



6/4/2024

The Honorable City Council
c/o Holly Wolcott, City Clerk
200 North Spring Street
City Hall – 3rd Floor
Los Angeles CA 90012

**Re: Council File Number 23-1200-S12
Reappointment of Monique Lawshe to the
City Planning Commission**

FOR COUNCIL CONSIDERATION

Dear Councilmembers:

Monique Lawshe was reappointed by the Mayor's Office to the City Planning Commission on May 20, 2024. The Ethics Commission received notice of the reappointment from the Mayor's Office on May 21, 2024. The Ethics Commission notified Ms. Lawshe on May 21, 2024 of their filing requirement and received Ms. Lawshe's completed pre-confirmation financial disclosure statement on June 4, 2024. In compliance with Los Angeles Municipal Code § 49.5.10, a copy of Ms. Lawshe's financial disclosure statement is enclosed.

If you have questions, please feel free to contact me at (213) 978-1960.

Sincerely,

A handwritten signature in black ink that reads "Carlos Patzi".

Carlos Patzi
Ethics Program Analyst

Enclosures:

Form 700

Form 60

cc: Mayor Karen Bass

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

RECEIVED
Date Initial Filing Received
Filing Official Use Only

JUN 04 2024

LOS ANGELES CITY
ETHICS COMMISSION

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
LAWSHE JAN MICHE

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

PLANNING DEPARTMENT

Division, Board, Department, District, if applicable

Your Position

► 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 LOS ANGELES

☐ Other

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

☐ Annual: The period covered is January 1, 2023, through
December 31, 2023.

☐ Leaving Office: Date Left ____/____/____
(Check one circle.)

-or-

The period covered is ____/____/____, through
December 31, 2023.

☐ The period covered is January 1, 2023, through the date
of leaving office.

-or-

☐ Assuming Office: Date assumed ____/____/____

☐ The period covered is ____/____/____, through
the date of leaving office.

☒ Candidate: Date of Election 5/20/24 and office sought, if different than Part 1:

4. Schedule Summary (required)

► Total number of pages including this cover page:

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)

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS

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

6/4/2024

(month, day, year)

Signature

[Signature]

(File the original signed paper statement with your filing official.)

SEE

ATTACHED

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 COMMISSIONName JAN MONIQUE
LALOSHE

▶ 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:

 / / 23 / / 23
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

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 / / 23 / / 23
 ACQUIRED DISPOSED

Comments: _____

NAME OF BUSINESS ENTITY	GENERAL DESCRIPTION OF THIS BUSINESS ACTIVITY	FAIR MARKET VALUE (Select from drop down list)	NATURE OF INVESTMENT (Select from drop down list. If "other," describe)	IF APPLICABLE, LIST DATE (mm/dd/yyyy)	
				ACQUIRED	DISPOSED
APPLE INC	Consumer Electronics	\$10,001 - \$100,000	Stock		
MICROSOFT CORP	Software—Infrastructure	\$10,001 - \$100,000	Stock		
AMAZON.COM INC	Internet Retail	\$10,001 - \$100,000	Stock		
EXXON MOBIL CORP	Oil & Gas Integrated	\$10,001 - \$100,000	Stock		
JPMORGAN CHASE & CO	Banks—Diversified	\$10,001 - \$100,000	Stock		
ALPHABET INC	Internet Content & Information	\$10,001 - \$100,000	Stock		
VISA INC	Credit Services	\$10,001 - \$100,000	Stock		
VIDIA CORPORATION COM	Semiconductors	\$10,001 - \$100,000	Stock		
BERKSHIRE HATHAWAY INC COM USD0.0033 CLASS B	Insurance—Diversified	\$10,001 - \$100,000	Stock		
ALPHABET INC CAP STK CL C	Internet Content & Information	\$10,001 - \$100,000	Stock		
META PLATFORMS INC CLASS A COMMON STOCK	Internet Content & Information	\$10,001 - \$100,000	Stock		
MASTERCARD INCORPORATED CL A	Credit Services	\$10,001 - \$100,000	Stock		
HOME DEPOT INC	Home Improvement Retail	\$10,001 - \$100,000	Stock		
ABBVIE INC COM USD0.01	Drug Manufacturers—General	\$10,001 - \$100,000	Stock		
TESLA INC COM	Auto Manufacturers	\$10,001 - \$100,000	Stock		
BROADCOM INC COM	Semiconductors	\$10,001 - \$100,000	Stock		
MERCK &CO. INC COM	Drug Manufacturers—General	\$10,001 - \$100,000	Stock		
CHEVRON CORP NEW COM	Oil & Gas Integrated	\$2,000 - \$10,000	Stock		
COCA-COLA CO	Beverages—Non-Alcoholic	\$2,000 - \$10,000	Stock		
PROCTER AND GAMBLE CO COM	Household & Personal Products	\$2,000 - \$10,000	Stock		
UNITEDHEALTH GROUP INC	Healthcare Plans	\$10,001 - \$100,000	Stock		
WALMART INC COM	Discount Stores	\$2,000 - \$10,000	Stock		
PEPSICO INC	Beverages—Non-Alcoholic	\$2,000 - \$10,000	Stock		
BANK AMERICA CORP COM	Banks—Diversified	\$2,000 - \$10,000	Stock		
JOHNSON & JOHNSON COM USD1.00	Drug Manufacturers—General	\$2,000 - \$10,000	Stock		
THERMO FISHER SCIENTIFIC INC	Diagnostics & Research	\$2,000 - \$10,000	Stock		
PFIZER INC	Drug Manufacturers—General	\$2,000 - \$10,000	Stock		
ADOBE SYSTEMS INCORPORATED COM	Software—Infrastructure	\$10,001 - \$100,000	Stock		
DISNEY WALT CO COM	Entertainment	\$2,000 - \$10,000	Stock		
HONEYWELL INTERNATIONAL INC COM USD1	Conglomerates	\$2,000 - \$10,000	Stock		
STARBUCKS CORP COM USD0.001	Restaurants	\$2,000 - \$10,000	Stock		
NETELIX INC	Entertainment	\$10,001 - \$100,000	Stock		
ACCENTURE PLC	Information Technology Services	\$2,000 - \$10,000	Stock		
UNION PAC CORP COM	Railroads	\$2,000 - \$10,000	Stock		
DANAHER CORPORATION COM	Diagnostics & Research	\$2,000 - \$10,000	Stock		
PROLOGIS INC.COM	REIT—Industrial	\$2,000 - \$10,000	Stock		
NEXTERA ENERGY INC COM USD0.01	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		
LOCKHEED MARTIN CORP COM USD1.00	Aerospace & Defense	\$2,000 - \$10,000	Stock		
BRISTOL-MYERS SQUIBB CO COM	Drug Manufacturers—General	\$2,000 - \$10,000	Stock		
BOOKING HOLDINGS INC COM	Travel Services	\$2,000 - \$10,000	Stock		
LOWES COMPANIES INC COM USD0.50	Home Improvement Retail	\$2,000 - \$10,000	Stock		
CISCO SYSTEMS INC	Communication Equipment	\$2,000 - \$10,000	Stock		
APPLIED MATERIALS INC COM USD0.01	Semiconductor Equipment & Materials	\$2,000 - \$10,000	Stock		
TEXAS INSTRUMENTS INC COM USD1.00	Semiconductors	\$2,000 - \$10,000	Stock		
GENERAL ELECTRIC CO COM NEW	Specialty Industrial Machinery	\$2,000 - \$10,000	Stock		
CATERPILLAR INC COM	Farm & Heavy Construction Machinery	\$2,000 - \$10,000	Stock		
BLACKROCK INC COM USD0.01	Asset Management	\$2,000 - \$10,000	Stock		
GILEAD SCIENCES INC COM USD0.001	Drug Manufacturers—General	\$2,000 - \$10,000	Stock		

9/1/2023

NAME OF BUSINESS ENTITY	GENERAL DESCRIPTION OF THIS BUSINESS ACTIVITY	FAIR MARKET VALUE (Select from drop down list)	NATURE OF INVESTMENT (Select from drop down list If "other," describe)	IF APPLICABLE, LIST DATE (mm/dd/yyyy)	
ANALOG DEVICES INC COM USD0.16 2/3	Semiconductors	\$2,000 - \$10,000	Stock	1/30/2023	
MONDELEZ INTL INC COM NPV	Confectioners	\$2,000 - \$10,000	Stock		
T-MOBILE US INC COM	Telecom Services	\$2,000 - \$10,000	Stock		
AMERICAN EXPRESS CO COM USD0.20	Credit Services	\$2,000 - \$10,000	Stock		
PAYPAL HLDS INC COM	Credit Services	\$2,000 - \$10,000	Stock		
INTEL CORP COM USD0.001	Semiconductors	\$2,000 - \$10,000	Stock		
MARSH & MCLENNAN COMPANIES INC COM USD1.00	Insurance Brokers	\$2,000 - \$10,000	Stock		
ALIGN TECHNOLOGY INC COM USD0.0001	Medical Devices	\$2,000 - \$10,000	Stock		
FISERV INC	Information Technology Services	\$2,000 - \$10,000	Stock		
ELEVANCE HEALTH INC COM	Healthcare Plans	\$2,000 - \$10,000	Stock		
ELI LILLY AND CO	Drug Manufacturers—General	\$10,001 - \$100,000	Stock	8/7/2023	
EATON CORPORATION PLC	Drug Manufacturers—Specialty & Generic	\$2,000 - \$10,000	Stock		
ZOCUS INC	Drug Manufacturers—Specialty & Generic	\$2,000 - \$10,000	Stock		
SERVENCOW INC COM USD0.001	Software—Application	\$2,000 - \$10,000	Stock		
AUTOMATIC DATA PROCESSING INC COM USD0.10	Staffing & Employment Services	\$2,000 - \$10,000	Stock		
INTUITIVE SURGICAL INC	Medical Instruments & Supplies	\$2,000 - \$10,000	Stock		
SALESFORCE INC COM	Software—Application	\$2,000 - \$10,000	Stock		
ILLINOIS TOOL WORKS INC COM USD0.01	Specialty Industrial Machinery	\$2,000 - \$10,000	Stock		
DEERE & CO	Farm & Heavy Construction Machinery	\$2,000 - \$10,000	Stock		
STRYKER CORPORATION COM	Medical Devices	\$2,000 - \$10,000	Stock		
ADVANCED MICRO DEVICES INC	Semiconductors	\$2,000 - \$10,000	Stock	8/7/2023	
ESTEE LAUDER COMPANIES INC COM USD0.01 CLASS A	Household & Personal Products	\$2,000 - \$10,000	Stock		
AMPHENOL CORP CLASS A COM USD0.001	Electronic Components	\$2,000 - \$10,000	Stock		
WELLTOWER INC COM	REIT—Healthcare Facilities	\$2,000 - \$10,000	Stock		
TXI COMPANIES INC	Apparel Retail	\$2,000 - \$10,000	Stock		
MORGAN STANLEY COM USD0.01	Capital Markets	\$2,000 - \$10,000	Stock		
COSTCO WHOLESALE CORP COM USD0.01	Discount Stores	\$2,000 - \$10,000	Stock		
MICROCHIP TECHNOLOGY INC COM	Semiconductors	\$2,000 - \$10,000	Stock		
IDEXX LABORATORIES INC COM USD0.10	Diagnostics & Research	\$2,000 - \$10,000	Stock		
SEMPRA COM	Utilities—Diversified	\$2,000 - \$10,000	Stock		
EXELON CORP COM NPV	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock	5/5/2023	
NORFOLK SOUTHERN CORP COM	Railroads	\$2,000 - \$10,000	Stock		
KIMBERLY-CLARK CORP COM	Household & Personal Products	\$2,000 - \$10,000	Stock		
STATE STREET CORP	Asset Management	\$2,000 - \$10,000	Stock		
MSCI INC	Financial Data & Stock Exchanges	\$2,000 - \$10,000	Stock		
UNIDE PLC COM EUR0.001	Specialty Chemicals	\$2,000 - \$10,000	Stock		
COMCAST CORP	Telecom Services	\$2,000 - \$10,000	Stock		
CADENCE DESIGN SYSTEMS INC COM USD0.01	Software—Application	\$2,000 - \$10,000	Stock		
SCHWAB CHARLES CORP COM	Capital Markets	\$2,000 - \$10,000	Stock		
WELLS FARGO CO NEW COM	Banks—Diversified	\$2,000 - \$10,000	Stock		
METLIFE INC COM USD0.01	Insurance—Life	\$2,000 - \$10,000	Stock	4/3/2023 4/3/2023 5/5/2023	
AMERIPRISE FINANCIAL INC COM USD0.01	Asset Management	\$2,000 - \$10,000	Stock		
SCHLUMBERGER LIMITED COM USD0.01	Oil & Gas Equipment & Services	\$2,000 - \$10,000	Stock		
CHIPPOTLE MEXICAN GRILL INC	Restaurants	\$2,000 - \$10,000	Stock		
KLA CORP COM NEW	Semiconductor Equipment & Materials	\$2,000 - \$10,000	Stock		
AT&T INC COM USD1	Telecom Services	\$2,000 - \$10,000	Stock		
ON SEMICONDUCTOR CORP COM USD0.01	Semiconductors	\$2,000 - \$10,000	Stock		
WASTE MANAGEMENT INC	Waste Management	\$2,000 - \$10,000	Stock		
DIGITAL REALTY TRUST INC	REIT—Specialty	\$2,000 - \$10,000	Stock		
ALTRIA GROUP INC	Tobacco	\$2,000 - \$10,000	Stock		

NAME OF BUSINESS ENTITY	GENERAL DESCRIPTION OF THIS BUSINESS ACTIVITY	FAIR MARKET VALUE (Select from drop down list)	NATURE OF INVESTMENT (Select from drop down list. If "other," describe)	IF APPLICABLE, LIST DATE (mm/dd/yyyy)	
				ACQUIRED	DISPOSED
AIR PRODUCTS AND CHEMICALS INC	Specialty Chemicals	\$2,000 - \$10,000	Stock		
INTERCONTINENTAL EXCHANGE INC COM USD0.01	Financial Data & Stock Exchanges	\$2,000 - \$10,000	Stock		
EBAY INC. COM	Internet Retail	\$2,000 - \$10,000	Stock		
SOUTHERN CO	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		
NEWMONT CORP COM/ISIN #US6516391066 SEDOL #BJYCTV2	Gold Mining	\$2,000 - \$10,000	Stock		
ABBOTT LABORATORIES	Medical Devices	\$2,000 - \$10,000	Stock		
BALL CORP COM NPV	Packaging & Containers	\$2,000 - \$10,000	Stock		10/9/2023
MCDONALD S CORP	Restaurants	\$2,000 - \$10,000	Stock		
JOHNSON CONTROLS INTERNATIONAL PLC COM USD1.00	Building Products & Equipment	\$2,000 - \$10,000	Stock		8/7/2023
EVERSOURCE ENERGY	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		4/3/2023
TRUIST FINL CORP COM	Banks—Regional	\$2,000 - \$10,000	Stock		
NRG ENERGY INC	Utilities—Independent Power Producers	\$2,000 - \$10,000	Stock		
ORACLE CORP	Software—Infrastructure	\$2,000 - \$10,000	Stock		8/7/2023
DOLLAR TREE INC	Discount Stores	\$2,000 - \$10,000	Stock		
HP INC COM	Computer Hardware	\$2,000 - \$10,000	Stock		
THE CIGNA GROUP COM	Healthcare Plans	\$2,000 - \$10,000	Stock		
SYNOPSYS INC	Software—Infrastructure	\$2,000 - \$10,000	Stock		
CENTENE CORP	Healthcare Plans	\$2,000 - \$10,000	Stock		
FORD MTR CO DEL COM	Auto Manufacturers	\$2,000 - \$10,000	Stock		
DUPONT DE NEMOURS INC COM	Specialty Chemicals	\$2,000 - \$10,000	Stock		
WARNER BROS DISCOVERY INC COM SER A	Entertainment	\$2,000 - \$10,000	Stock		
PROGRESSIVE CORP COM	Insurance—Property & Casualty	\$2,000 - \$10,000	Stock		10/9/2023
RAYTHEON TECHNOLOGIES CORP COM	Aerospace & Defense	\$2,000 - \$10,000	Stock		9/7/2023
CH ROBINSON WORLDWIDE INC COM USD0.10	Integrated Freight & Logistics	\$2,000 - \$10,000	Stock		
AON PLC SHS CL A COM USD0.01	Insurance Brokers	\$2,000 - \$10,000	Stock		11/9/2023
AGILENT TECHNOLOGIES INC COM USD0.01	Diagnostics & Research	\$2,000 - \$10,000	Stock		
ACTIVISION BLIZZARD INC COM	Electronic Gaming & Multimedia	\$2,000 - \$10,000	Stock		
AMERICAN TOWER CORP NEW COM	REIT—Specialty	\$2,000 - \$10,000	Stock	3/3/2023	8/7/2023
CONOCOPHILIPS COM	Oil & Gas E&P	\$2,000 - \$10,000	Stock		
TYLER TECHNOLOGIES INC	Software—Application	\$2,000 - \$10,000	Stock		
HILTON WORLDWIDE HLDGS INC	Lodging	\$2,000 - \$10,000	Stock		
UNITED PARCEL SERVICE INC CL B	Integrated Freight & Logistics	\$2,000 - \$10,000	Stock		9/7/2023
CDW CORP COM USD0.01	Information Technology Services	\$2,000 - \$10,000	Stock		
PACCAR INC COM USD1.00	Farm & Heavy Construction Machinery	\$2,000 - \$10,000	Stock		
ANSYS INC COM USD0.01	Software—Application	\$2,000 - \$10,000	Stock		
CB&E GLOBAL MARKETS INC	Financial Data & Stock Exchanges	\$2,000 - \$10,000	Stock	3/3/2023	10/9/2023
MEDTRONIC PLC	Medical Devices	\$2,000 - \$10,000	Stock		
ARCHER-DANIELS-MIDLAND CO	Farm Products	\$2,000 - \$10,000	Stock		5/5/2023
GENERAL MTRS CO COM	Auto Manufacturers	\$2,000 - \$10,000	Stock		
AMGEN INC	Drug Manufacturers—General	\$2,000 - \$10,000	Stock		
CUMMINS INC	Specialty Industrial Machinery	\$2,000 - \$10,000	Stock		
EOG RESOURCES INC	Oil & Gas E&P	\$2,000 - \$10,000	Stock		
HUYANA INC	Healthcare Plans	\$2,000 - \$10,000	Stock		
WEST PHARMACEUTICAL SERVICES INC	Medical Instruments & Supplies	\$2,000 - \$10,000	Stock		
TRANE TECHNOLOGIES PLC COM USD1	Building Products & Equipment	\$2,000 - \$10,000	Stock		
VERIZON COMMUNICATIONS INC	Telecom Services	\$2,000 - \$10,000	Stock		8/7/2023
NORTHROP GRUMMAN CORP COM USD1	Aerospace & Defense	\$2,000 - \$10,000	Stock		
CHUBB LIMITED COM NPV/ISIN #CH0044326745	Insurance—Property & Casualty	\$2,000 - \$10,000	Stock		4/3/2023
HUNTINGTON BANCSHARES INC COM USD0.01	Banks—Regional	\$2,000 - \$10,000	Stock		
TYSON FOODS INC	Farm Products	\$2,000 - \$10,000	Stock		8/7/2023

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TE CONNECTIVITY LTD COM CHF0.57	Electronic Components	\$2,000 - \$10,000	Stock		
EQUIFAX INC COM USD1.25	Consulting Services	\$2,000 - \$10,000	Stock		
INTERNATIONAL BUS MACH CORP COM USD0.20	Information Technology Services	\$2,000 - \$10,000	Stock		
TARGET CORP	Discount Stores	\$2,000 - \$10,000	Stock		8/7/2023
MARTIN MARIETTA MATERIALS INC COM USD0.01	Building Materials	\$2,000 - \$10,000	Stock		
FREEMORT MACMORAN INC COM USD0.10	Copper	\$2,000 - \$10,000	Stock		
REGIONS FINANCIAL CORP NEW COM	Banks—Regional	\$2,000 - \$10,000	Stock		5/5/2023
ARTHUR J. GALLAGHER & CO. ISIN #US3535761097 SEDOL #B01QWJ0	Insurance Brokers	\$2,000 - \$10,000	Stock		
COPART INC COM USD0.0001	Auto & Truck Dealerships	\$2,000 - \$10,000	Stock		
BAK OF NEW YORK MELLON CORP COM USD0.01	Asset Management	\$2,000 - \$10,000	Stock		
AFIAC INC COM USD0.10	Insurance—Life	\$2,000 - \$10,000	Stock		
CBRE GROUP INC COM USD0.01 CLASS A	Real Estate Services	\$2,000 - \$10,000	Stock		
OREILLY AUTOMOTIVE INC COM	Specialty Retail	\$2,000 - \$10,000	Stock		
AUTODESK INC	Software—Application	\$2,000 - \$10,000	Stock		
TELEFLEX INCORPORATED COM	Medical Instruments & Supplies	\$2,000 - \$10,000	Stock		
GENERAL DYNAMICS CORP COM USD1.00	Aerospace & Defense	\$2,000 - \$10,000	Stock		
PNC FINANCIAL SERVICES GROUP COM USD5	Banks—Regional	\$2,000 - \$10,000	Stock		
V F CORP COM NPV	Apparel Manufacturing	\$2,000 - \$10,000	Stock		
STANLEY BLACK & DECKER INC	Tools & Accessories	\$2,000 - \$10,000	Stock	3/3/2023	
DISCOVER FINANCIAL SERVICES	Credit Services	\$2,000 - \$10,000	Stock		
MODERNA INC COM	Biotechnology	\$2,000 - \$10,000	Stock		8/7/2023
TRANSDIGM GROUP INC	Aerospace & Defense	\$2,000 - \$10,000	Stock		
INTERNATIONAL FLAVORS & FRAGRANCES COM USD0.125	Specialty Chemicals	\$2,000 - \$10,000	Stock		8/7/2023
ROCKWELL AUTOMATION INC COM USD1	Specialty Industrial Machinery	\$2,000 - \$10,000	Stock		
METTER-TOLEDO INTERNATIONAL INC COM USD0.01	Diagnostics & Research	\$2,000 - \$10,000	Stock		10/9/2023
BOEING CO COM USD3.00	Aerospace & Defense	\$2,000 - \$10,000	Stock		
GE HEALTHCARE TECHNOLOGIES INC COMMON STOCK	Health Information Services	\$2,000 - \$10,000	Stock		
HUNT J.B. TRANSPORT SERVICES INC COM NPV	Integrated Freight & Logistics	\$2,000 - \$10,000	Stock		
MCCORMICK & COMPANY INC COM NPV	Packaged Foods	\$2,000 - \$10,000	Stock	3/3/2023	
PRINCIPAL FINANCIAL GROUP INC COM	Asset Management	\$2,000 - \$10,000	Stock		10/9/2023
VERTEX PHARMACEUTICALS INC	Biotechnology	\$2,000 - \$10,000	Stock		
COTERRA ENERGY INC COM	Oil & Gas E&P	\$2,000 - \$10,000	Stock		
INTERNATIONAL PAPER CO COM	Packaging & Containers	\$2,000 - \$10,000	Stock		1/30/2023
BAXTER INTERNATIONAL INC COM USD1.00	Medical Instruments & Supplies	\$2,000 - \$10,000	Stock		8/7/2023
DUKE ENERGY CORP NEW COM NEW ISIN #US29441C2004 SEDOL #B7J2SK0	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		
MARRIOTT INTERNATIONAL INC COM USD0.01 CLASS A	Lodging	\$2,000 - \$10,000	Stock		
VALERO ENERGY CORP COM	Oil & Gas Refining & Marketing	\$2,000 - \$10,000	Stock		
MCKESSON CORP	Medical Distribution	\$2,000 - \$10,000	Stock		
ENPHASE ENERGY INC COM USD0.00001	Solar	\$2,000 - \$10,000	Stock		5/5/2023
OCCIDENTAL PETE CORP COM	Oil & Gas E&P	\$2,000 - \$10,000	Stock		
LIVE NATION ENTERTAINMENT INC COM USD0.01	Entertainment	\$2,000 - \$10,000	Stock		
WEC ENERGY GROUP INC COM	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		9/7/2023
CARRIER GLOBAL CORPORATION COM	Building Products & Equipment	\$2,000 - \$10,000	Stock		
MOTOROLA SOLUTIONS INC	Communication Equipment	\$2,000 - \$10,000	Stock		
PHILLIPS 66 COM	Oil & Gas Refining & Marketing	\$2,000 - \$10,000	Stock		8/7/2023
RESMED INC	Medical Instruments & Supplies	\$2,000 - \$10,000	Stock		
TAKE-TWO INTERACTIVE SOFTWARE INC	Electronic Gaming & Multimedia	\$2,000 - \$10,000	Stock		
CLOROX CO COM USD1.00	Household & Personal Products	\$2,000 - \$10,000	Stock		10/9/2023
KIMCO REALTY CORP COM USD0.01	REIT—Retail	\$2,000 - \$10,000	Stock		5/5/2023
SOUTHWEST AIRLINES CO	Airlines	\$2,000 - \$10,000	Stock		

NAME OF BUSINESS ENTITY	GENERAL DESCRIPTION OF THIS BUSINESS ACTIVITY	FAIR MARKET VALUE (Select from drop down list)	NATURE OF INVESTMENT (Select from drop down list. If "other," describe)	IF APPLICABLE, LIST DATE (mm/dd/yyyy)	
				ACQUIRED	DISPOSED
LENNAR CORP COM USD0.10 CLASS A	Residential Construction	\$2,000 - \$10,000	Stock		
ETSY INC COM	Consumer Cyclical	\$2,000 - \$10,000	Stock		10/9/2023
FEDERAL RLTY INV'TR NEW SH BEN INT NEW	REIT—Retail	\$2,000 - \$10,000	Stock		10/9/2023
CONSTELLATION BRANDS INC COM USD0.01 CLASS A	Beverages—Wineries & Distilleries	\$2,000 - \$10,000	Stock		
CME GROUP INC COM	Financial Data & Stock Exchanges	\$2,000 - \$10,000	Stock		
CF INDUSTRIES HOLDINGS INC COM USD0.01	Agricultural Inputs	\$2,000 - \$10,000	Stock		4/9/2023
INGERSOLL RAND INC COM	Specialty Industrial Machinery	\$2,000 - \$10,000	Stock		
MARATHON PETROLEUM CORP COM USD0.01	Oil & Gas Refining & Marketing	\$2,000 - \$10,000	Stock		
GOLDMAN SACHS GROUP INC COM USD0.01	Capital Markets	\$2,000 - \$10,000	Stock		
PIIONEER NATURAL RESOURCES CO COM USD0.01	Oil & Gas Exp	\$2,000 - \$10,000	Stock		
DAVITA INC COM	Medical Care Facilities	\$2,000 - \$10,000	Stock	3/3/2023	
FORTIVE CORP COM	Scientific & Technical Instruments	\$2,000 - \$10,000	Stock		
GARTNER INC COM USD0.0005	Information Technology Services	\$2,000 - \$10,000	Stock		
VERISIGN INC	Software—Infrastructure	\$2,000 - \$10,000	Stock		4/3/2023
ALEXANDRIA REAL ESTATE EQUITIES COM USD0.01	REIT—Office	\$2,000 - \$10,000	Stock		4/3/2023
ASSURANT INC	Insurance—Specialty	\$2,000 - \$10,000	Stock		4/3/2023
CVS HEALTH CORPORATION COM USD0.01	Healthcare Plans	\$2,000 - \$10,000	Stock		
LAM RESEARCH CORP COM USD0.001	Semiconductor Equipment & Materials	\$2,000 - \$10,000	Stock		
BECTON DICKINSON & CO COM USD1.00	Medical Instruments & Supplies	\$2,000 - \$10,000	Stock		
VIO PPTY'S INC COM	REIT—Diversified	\$2,000 - \$10,000	Stock		
ApTV P.L.C COM USD0.01 ISIN #LE00B783TV65 SEDOL #B783TV6	Auto Parts	\$2,000 - \$10,000	Stock		11/9/2023
RALPH LAUREN CORP	Apparel Manufacturing	\$2,000 - \$10,000	Stock		
LKQ CORP	Auto Parts	\$2,000 - \$10,000	Stock		11/9/2023
XYLEM INC COM USD0.01	Specialty Industrial Machinery	\$2,000 - \$10,000	Stock		
LUMEN TECHNOLOGIES INC COM	Telecom Services	\$2,000 - \$10,000	Stock	3/3/2023	4/3/2023
ESSEX PROPERTY TRUST INC COM USD0.0001	REIT—Residential	\$2,000 - \$10,000	Stock	3/3/2023	4/3/2023
VENTAS INC	REIT—Healthcare Facilities	\$2,000 - \$10,000	Stock		8/7/2023
WALGREENS BOOTS ALLIANCE INC	Pharmaceutical Retailers	\$2,000 - \$10,000	Stock	3/3/2023	4/3/2023
M & T BANK CORP COM USD0.50	Banks—Regional	\$2,000 - \$10,000	Stock		10/9/2023
BROWN-FORMAN CORP COM USD0.15 CLASS B	Beverages—Wineries & Distilleries	\$2,000 - \$10,000	Stock		
TELEFONYE TECHNOLOGIES INC	Scientific & Technical Instruments	\$2,000 - \$10,000	Stock		
L3HARRIS TECHNOLOGIES INC COM	Aerospace & Defense	\$2,000 - \$10,000	Stock	3/3/2023	4/3/2023
SIMON PROPERTY GROUP INC	REIT—Retail	\$2,000 - \$10,000	Stock		
ILLUMINA INC COM USD0.01	Diagnostics & Research	\$2,000 - \$10,000	Stock		8/7/2023
BATH & BODY WORKS INC COMMON STOCK	Specialty Retail	\$2,000 - \$10,000	Stock		
APA CORPORATION COM	Oil & Gas Exp	\$2,000 - \$10,000	Stock		
HESS CORPORATION COM USD1.00	Oil & Gas Exp	\$2,000 - \$10,000	Stock		
CORTEVA INC COM	Agricultural Inputs	\$2,000 - \$10,000	Stock		
INTUIT INC	Software—Application	\$2,000 - \$10,000	Stock		
INCYTE CORP	Healthcare	\$2,000 - \$10,000	Stock		10/9/2023
CATALENT INC COM	Drug Manufacturers—Specialty & Generic	\$2,000 - \$10,000	Stock		11/9/2023
KROGER CO COM USD1.00	Grocery Stores	\$2,000 - \$10,000	Stock		
KEYSIGHT TECHNOLOGIES INC COM USD0.01 WID	Scientific & Technical Instruments	\$2,000 - \$10,000	Stock		11/9/2023
REGENERON PHARMACEUTICALS INC	Biotechnology	\$2,000 - \$10,000	Stock	3/3/2023	
LAS VEGAS SANDS CORP COM USD0.001	Resorts & Casinos	\$2,000 - \$10,000	Stock		
AMERISOURCEBERGEN CORPORATION COM USD0.01	Medical Distribution	\$2,000 - \$10,000	Stock		
PUBLIC SVC ENTERPRISE GRP INC COM	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		
ALLSTATE CORP COM USD0.01	Insurance—Property & Casualty	\$2,000 - \$10,000	Stock		
ALBEMARLE CORP COM USD0.01	Specialty Chemicals	\$2,000 - \$10,000	Stock		5/5/2023
CASEARS ENTERTAINMENT INC NEW COM	Resorts & Casinos	\$2,000 - \$10,000	Stock		

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				ACQUIRED	DISPOSED
HCA HEALTHCARE INC COM	Medical Care Facilities	\$2,000 - \$10,000	Stock		
FOX CORP CL A COM	Entertainment	\$2,000 - \$10,000	Stock		
MONSTER BEVERAGE CORP NEW COM	Beverages—Non-Alcoholic	\$2,000 - \$10,000	Stock		
DIAMONDBACK ENERGY INC COM USD0.01	Oil & Gas E&P	\$2,000 - \$10,000	Stock	3/31/2023	9/7/2023
EDWARDS LIFESCIENCES CORP	Medical Devices	\$2,000 - \$10,000	Stock		
LABORATORY CORP AMER HLDGS COM USD0.1	Diagnostics & Research	\$2,000 - \$10,000	Stock		
SHERWIN-WILLIAMS CO	Technology	\$2,000 - \$10,000	Stock	3/31/2023	
CORNING INC	Specialty Chemicals	\$2,000 - \$10,000	Stock		
FIDELITY NATL INFORMATION SERVICES COM USD0.01	Electronic Components	\$2,000 - \$10,000	Stock		10/9/2023
CONSTELLATION ENERGY CORP COM	Information Technology Services	\$2,000 - \$10,000	Stock		4/3/2023
UNITED AIRLS HLDGS INC COM	Utilities—Renewable	\$2,000 - \$10,000	Stock		
MARATHON OIL CORP COM	Oil & Gas E&P	\$2,000 - \$10,000	Stock		
NORWEGIAN CRUISE LINE HLDG LTD SHS	Travel Services	\$2,000 - \$10,000	Stock		
HALL BURTON CO COM USD2.50	Oil & Gas Equipment & Services	\$2,000 - \$10,000	Stock		
MOJUNA HEALTHCARE INC	Healthcare Plans	\$2,000 - \$10,000	Stock		
TRAVELERS COMPANIES INC COM STK NPV	Insurance—Property & Casualty	\$2,000 - \$10,000	Stock		
BIOGEN INC COM USD0.0005	Drug Manufacturers—General	\$2,000 - \$10,000	Stock		
ULTA BEAUTY INC COM	Specialty Retail	\$2,000 - \$10,000	Stock		
BEST BUY CO INC COM USD0.10	Specialty Retail	\$2,000 - \$10,000	Stock		
GARMIN LTD COM CHF10.00	Scientific & Technical Instruments	\$2,000 - \$10,000	Stock		5/5/2023
GENERAC HLDGS INC COM USD0.01	Specialty Industrial Machinery	\$2,000 - \$10,000	Stock		
JACOBS SOLUTIONS INC COM	Engineering & Construction	\$2,000 - \$10,000	Stock		
HERSHEY COMPANY COM USD1.00	Confectioners	\$2,000 - \$10,000	Stock		
HOST HOTELS & RESORTS INC COM	REIT—Hotel & Motel	\$2,000 - \$10,000	Stock		
FASTENAL COM STK USD0.01	Industrial Distribution	\$2,000 - \$10,000	Stock	1/30/2023	
ECOLAB INC	Specialty Chemicals	\$2,000 - \$10,000	Stock		
CELLANESE CORP DEL COM	Chemicals	\$2,000 - \$10,000	Stock		
WILLIAMS COS INC COM	Oil & Gas Midstream	\$2,000 - \$10,000	Stock		
AMERICAN ELEC PWR CO INC COM	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		9/7/2023
ROSS STORES INC	Apparel Retail	\$2,000 - \$10,000	Stock		
EXPEDITORS INTERNATIONAL OF WASHINGTON INC	Integrated Freight & Logistics	\$2,000 - \$10,000	Stock		
EQT CORP COM	Oil & Gas E&P	\$2,000 - \$10,000	Stock		
CMS ENERGY CORP COM USD0.01	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		4/3/2023
AMERICAN WATER WORKS COMPANY INC COM USD0.01	Utilities—Regulated Water	\$2,000 - \$10,000	Stock		
FACTSET RESEARCH SYSTEMS INC	Financial Data & Stock Exchanges	\$2,000 - \$10,000	Stock		
LAMB WESTON HLDGS INC COM	Packaged Foods	\$2,000 - \$10,000	Stock		
GENERAL MILLS INC COM USD0.10	Packaged Foods	\$2,000 - \$10,000	Stock		
DEVON ENERGY CORP NEW	Oil & Gas E&P	\$2,000 - \$10,000	Stock		
SYSCO CORP	Food Distribution	\$2,000 - \$10,000	Stock		9/7/2023
PTC INC	Software—Application	\$2,000 - \$10,000	Stock		
CARDINAL HEALTH INC COM NPV	Medical Distribution	\$2,000 - \$10,000	Stock		
STERIS PLC ORD USD0.001	Medical Devices	\$2,000 - \$10,000	Stock		
CONSOLIDATED EDISON INC COM USD0.10	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		11/9/2023
ALLIANT ENERGY CORP COM USD0.01	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		
HOWMET AEROSPACE INC COM	Aerospace & Defense	\$2,000 - \$10,000	Stock		
JUNIPER NETWORKS COM USD0.00001	Communication Equipment	\$2,000 - \$10,000	Stock		10/9/2023
GENUINE PARTS CO COM USD1.00	Specialty Retail	\$2,000 - \$10,000	Stock		
EDISON INTERNATIONAL	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		
PAYCHEX INC COM USD0.01	Staffing & Employment Services	\$2,000 - \$10,000	Stock		

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				ACQUIRED	DISPOSED
ATMOS ENERGY CORP COM NPV	Utilities—Regulated Gas	\$2,000 - \$10,000	Stock		
AMEREN CORP COM USD0.01	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		10/9/2023
KINDER MORGAN INC COM USD0.01	Oil & Gas Midstream	\$2,000 - \$10,000	Stock		
RAYMOND JAMES FINL INC COM	Capital Markets	\$2,000 - \$10,000	Stock		5/5/2023
MGM RESORTS INTERNATIONAL COM USD0.01	Resorts & Casinos	\$2,000 - \$10,000	Stock		
DOVER CORP COM USD1.00	Specialty Industrial Machinery	\$2,000 - \$10,000	Stock		
EPAM SYS INC COM USD0.001	Information Technology Services	\$2,000 - \$10,000	Stock		
SMUCKER J M CO COM NEW	Packaged Foods	\$2,000 - \$10,000	Stock		
ONEOK INC COM USD0.01	Oil & Gas Midstream	\$2,000 - \$10,000	Stock		
FMC CORP COM NEW	Agricultural Inputs	\$2,000 - \$10,000	Stock		8/7/2023
IRON MTN INC DEL COM	REIT—Specialty	\$2,000 - \$10,000	Stock		
CENTERPOINT ENERGY INC COM STX USD0.01	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		
AKAMAI TECHNOLOGIES COM USD0.01	Software—Infrastructure	\$2,000 - \$10,000	Stock		3/3/2023
CITIGROUP INC	Banks—Diversified	\$2,000 - \$10,000	Stock	1/30/2023	3/3/2023
DOMINION ENERGY INC COM	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock		3/3/2023
DOLLAR GEN CORP NEW COM	Discount Stores	\$2,000 - \$10,000	Stock		3/3/2023
DISH NETWORK CORPORATION CL A	Telecom Services	\$2,000 - \$10,000	Stock		3/3/2023
ELECTRONIC ARTS INC	Electronic Gaming & Multimedia	\$2,000 - \$10,000	Stock		3/3/2023
GEN DIGITAL INC COM	Software—Infrastructure	\$2,000 - \$10,000	Stock		3/3/2023
HASBRO INC COM USD0.50	Leisure	\$2,000 - \$10,000	Stock		3/3/2023
HORMEL FOODS CORP	Packaged Foods	\$2,000 - \$10,000	Stock		3/3/2023
KEURIG DR PEPPER INC COM	Beverages—Non-Alcoholic	\$2,000 - \$10,000	Stock		3/3/2023
3M CO	Conglomerates	\$2,000 - \$10,000	Stock		1/30/2023
Vornado Realty Trust	REIT - Office	\$2,000 - \$10,000	Stock		
Republic Services, Inc.	Waste Management	\$2,000 - \$10,000	Stock	1/30/2023	3/3/2023
NINE INC CLASS B COM NPV	Footwear & Accessories	\$2,000 - \$10,000	Stock	1/30/2023	3/3/2023
PHILIP MORRIS INTERNATIONAL INC COM NPV	Tobacco	\$2,000 - \$10,000	Stock	1/30/2023	3/3/2023
QUALCOMM INC	Semiconductors	\$2,000 - \$10,000	Stock		9/7/2023
BOSTON PROPERTIES INC COM	REIT—Office	\$2,000 - \$10,000	Stock		5/5/2023
CROWN CASTLE INC COM	REIT—Specialty	\$2,000 - \$10,000	Stock		3/3/2023
BAXTER INTERNATIONAL INC COM USD1.00	Medical Instruments & Supplies	\$2,000 - \$10,000	Stock		10/9/2023
AKAMAI TECHNOLOGIES COM USD0.01	Software—Infrastructure	\$2,000 - \$10,000	Stock	3/3/2023	
AMERICAN INTERNATIONAL GROUP INC	Insurance—Diversified	\$2,000 - \$10,000	Stock	4/3/2023	
CITIGROUP INC	Banks—Diversified	\$2,000 - \$10,000	Stock	4/3/2023	9/7/2023
CITIZENS FINL GROUP INC COM	Banks—Regional	\$2,000 - \$10,000	Stock	4/3/2023	5/5/2023
COGNIZANT TECHNOLOGY SOLUTIONS CORP COM CL A USD0.01	Information Technology Services	\$2,000 - \$10,000	Stock	4/3/2023	5/5/2023
CROWN CASTLE INC COM	REIT—Specialty	\$2,000 - \$10,000	Stock	4/3/2023	5/5/2023
FIRST REPUBLIC BANK SAN FRANCISCO COM USD0.01	Banks—Regional	\$2,000 - \$10,000	Stock	4/3/2023	5/5/2023
KEYCORP COM	Banks—Regional	\$2,000 - \$10,000	Stock	4/3/2023	5/5/2023
LEIDOS HOLDINGS INC COM	Information Technology Services	\$2,000 - \$10,000	Stock	4/3/2023	8/7/2023
NIKE INC CLASS B COM NPV	Footwear & Accessories	\$2,000 - \$10,000	Stock	4/3/2023	
PHILIP MORRIS INTERNATIONAL INC COM NPV	Tobacco	\$2,000 - \$10,000	Stock	4/3/2023	5/5/2023
US BANCORP	Banks—Regional	\$2,000 - \$10,000	Stock	4/3/2023	5/5/2023
ZIONS BANCORPORATION N A COM	Banks—Regional	\$2,000 - \$10,000	Stock	4/3/2023	5/5/2023
WELLS FARGO CO NEW COM	Banks—Diversified	\$2,000 - \$10,000	Stock	5/5/2023	
V F CORP COM NPV	Apparel Manufacturing	\$2,000 - \$10,000	Stock	5/5/2023	8/7/2023
TRUIST FINL CORP COM	Banks—Regional	\$2,000 - \$10,000	Stock	5/5/2023	
QUALCOMM INC	Semiconductors	\$2,000 - \$10,000	Stock	5/5/2023	
PNC FINANCIAL SERVICES GROUP COM USD0	Banks—Regional	\$2,000 - \$10,000	Stock	5/5/2023	
Match Group, Inc.	Internet Content & Information	\$2,000 - \$10,000	Stock	5/5/2023	11/9/2023

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				ACQUIRED	DISPOSED
M & B BANK CORP COM USD0.50	Banks—Regional	\$2,000 - \$10,000	Stock	5/5/2023	
LHARRIS TECHNOLOGIES INC COM	Aerospace & Defense	\$2,000 - \$10,000	Stock	5/5/2023	6/7/2023
Fifth Third Bancorp	Banks - Regional	\$2,000 - \$10,000	Stock	5/5/2023	
EQT CORP COM	Oil & Gas E&P	\$2,000 - \$10,000	Stock	5/5/2023	
DOMINION ENERGY INC COM	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock	5/5/2023	8/7/2023
DexCom, Inc.	Medical Devices	\$2,000 - \$10,000	Stock	5/5/2023	6/7/2023
DXC Technology Company	Information Technology Services	\$2,000 - \$10,000	Stock	5/5/2023	
Costar Group, Inc.	Real Estate Services	\$2,000 - \$10,000	Stock	5/5/2023	9/7/2023
CVS HEALTH CORPORATION COM USD0.01	Healthcare Plans	\$2,000 - \$10,000	Stock	5/5/2023	
CF INDUSTRIES HOLDINGS INC COM USD0.01	Agricultural Inputs	\$2,000 - \$10,000	Stock	5/5/2023	
BOSTON PROPERTIES INC COM	REIT—Office	\$2,000 - \$10,000	Stock	5/5/2023	
BorgWarner Inc.	Auto Parts	\$2,000 - \$10,000	Stock	5/5/2023	
ALEXANDRIA REAL ESTATE EQUITIES COM USD0.01	REIT—Office	\$2,000 - \$10,000	Stock	5/5/2023	11/9/2023
Xcel Energy Inc.	Utilities - Regulated Electric	\$2,000 - \$10,000	Stock	9/7/2023	9/7/2023
Tapscott, Inc.	Luxury Goods	\$2,000 - \$10,000	Stock	8/7/2023	6/7/2023
SCHWAB CHARLES CORP COM	Capital Markets	\$2,000 - \$10,000	Stock	8/7/2023	8/7/2023
Oryzon & Co.	Drug Manufacturers - General	\$2,000 - \$10,000	Stock	8/7/2023	10/9/2023
HASBRO INC COM USD0.50	Leisure	\$2,000 - \$10,000	Stock	8/7/2023	9/7/2023
Extra Space Storage Inc.	REIT - Industrial	\$2,000 - \$10,000	Stock	8/7/2023	10/9/2023
DOLLAR GEN CORP NEW COM	Discount Stores	\$2,000 - \$10,000	Stock	8/7/2023	9/7/2023
CROWN CASTLE INC COM	REIT—Specialty	\$2,000 - \$10,000	Stock	8/7/2023	9/7/2023
Bio-Rad Laboratories, Inc.	Medical Devices	\$2,000 - \$10,000	Stock	8/7/2023	
Advance Auto Parts, Inc.	Specialty Retail	\$2,000 - \$10,000	Stock	8/7/2023	9/7/2023
AT&T INC COM USD1	Telecom Services	\$2,000 - \$10,000	Stock	8/7/2023	
PHINIA Inc.	Auto Parts	\$2,000 - \$10,000	Stock	5/5/2023	8/7/2023
Fortra Holdings Inc.	Biotechnology	\$2,000 - \$10,000	Stock	9/7/2023	
WALGREENS BOOTS ALLIANCE INC	Pharmaceutical Retailers	\$2,000 - \$10,000	Stock	9/7/2023	10/9/2023
VERIZON COMMUNICATIONS INC	Telecom Services	\$2,000 - \$10,000	Stock	9/7/2023	10/9/2023
TARGET CORP	Discount Stores	\$2,000 - \$10,000	Stock	9/7/2023	11/9/2023
PAYPAL HLDS INC COM	Credit Services	\$2,000 - \$10,000	Stock	9/7/2023	
NIKE INC CLASS B COM NPV	Footwear & Accessories	\$2,000 - \$10,000	Stock	9/7/2023	
MODERNA INC COM	Biotechnology	\$2,000 - \$10,000	Stock	9/7/2023	11/9/2023
Insulet Corporation	Medical Devices	\$2,000 - \$10,000	Stock	9/7/2023	10/9/2023
ILLUMINA INC COM USD0.01	Diagnostics & Research	\$2,000 - \$10,000	Stock	9/7/2023	10/9/2023
HORMEL FOODS CORP	Packaged Foods	\$2,000 - \$10,000	Stock	9/7/2023	11/9/2023
FedEx Corporation	Integrated Freight & Logistics	\$2,000 - \$10,000	Stock	9/7/2023	
FMC CORP COM NEW	Agricultural Inputs	\$2,000 - \$10,000	Stock	8/7/2023	10/9/2023
EVERSOURCE ENERGY	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock	9/7/2023	10/9/2023
Energy, Inc.	Utilities - Regulated Electric	\$2,000 - \$10,000	Stock	9/7/2023	10/9/2023
DOMINION ENERGY INC COM	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock	9/7/2023	10/9/2023
DTE Energy Company	Utilities - Regulated Electric	\$2,000 - \$10,000	Stock	9/7/2023	10/9/2023
Conagra Brands, Inc.	Packaged Foods	\$2,000 - \$10,000	Stock	9/7/2023	
W. R. Berkley Corporation	Insurance - Property & Casualty	\$2,000 - \$10,000	Stock	9/7/2023	
AMERICAN TOWER CORP NEW COM	REIT—Specialty	\$2,000 - \$10,000	Stock	9/7/2023	10/9/2023
ALBERMARLE CORP COM USD0.01	Specialty Chemicals	\$2,000 - \$10,000	Stock	10/9/2023	
Xcel Energy Inc.	Utilities - Regulated Electric	\$2,000 - \$10,000	Stock	10/9/2023	
V F CORP COM NPV	Apparel Manufacturing	\$2,000 - \$10,000	Stock	10/9/2023	
UNITED PARCEL SERVICE INC CL B	Integrated Freight & Logistics	\$2,000 - \$10,000	Stock	10/9/2023	11/9/2023
SOUTHWEST AIRLINES CO	Airlines	\$2,000 - \$10,000	Stock	10/9/2023	11/9/2023

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				ACQUIRED	DISPOSED
Sealed Air Corporation	Packaging & Containers	\$2,000 - \$10,000	Stock	10/9/2023	
SCHWAB CHARLES CORP COM	Capital Markets	\$2,000 - \$10,000	Stock	10/9/2023	
RESMED INC	Medical Instruments & Supplies	\$2,000 - \$10,000	Stock	10/9/2023	
Realty Income Corporation	REIT - Retail	\$2,000 - \$10,000	Stock	10/9/2023	
Public Storage	REIT - Industrial	\$2,000 - \$10,000	Stock	10/9/2023	11/9/2023
Revvvy, Inc.	Diagnostics & Research	\$2,000 - \$10,000	Stock	10/9/2023	
Palo Alto Networks, Inc.	Software - Infrastructure	\$2,000 - \$10,000	Stock	10/9/2023	
Orgation & Co.	Drug Manufacturers - General	\$2,000 - \$10,000	Stock	10/9/2023	11/9/2023
NORFOLK SOUTHN CORP COM	Railroads	\$2,000 - \$10,000	Stock	10/9/2023	
NEXTERA ENERGY INC COM USD0.01	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock	10/9/2023	
The Messia Company	Agricultural Inputs	\$2,000 - \$10,000	Stock	10/9/2023	11/9/2023
ESTEE LAUDER COMPANIES INC COM USD0.01 CLASS A	Household & Personal Products	\$2,000 - \$10,000	Stock	10/9/2023	
LSHARRIS TECHNOLOGIES INC COM	Aerospace & Defense	\$2,000 - \$10,000	Stock	10/9/2023	
The Kraft Heinz Company	Packaged Foods	\$2,000 - \$10,000	Stock	10/9/2023	
INTERNATIONAL FLAVORS & FRAGRANCES COM USD0.125	Specialty Chemicals	\$2,000 - \$10,000	Stock	10/9/2023	
Finisenergy Corp.	Utilities - Regulated Electric	\$2,000 - \$10,000	Stock	10/9/2023	
Energy Corporation	Utilities - Regulated Electric	\$2,000 - \$10,000	Stock	10/9/2023	
EDWARDS LIFESCIENCES CORP	Medical Devices	\$2,000 - \$10,000	Stock	10/9/2023	11/9/2023
DOLLAR TREE INC	Discount Stores	\$2,000 - \$10,000	Stock	10/9/2023	
DOLLAR GEN CORP NEW COM	Discount Stores	\$2,000 - \$10,000	Stock	10/9/2023	
DexCom, Inc.	Medical Devices	\$2,000 - \$10,000	Stock	10/9/2023	
CITICORP INC	Bank—Diversified	\$2,000 - \$10,000	Stock	10/9/2023	
CVS HEALTH CORPORATION COM USD0.01	Healthcare Plans	\$2,000 - \$10,000	Stock	10/9/2023	
Bio-Rad Laboratories, Inc.	Medical Devices	\$2,000 - \$10,000	Stock	10/9/2023	11/9/2023
ALEXANDRIA REAL ESTATE EQUITIES COM USD0.01	REIT—Office	\$2,000 - \$10,000	Stock	10/9/2023	
AMERICAN ELEC PYUR CO INC COM	Utilities—Regulated Electric	\$2,000 - \$10,000	Stock	10/9/2023	
The AES Corporation	Utilities - Diversified	\$2,000 - \$10,000	Stock	10/9/2023	
Watts Towers Watson Public Limited Company	Insurance Brokers	\$2,000 - \$10,000	Stock	10/9/2023	
Viatis Inc.	Drug Manufacturers - Specialty & Generic	\$2,000 - \$10,000	Stock	11/9/2023	
VERIZON COMMUNICATIONS INC	Telecom Services	\$2,000 - \$10,000	Stock	11/9/2023	
TARGET CORP	Discount Stores	\$2,000 - \$10,000	Stock	11/9/2023	
RAYTHEON TECHNOLOGIES CORP COM	Aerospace & Defense	\$2,000 - \$10,000	Stock	11/9/2023	
Paycom Software, Inc.	Software - Application	\$2,000 - \$10,000	Stock	11/9/2023	
Nucor Corporation	Steel	\$2,000 - \$10,000	Stock	11/9/2023	
METTLER-TOLEDO INTERNATIONAL INC COM USD0.01	Diagnostics & Research	\$2,000 - \$10,000	Stock	11/9/2023	
Kenvue Inc.	Household & Personal Products	\$2,000 - \$10,000	Stock	11/9/2023	
JUNIPER NETWORKS COM USD0.00001	Communication Equipment	\$2,000 - \$10,000	Stock	11/9/2023	
ICVIA Holdings Inc.	Diagnostics & Research	\$2,000 - \$10,000	Stock	11/9/2023	
INCYTE CORP	Healthcare	\$2,000 - \$10,000	Stock	11/9/2023	
HASBRO INC COM USD0.50	Leisure	\$2,000 - \$10,000	Stock	11/9/2023	
GENERAL MTRS CO COM	Auto Manufacturers	\$2,000 - \$10,000	Stock	11/9/2023	
Fortinet, Inc.	Software - Infrastructure	\$2,000 - \$10,000	Stock	11/9/2023	
FMC CORP COM NEW	Agricultural Inputs	\$2,000 - \$10,000	Stock	11/9/2023	
Extra Space Storage Inc.	REIT - Industrial	\$2,000 - \$10,000	Stock	11/9/2023	
CROWN CASTLE INC COM	REIT—Specialty	\$2,000 - \$10,000	Stock	11/9/2023	
Charles River Laboratories International, Inc.	Diagnostics & Research	\$2,000 - \$10,000	Stock	11/9/2023	
CH ROBINSON WORLDWIDE INC COM USD0.10	Integrated Freight & Logistics	\$2,000 - \$10,000	Stock	11/9/2023	
Blackstone Inc	Asset Management	\$2,000 - \$10,000	Stock	11/9/2023	
Bio-Tecrine Corporation	Biotechnology	\$2,000 - \$10,000	Stock	11/9/2023	
BAXTER INTERNATIONAL INC COM USD1.00	Medical Instruments & Supplies	\$2,000 - \$10,000	Stock	11/9/2023	
ALBEMARLE CORP COM USD0.01	REIT—Specialty	\$2,000 - \$10,000	Stock	11/9/2023	
Airbnb, Inc.	Specialty Chemicals	\$2,000 - \$10,000	Stock	11/9/2023	
MEDTRONIC PLC	Travel Services	\$2,000 - \$10,000	Stock	11/9/2023	
Veritro Corporation	Medical Devices	\$2,000 - \$10,000	Stock	11/9/2023	
VICI Properties Inc.	Pollution & Treatment Controls	\$2,000 - \$10,000	Stock	11/9/2023	
	REIT - Diversified	\$2,000 - \$10,000	Stock	11/9/2023	

NAME OF BUSINESS ENTITY	GENERAL DESCRIPTION OF THIS BUSINESS ACTIVITY	FAIR MARKET VALUE (Select from drop down list)	NATURE OF INVESTMENT (Select from drop down list. If "other," describe)	IF APPLICABLE, LIST DATE (mm/dd/yyyy)	
				ACQUIRED	DISPOSED
ALTRIA GROUP INC	Tobacco	\$2,000 - \$10,000	Stock		2/9/2024
BRISTOL-MYERS SQUIBB CO COM	Drug Manufacturers—General	\$2,000 - \$10,000	Stock		2/9/2024
FOX CORP CL A COM	Entertainment	\$2,000 - \$10,000	Stock		2/9/2024
NEWMONT CORP COM ISIN #US6516391066 SED	Gold Mining	\$2,000 - \$10,000	Stock		2/9/2024
PFIZER INC	Drug Manufacturers—General	\$2,000 - \$10,000	Stock	2/9/2024	2/9/2024
UBER TECHNOLOGIES INC COM	Software - Applicatio	\$2,000 - \$10,000	Stock	5/9/2024	
PFIZER INC	Drug Manufacturers—General	\$2,000 - \$10,000	Stock		5/9/2024
APA CORPORATION COM	Oil & Gas E&P	\$2,000 - \$10,000	Stock		5/9/2024
WARNER BROS DISCOVERY INC COM SER A	Entertainment	\$2,000 - \$10,000	Stock		5/9/2024
ROCKWELL AUTOMATION INC COM USD1	Specialty Industrial Machinery	\$2,000 - \$10,000	Stock		5/9/2024

SCHEDULE B
Interests in Real Property
(Including Rental Income)

Name JAXI MONIQUE LAWSHE

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS
[REDACTED]

CITY LOS ANGELES

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 1/23 DISPOSED 1/23

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
DASHA BASHOUE

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS
[REDACTED]

CITY LOS ANGELES

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 1/23 DISPOSED 1/23

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
K. CARLISHE

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

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE % ☐ None TERM (Months/Years)

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

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE % ☐ None TERM (Months/Years)

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

Comments:

SCHEDULE B
Interests in Real Property
(Including Rental Income)

Name JANI MONIQUE
LAW SHE

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

[REDACTED]

CITY

LOS ANGELES

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☒ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 23 23
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

B. DRIESSEN
J. McGRATH

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

[REDACTED]

CITY

FAIR MARKET VALUE

- ☐ \$2,000 - \$10,000
☐ \$10,001 - \$100,000
☐ \$100,001 - \$1,000,000
☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 23 23
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

TERM (Months/Years)

 % ☐ None

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

TERM (Months/Years)

 % ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

- ☐ \$500 - \$1,000 ☐ \$1,001 - \$10,000
☐ \$10,001 - \$100,000 ☐ OVER \$100,000
☐ Guarantor, if applicable

Comments:



Ethics Commission
200 N Spring Street
City Hall — 24th Floor
Los Angeles, CA 90012
(213) 978-1960
ethics.lacity.org

Restricted Source Financial Disclosure Statement Form 60

Elected City officials, general managers and chief administrative officers of City agencies, members of City boards and commissions, and individuals nominated to positions subject to City Council approval must file this form in conjunction with the state Form 700. Please refer to the attached instructions for additional information.

☒ **Original Filing** ☐ **Amended Filing** (original filed on ____/____/20____)

Total Pages: 2

Name: **Lawshe, Monique**

(Last, First, Middle)

Agency: **Planning Department**

Position: **Member, City Planning Commission**

Phone: [REDACTED]

Email: [REDACTED]

Type of Statement: ☒ **Pre-confirmation** Date of nomination: 05 / 20 / 2024
 ☐ **Assuming Office** First day in position: ____ / ____ / 20____
 ☐ **Annual** ____ / ____ / 20____ through December 31, 20____
 ☐ **Leaving Office** Last day in office: ____ / ____ / 20____

I had the following interests associated with restricted sources during this reporting period:

- ☐ **1. REAL PROPERTY — section attached.**
Interests in real property leased from or to, co-owned by, purchased from, or sold to a restricted source.
- ☐ **2. INVESTMENTS — section attached.**
Investments (other than real property) co-owned by, purchased from, or sold to a restricted source.
- ☐ **3. INCOME — section attached.**
Income received from a restricted source.
- ☐ **4. GIFTS — section attached.**
Gifts, cumulatively valued at \$50 or more, received from a restricted source.
- ☒ **5. BOARD POSITIONS — section attached.**
Positions held on the board of a restricted source.

- Or -

- ☐ **6. NO INTERESTS**
I had no interests in real property, investments, income, gifts, or board positions associated with restricted sources during this reporting period.

Certification

I declare under penalty of perjury under the laws of the City of Los Angeles and the state of California that I have read the instructions for this form and the information I have provided is true and complete.

06/03/2024 08:23 PM

Date

Signature



Ethics Commission
200 N Spring Street
City Hall — 24th Floor
Los Angeles, CA 90012
(213) 978-1960
ethics.lacity.org

Form 60

Section 5 -- Board Positions

Name: **Lawshe, Monique**
(Last, First, Middle)

The following positions were held on the board of a restricted source.

Name of restricted source:

LAFH Builds

Address of restricted source:

[REDACTED]

Position Title:

Board member

Position held by:

- ☒ Me ☐ My spouse/registered domestic partner
☐ My dependent child

Name of restricted source:

Address of restricted source:

Position Title:

Position held by:

- ☐ Me ☐ My spouse/registered domestic partner
☐ My dependent child

Name of restricted source:

Address of restricted source:

Position Title:

Position held by:

- ☐ Me ☐ My spouse/registered domestic partner
☐ My dependent child

Name of restricted source:

Address of restricted source:

Position Title:

Position held by:

- ☐ Me ☐ My spouse/registered domestic partner
☐ My dependent child

Name of restricted source:

Address of restricted source:

Position Title:

Position held by:

- ☐ Me ☐ My spouse/registered domestic partner
☐ My dependent child

Name of restricted source:

Address of restricted source:

Position Title:

Position held by:

- ☐ Me ☐ My spouse/registered domestic partner
☐ My dependent child