



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Jake Auchincloss
Status: Member
State/District: MA04

FILING INFORMATION

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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
377 Commonwealth Ave LLC [OL]		None	Capital Gains, Partnership Income	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LOCATION: Boston/Suffolk, MA, US DESCRIPTION: Ownership share in LLC holding building of condominiums					
529 DC1 ⇒ American balanced fund-529F1 (CLBAX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC1 ⇒ Capital world growth and income-529F1 (FCWGX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC1 ⇒ Fundamental investors-529F1 (FFXFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC1 ⇒ The New Economy Fund-529F1 (FNEEX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC1 ⇒ Washington Mutual Investors Fund-529F1 (FWMMX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ American balanced fund-529F2 (CLBAX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
529 DC2 ⇒ EuroPacific Growth Fund-529F2 (FUEPX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ Fundamental investors-529F2 (FFXFX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ New World Fund-529F2 (NEWFX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ The New Economy Fund-529F2 (FNEEX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 DC2 ⇒ Washington Mutual Investors Fund-529F2 (FWMMX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bank of America Checking - MG [BA]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Bank of America Savings - MG [BA]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Flipside Crypto Investor Holdings, LLC ⇒ Flipside Crypto, Inc. [OT] DESCRIPTION: Investment in software-as-a-service company		None	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Geraldine Glimcher Excepted Trust [EQ]		Undetermined	Trust Distribution	\$15,001 - \$50,000	<input type="checkbox"/>
Newton house [RP] LOCATION: Newton, MA, US	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
Savings USAA TA [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Appreciated over \$1,000					
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SFP/MMLIS Individual Acct - JA ⇒ Domini Impact Bond Fund Instl Cl (DSBIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ First Trust Water (FIW) [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Hartford Schrodgers International Stock (SCIEX) [MF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EAFE (ESGD) [EF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares TR ESG AWR US Agrgt (EAGG) [EF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Pimco Total Return ESG Fund CL Instl (PTSAX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ SPDR MSCI Emerging Markets Fossil Fuel Free ETC (EEMX) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ SPDR S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Vanguard World FD ESG Intl Stk ETF (VSGX) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Vanguard World FD ESG US Stk ETF (ESGV) [EF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒	SP	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Domini Impact Bond Fund Instl Cl (DSBIX) [MF]					<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ First Trust Water (FIW) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Hartford Schrodgers International Stock (SCIEX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ iShares TR ESG AWR US Agrgt (EAGG) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Pimco Total Return ESG Fund CL Instl (PTSAX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ SPDR MSCI Emerging Markets Fossil Fuel Free ETC (EEMX) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Vanguard World FD ESG US Stk ETF (ESGV) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Government Cash Reserves (FDRXX) [MF]					<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI USA Small Cap ETF (ESML) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESC MSCI USA ETF (ESGU) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESG MSCI EAFE (ESGD) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ First Trust Water (FIW) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Hartford Schroders International Stock (SCIEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SFP/MMLIS Roth IRA - MG ⇒ Vanguard World FD ESG US Stk ETF (ESGV) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
USAA Checking - Joint [BA]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
USAA checking & savings [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
USAA Savings - Joint [BA]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
377 Commonwealth Ave LLC [OI] DESCRIPTION: Ownership share in LLC holding building of condominiums		03/31/2022	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [MF]	SP	03/31/2022	P	\$15,001 - \$50,000	
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [MF]	SP	06/30/2022	P	\$1,001 - \$15,000	
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [MF]	SP	09/30/2022	P	\$1,001 - \$15,000	
Bain 401k ⇒ Vanguard Target Retirement 2050 Tr I [MF]	SP	12/30/2022	P	\$1,001 - \$15,000	
Flipside Crypto Investor Holdings, LLC ⇒ Flipside Crypto, Inc. [OT] LOCATION: US DESCRIPTION: Sold equity interest in Flipside Crypto, Inc. back to company. COMMENTS: I sold my interest in Flipside Crypto, Inc, a company that I invested in before my election to Congress, for an amount below fair market value, as defined by the company's most recent valuation. As a Member of Congress, I had no information related to this transaction that is unavailable to members of the public. The terms of this sale and the timing would be available to any other investor upon request.		03/22/2022	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [EF]	DC	05/20/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Individual Acct - DC1 ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [EF]	DC	07/25/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [EF]	DC	10/24/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [EF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	05/20/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	07/25/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	10/24/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	DC	03/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC1 ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]	DC	03/15/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]	DC	05/20/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]	DC	05/18/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Individual Acct - DC1 ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]	DC	05/20/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [MF]	DC	05/20/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [MF]	DC	10/24/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Advanced MSCI EAFE ETF (DMXF) [MF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [MF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	DC	05/20/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG MSCI EAFE (ESGD) [MF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - DC2 ⇒ iShares TR MSCI USA ESG SLC (USXF) [MF]	DC	05/18/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ Ariel Fund (ARAIX) [MF]		10/7/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ BlackRock Strategic Municipal Opportunity Fund (MKMTX) [MF]		10/7/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Calvert Flexible Bond (CUBIX) [MF]		10/11/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ Calvert Flexible Bond (CUBIX) [MF]		11/10/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Individual Acct - JA ⇒ Calvert Responsible Muni Income (CTTIX) [MF]		10/11/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Calvert Small Cap (CSVIX) [MF]		11/10/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Domini Impact Bond Fund Instl CL (DSBIX) [MF]		10/7/2022	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ Hartford Municipal Opportunities (HHMIX) [MF]		10/7/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Hartford Schroders International Stock (SCIEX) [MF]		10/7/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ Hartford Schroders International Stock (SCIEX) [MF]		11/9/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EAFE (ESGD) [EF]		10/11/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EAFE (ESGD) [EF]		11/10/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]		10/11/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]		11/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI USA Small Cap (ESGU) [EF]		10/11/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]		10/11/2022	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]		10/11/2022	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ iShares TR ESG AWR US Agrgt (EAGG) [EF]		11/10/2022	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒		10/11/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares TR MSCI KLD400 SOC (DSI) [EF]					<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ JPMorgan High Yield Municipal Fund (JTISX) [MF]		10/7/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ JPMorgan Short-Intermediate Muni Bond (JIMIX) [MF]		10/7/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - JA ⇒ Pimco Total Return ESG Fund CL Instl (PTSAX) [MF]		10/7/2022	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - JA ⇒ SPDR S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]		10/11/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - JA ⇒ Vanguard World FD ESG Intl Stk ETF (VSGK) [EF]		11/10/2022	P	\$50,001 - \$100,000	
SFP/MMLIS Individual Acct - JA ⇒ Vanguard World FD ESG US Stk ETF (ESGV) [EF]		11/10/2022	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - MG ⇒ Ariel Fund (ARAIX) [MF]	SP	10/7/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ BlackRock Strategic Municipal Opportunity Fund (MKMTX) [MF]	SP	10/7/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Calvert Flexible Bond (CUBIX) [MF]	SP	10/11/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - MG ⇒ Calvert Flexible Bond (CUBIX) [MF]	SP	11/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Calvert Responsible Muni Income (CTTIX) [MF]	SP	10/11/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Calvert Small Cap (CSVIX) [MF]	SP	11/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Domini Impact Bond Fund Instl CL (DSBIX) [MF]	SP	10/7/2022	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - MG ⇒	SP	10/11/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
First Trust Water (FIW) [EF]					
SFP/MMLIS Individual Acct - MG ⇒ Hartford Municipal Opportunities (HHMIX) [MF]	SP	10/7/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Hartford Schroders International Stock (SCIEX) [MF]	SP	10/7/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	SP	10/11/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]	SP	10/11/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - MG ⇒ iShares ESG MSCI USA Small Cap (ESML) [EF]	SP	10/11/2022	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - MG ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]	SP	10/11/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - MG ⇒ iShares TR ESG AWR US Agrgt (EAGG) [EF]	SP	11/10/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Individual Acct - MG ⇒ JPMorgan High Yield Municipal Fund (JTISX) [MF]	SP	10/7/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ JPMorgan Short-Intermediate Muni Bond (JIMIX) [MF]	SP	10/7/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Individual Acct - MG ⇒ Pimco Total Return ESG Fund CL Instl (PTSAX) [MF]	SP	10/7/2022	P	\$15,001 - \$50,000	
SFP/MMLIS Individual Acct - MG ⇒ Vanguard World FD ESG US Stk ETF (ESGV) [EF]	SP	11/10/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [EF]		05/20/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [EF]		07/25/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ Blackrock ETF Trust US Carbon Transition (LCTU) [EF]		10/24/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Roth IRA - JA ⇒ iShares ESG MSCI EM ETF (ESGE) [EF]		05/20/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESC MSCI USA ETF (ESGU) [EF]		05/20/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESC MSCI USA ETF (ESGU) [EF]		07/25/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESC MSCI USA ETF (ESGU) [EF]		10/24/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESG MSCI EAFE (ESGD) [EF]		01/31/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR ESG MSCI EAFE (ESGD) [EF]		03/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		01/31/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		03/15/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI KLD400 SOC (DSI) [EF]		05/20/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - JA ⇒ iShares TR MSCI USA ESG SLC (USXF) [EF]		05/20/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Ariel Fund (ARAIX) [MF]	SP	11/10/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ Calvert Small Cap (CSVIX) [MF]	SP	11/14/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ First Trust Water (FIW) [EF]	SP	11/14/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - MG ⇒ Hartford Schroders International Stock (SCIEX) [MF]	SP	11/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG MSCI EAFE (ESGD) [EF]	SP	07/27/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - MG ⇒ iShares ESG MSCI USA Small Cap (ESGU) [EF]	SP	11/14/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ iShares MSCI USA ESG SLC (SUSA) [EF]	SP	11/14/2022	P	\$15,001 - \$50,000	
SFP/MMLIS Roth IRA - MG ⇒ S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]	SP	07/27/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
SFP/MMLIS Roth IRA - MG ⇒ SPDR S&P 500 Fossil Fuel Reserves Free (SPYX) [EF]	SP	11/14/2022	P	\$1,001 - \$15,000	
SFP/MMLIS Roth IRA - MG ⇒ Vanguard World FD ESG US Stk ETF (ESGV) [EF]	SP	11/14/2022	P	\$50,001 - \$100,000	

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Bain & Company	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Metro Credit Union	2018	Mortgage primary residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation	06/26/2022	07/2/2022	Boston, MA - Israel - Boston, MA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none">o 529 DC1 (Owner: DC) LOCATION: MAo 529 DC2 (Owner: DC) LOCATION: VAo Bain 401k (Owner: SP)o Flipside Crypto Investor Holdings, LLC LOCATION: US DESCRIPTION: Investment in software-as-a-service companyo SFP/MMLIS Individual Acct - DC1 (Owner: DC) LOCATION: USo SFP/MMLIS Individual Acct - DC2 (Owner: DC) LOCATION: USo SFP/MMLIS Individual Acct - JA LOCATION: USo SFP/MMLIS Individual Acct - MG (Owner: SP) LOCATION: USo SFP/MMLIS Roth IRA - JAo SFP/MMLIS Roth IRA - MG (Owner: SP)
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EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

Yes No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes No

Yes No

CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Jake Auchincloss , 05/5/2023