected or confirmed breach or in preventing, minimizing, or remedying the risk of harm to individuals, the recipient agency or entity, the Federal Government, or national security. See also the OGE/GOVT-1 executive branch-wide Privacy Act system of records.

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