

**STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT**

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

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

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

California Institute for Regenerative Medicine

Division, Board, Department, District, if applicable

Your Position

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

Agency: _____ Position: _____ Member - Independent Citizens' Oversight Committee

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

- ☒ State ☐ Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
- ☐ Multi-County _____ ☐ County of _____
- ☐ City of _____ ☐ Other _____

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

- ☒ **Annual:** The period covered is January 1, 2022, through December 31, 2022.
-or- The period covered is ____/____/____, through December 31, 2022.
- ☐ **Leaving Office:** Date Left ____/____/____ (Check one circle.)
☐ The period covered is January 1, 2022, through the date of leaving office.
-or- ☐ The period covered is ____/____/____, through the date of leaving office.
- ☐ **Assuming Office:** Date assumed ____/____/____
- ☐ **Candidate:** Date of Election _____ and office sought, if different than Part 1: _____

4. Schedule Summary (required)

► Total number of pages including this cover page: 32

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)
601 Gateway Blvd., Ste. 400 South San Francisco CA 94080

DAYTIME TELEPHONE NUMBER EMAIL ADDRESS
(510) 340-9101 stevejue@hotmail.com

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

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

Date Signed March 20, 2023
(month, day, year)

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

SCHEDULE A-1**Investments****Stocks, Bonds, and Other Interests**

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name

Stephen Juelsgaard

▶ NAME OF BUSINESS ENTITY

Starwood Opportunity Fund VIII

GENERAL DESCRIPTION OF THIS BUSINESS

Real Estate Investing

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 ____/____/22 ____/____/22
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Blackstone GSO Capital Solutions LP

GENERAL DESCRIPTION OF THIS BUSINESS

Business Lending

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 ____/____/22 ____/____/22
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

HPS - Core Senior Lending Fund

GENERAL DESCRIPTION OF THIS BUSINESS

Business Lending

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 ____/____/22 ____/____/22
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Starwood Opportunity Fund IX

GENERAL DESCRIPTION OF THIS BUSINESS

Real Estate Investing

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 ____/____/22 ____/____/22
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GSO Capital Solutions Fund II LP

GENERAL DESCRIPTION OF THIS BUSINESS

Business Lending

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 ____/____/22 ____/____/22
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

Apollo EPF III Private Investors

GENERAL DESCRIPTION OF THIS BUSINESS

Business Lending

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 ____/____/22 ____/____/22
 ACQUIRED DISPOSED

Comments: _____

SCHEDULE A-1**Investments****Stocks, Bonds, and Other Interests**

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Stephen Juelsgaard

▶ NAME OF BUSINESS ENTITY

SFC Riverview Ranch Investors LP

GENERAL DESCRIPTION OF THIS BUSINESS

Apartment Ownership

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

SFC Eastlake Investors

GENERAL DESCRIPTION OF THIS BUSINESS

Apartment Ownership

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

FT Ventures III

GENERAL DESCRIPTION OF THIS BUSINESS

Financial Services Investing

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

SFC Park Knolls Investors LP

GENERAL DESCRIPTION OF THIS BUSINESS

Apartment Ownership

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

SFC Stonegate Village Investors LP

GENERAL DESCRIPTION OF THIS BUSINESS

Apartment Ownership

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

FT Ventures IV

GENERAL DESCRIPTION OF THIS BUSINESS

Financial Services Investing

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

Comments:

SCHEDULE A-1**Investments****Stocks, Bonds, and Other Interests**

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Stephen Juelsgaard

► NAME OF BUSINESS ENTITY
Avista Capital Opportunities LP

GENERAL DESCRIPTION OF THIS BUSINESS
Private Equity Investing

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

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

IF APPLICABLE, LIST DATE:
 _____ / _____ / **22** _____ / _____ / **22**
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Dyal Capital Partners V Onshore LP

GENERAL DESCRIPTION OF THIS BUSINESS
Private Equity Investing

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

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

IF APPLICABLE, LIST DATE:
 _____ / _____ / **22** _____ / _____ / **22**
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
Private Equity Opportunities Onshore Feeder Fund LP

GENERAL DESCRIPTION OF THIS BUSINESS
Private Equity Investing

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

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

IF APPLICABLE, LIST DATE:
 _____ / _____ / **22** _____ / _____ / **22**
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
DGP Onshore Feeder Fund IV LP

GENERAL DESCRIPTION OF THIS BUSINESS
Private Equity Investing

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

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

IF APPLICABLE, LIST DATE:
 _____ / _____ / **22** _____ / _____ / **22**
 ACQUIRED DISPOSED

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

GENERAL DESCRIPTION OF THIS BUSINESS
Pre-IPO Company Investing

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

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

IF APPLICABLE, LIST DATE:
 _____ / _____ / **22** _____ / _____ / **22**
 ACQUIRED DISPOSED

► NAME OF BUSINESS ENTITY
TRG Growth Partnership

GENERAL DESCRIPTION OF THIS BUSINESS
Private Equity Investing

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

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

IF APPLICABLE, LIST DATE:
 _____ / _____ / **22** _____ / _____ / **22**
 ACQUIRED DISPOSED

Comments: _____

SCHEDULE A-1**Investments****Stocks, Bonds, and Other Interests**

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name:

Stephen Juelsgaard

▶ NAME OF BUSINESS ENTITY

CRP Opportunities Fund LP

GENERAL DESCRIPTION OF THIS BUSINESS

Real Estate Investing

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /22 / /22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

NGT II Onshore Feeder LP

GENERAL DESCRIPTION OF THIS BUSINESS

Private Equity Investing

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /22 / /22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /22 / /22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

CMMO Crestline Onshore Feeder Fund LP

GENERAL DESCRIPTION OF THIS BUSINESS

Private Equity Investing

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☒ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /22 / /22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /22 / /22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE

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

NATURE OF INVESTMENT

☐ Stock ☐ Other _____ (Describe)
☐ Partnership ☐ Income Received of \$0 - \$499
☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

 / /22 / /22
ACQUIRED DISPOSED

Comments: _____

Schedule A-1
Investments

Name
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	Market Value	Nature of Investment
ABBOTT LABORATORIES	Healthcare	\$0-\$10,000	Common Stock
ABBVIE INC.	Healthcare	\$0-\$10,000	Common Stock
ACCENTURE PLC	Information Technology	\$10,000-\$100,000	Common Stock
ADOBE SYSTEMS INC	Information Technology	\$0-\$10,000	Common Stock
ADVANCED MICRO DEVICES INC	Information Technology	\$0-\$10,000	Common Stock
AIR PRODUCTS & CHEMICALS INC	Materials	\$0-\$10,000	Common Stock
ALIGN TECHNOLOGY INC	Healthcare	\$0-\$10,000	Common Stock
ALTRIA GROUP INC	Consumer Staples	\$0-\$10,000	Common Stock
AMAZON.COM INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
AMERICAN EXPRESS COMPANY	Financials	\$10,000-\$100,000	Common Stock
AMGEN INC	Healthcare	\$10,000-\$100,000	Common Stock
AMPHENOL CORP NEW CL A	Information Technology	\$0-\$10,000	Common Stock
ANALOG DEVICES INC	Information Technology	\$0-\$10,000	Common Stock
ANTHEM INC.	Healthcare	\$0-\$10,000	Common Stock
APPLE INC	Information Technology	\$10,000-\$100,000	Common Stock
APPLIED MATERIALS INC	Information Technology	\$0-\$10,000	Common Stock
ARCHER DANIELS MIDLAND CO	Consumer Staples	\$0-\$10,000	Common Stock
ASTRAZENECA PLC SPONSORED ADR	Healthcare	\$0-\$10,000	Common Stock
BANK OF AMERICA CORPORATION	Financials	\$10,000-\$100,000	Common Stock
BEST BUY INC	Consumer Discretionary	\$0-\$10,000	Common Stock
BRISTOL-MYERS SQUIBB COMPANY	Healthcare	\$0-\$10,000	Common Stock
BROADCOM INC	Information Technology	\$10,000-\$100,000	Common Stock
CARMAX INC	Consumer Discretionary	\$0-\$10,000	Common Stock
CARRIER GLOBAL CORPORATION	Industrials	\$0-\$10,000	Common Stock
CELANESE CORP	Materials	\$0-\$10,000	Common Stock
CENTENE CORP DEL	Healthcare	\$0-\$10,000	Common Stock
CHURCH & DWIGHT INC	Consumer Staples	\$0-\$10,000	Common Stock
CIGNA CORPORATION	Healthcare	\$0-\$10,000	Common Stock
CISCO SYSTEMS INC.	Information Technology	\$0-\$10,000	Common Stock
CONAGRA INC	Consumer Staples	\$0-\$10,000	Common Stock
CONSTELLATION ENERGY	Utilities	\$0-\$10,000	Common Stock
CORTEVA INC	Materials	\$0-\$10,000	Common Stock
CROWN CASTLE INTL CORP NEW	Real Estate	\$0-\$10,000	Common Stock
CVS HEALTH CORPORATION	Healthcare	\$0-\$10,000	Common Stock
D R HORTON INC	Consumer Discretionary	\$0-\$10,000	Common Stock
DANAHER CORP	Healthcare	\$10,000-\$100,000	Common Stock
DOW INC.	Materials	\$0-\$10,000	Common Stock
EDWARDS LIFESCIENCES CORP	Healthcare	\$0-\$10,000	Common Stock
ESTEE LAUDER COMPANIES CLASS A	Consumer Staples	\$0-\$10,000	Common Stock
EXELON CORP	Utilities	\$0-\$10,000	Common Stock
EXPEDIA,INC.	Consumer Discretionary	\$0-\$10,000	Common Stock
FORD MOTOR COMPANY	Consumer Discretionary	\$0-\$10,000	Common Stock
FREEMONT MCMORAN COPPER & GOLD INC	Materials	\$0-\$10,000	Common Stock
GOLDMAN SACHS GROUP INC	Financials	\$0-\$10,000	Common Stock
H C A HOLDINGS INC	Healthcare	\$0-\$10,000	Common Stock
HOLOGIC INC	Healthcare	\$0-\$10,000	Common Stock

Schedule A-1
Investments

Name
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	Market Value	Nature of Investment
HOME DEPOT INC	Consumer Discretionary	\$10,000-\$100,000	Common Stock
HUMANA INC	Healthcare	\$0-\$10,000	Common Stock
INTUITIVE SURGICAL INC	Healthcare	\$0-\$10,000	Common Stock
INVESCO LIMITED	Financials	\$0-\$10,000	Common Stock
JOHNSON & JOHNSON	Healthcare	\$10,000-\$100,000	Common Stock
JP MORGAN CHASE & CO	Financials	\$10,000-\$100,000	Common Stock
K L A - TENCOR CORP	Information Technology	\$0-\$10,000	Common Stock
LAM RESH CORP	Information Technology	\$0-\$10,000	Common Stock
LILLY ELI & CO	Healthcare	\$0-\$10,000	Common Stock
LOCKHEED MARTIN CORP	Industrials	\$10,000-\$100,000	Common Stock
LOWE'S COMPANIES INC	Consumer Discretionary	\$0-\$10,000	Common Stock
MARKETAXESS HLDGS INC	Financials	\$0-\$10,000	Common Stock
MARTIN MARIETTA MATLS INC	Materials	\$0-\$10,000	Common Stock
META PLATFORMS INC	Telecommunications Services	\$0-\$10,000	Common Stock
METLIFE INC	Financials	\$0-\$10,000	Common Stock
MONSTER BEVERAGE CORPORATION	Consumer Staples	\$0-\$10,000	Common Stock
MORGAN STANLEY	Financials	\$0-\$10,000	Common Stock
MOTOROLA SOLUTIONS INC.	Information Technology	\$0-\$10,000	Common Stock
NEWMONT MINING CORP	Materials	\$0-\$10,000	Common Stock
NEXTERA ENERGY INC	Utilities	\$0-\$10,000	Common Stock
NIKE INC CLASS B STOCK	Consumer Discretionary	\$10,000-\$100,000	Common Stock
NORFOLK SOUTHERN CORPORATION	Industrials	\$10,000-\$100,000	Common Stock
NVIDIA CORP	Information Technology	\$10,000-\$100,000	Common Stock
PACCAR INC	Industrials	\$0-\$10,000	Common Stock
PARKER HANNIFIN CORP	Industrials	\$0-\$10,000	Common Stock
PENTAIR PLC	Industrials	\$0-\$10,000	Common Stock
PEPSICO INC	Consumer Staples	\$10,000-\$100,000	Common Stock
PFIZER INC	Healthcare	\$10,000-\$100,000	Common Stock
PROLOGIS, INC.	Real Estate	\$0-\$10,000	Common Stock
PUBLIC STORAGE INC REIT	Real Estate	\$10,000-\$100,000	Common Stock
Q O R V O INC.	Information Technology	\$0-\$10,000	Common Stock
QUALCOMM INC	Information Technology	\$0-\$10,000	Common Stock
QUANTA SVCS INC	Industrials	\$0-\$10,000	Common Stock
REGENERON PHARMACEUTICALS INC	Healthcare	\$0-\$10,000	Common Stock
ROCKWELL AUTOMATION INC	Industrials	\$0-\$10,000	Common Stock
ROPER INDUSTRIES INC	Information Technology	\$0-\$10,000	Common Stock
S & P GLOBAL INC.	Financials	\$10,000-\$100,000	Common Stock
S B A COMMUNICATIONS CORPORATION	Real Estate	\$0-\$10,000	Common Stock
SALESFORCE.COM INC	Information Technology	\$0-\$10,000	Common Stock
SHERWIN WILLIAMS CO	Materials	\$0-\$10,000	Common Stock
SKYWORKS SOLUTIONS INC	Information Technology	\$0-\$10,000	Common Stock
STARBUCKS CORP	Consumer Discretionary	\$10,000-\$100,000	Common Stock
T J X COMPANIES INC	Consumer Discretionary	\$0-\$10,000	Common Stock
TEXAS INSTRUMENTS INC	Information Technology	\$0-\$10,000	Common Stock
THE BOEING COMPANY	Industrials	\$0-\$10,000	Common Stock
THE KRAFT HEINZ COMPANY	Consumer Staples	\$0-\$10,000	Common Stock
THE PROCTER & GAMBLE COMPANY	Consumer Staples	\$10,000-\$100,000	Common Stock
TORCHMARK CORPORATION	Financials	\$10,000-\$100,000	Common Stock
TRANE TECHNOLOGIES PUBLIC LIMITED CO	Industrials	\$0-\$10,000	Common Stock
UNION PAC CORP	Industrials	\$10,000-\$100,000	Common Stock
UNITED PARCEL SERVICE CL B	Industrials	\$10,000-\$100,000	Common Stock
UNITEDHEALTH GROUP INC	Healthcare	\$10,000-\$100,000	Common Stock
VERTEX PHARMACEUTICALS INC	Healthcare	\$0-\$10,000	Common Stock
VIATRIS INC	Healthcare	\$0-\$10,000	Common Stock
VISA INC-CLASS A SHRS	Information Technology	\$10,000-\$100,000	Common Stock
WAL MART STORES INC	Consumer Staples	\$10,000-\$100,000	Common Stock
WEYERHAEUSER COMPANY	Real Estate	\$0-\$10,000	Common Stock

Schedule A-1
Investments

Name
Stephen Juelsgaard

Description	General Description of Business Activity	Market Value	Nature of Investment
ABBVIE INC.	Healthcare	\$10,000-\$100,000	Common Stock
ADVANCED MICRO DEVICES INC	Information Technology	\$0-\$10,000	Common Stock
ALPHABET, INC.	Telecommunications Services	\$0-\$10,000	Common Stock
AMERICAN INTERNATIONAL GROUP INC.	Financials	\$10,000-\$100,000	Common Stock
AMERICAN TOWER CORPORATION	Real Estate	\$0-\$10,000	Common Stock
AMPHENOL CORP NEW CL A	Information Technology	\$0-\$10,000	Common Stock
APPLE INC	Information Technology	\$0-\$10,000	Common Stock
ATLASSIAN CORP	Information Technology	\$0-\$10,000	Common Stock
BOSTON SCIENTIFIC CORPORATION	Healthcare	\$0-\$10,000	Common Stock
CME GROUP INC	Financials	\$0-\$10,000	Common Stock
COCA - COLA CO	Consumer Staples	\$10,000-\$100,000	Common Stock
COSTCO WHSL CORP NEW	Consumer Staples	\$0-\$10,000	Common Stock
DANAHER CORP	Healthcare	\$0-\$10,000	Common Stock
DEERE & CO	Industrials	\$0-\$10,000	Common Stock
EATON CORP PLC	Industrials	\$0-\$10,000	Common Stock
LAM RESH CORP	Information Technology	\$0-\$10,000	Common Stock
LAS VEGAS SANDS CORP	Consumer Discretionary	\$0-\$10,000	Common Stock
MARTIN MARIETTA MATLS INC	Materials	\$0-\$10,000	Common Stock
MASTERCARD INC	Information Technology	\$0-\$10,000	Common Stock
MC DONALD'S CORPORATION	Consumer Discretionary	\$0-\$10,000	Common Stock
MICROSOFT CORPORATION	Information Technology	\$10,000-\$100,000	Common Stock
NIKE INC CLASS B STOCK	Consumer Discretionary	\$0-\$10,000	Common Stock
NVIDIA CORP	Information Technology	\$0-\$10,000	Common Stock
ORACLE CORP	Information Technology	\$0-\$10,000	Common Stock
PIONEER NATURAL RESOURCES COMPANY	Energy	\$10,000-\$100,000	Common Stock
PUBLIC SVC ENTERPRISE GROUP INC	Utilities	\$0-\$10,000	Common Stock
RAYTHEON TECHNOLOGIES CORP	Industrials	\$0-\$10,000	Common Stock
SQUARE, INC.	Information Technology	\$0-\$10,000	Common Stock
T -MOBILE US, INC.	Telecommunications Services	\$10,000-\$100,000	Common Stock
TRUIST FINL CORP	Financials	\$0-\$10,000	Common Stock
UNITEDHEALTH GROUP INC	Healthcare	\$10,000-\$100,000	Common Stock

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Name of Business Entity	General Description of Business Activity	Market Value Range per Form 700 guidelines	Nature of Investment
3M CO Ticker MMM	Industrials	\$2,000-\$10,000	Common Stock
ABBOTT LABORATORIES Ticker ABT	Health Care	\$10,000-\$100,000	Common Stock
ABBVIE INC Ticker ABBV	Health Care	\$10,000-\$100,000	Common Stock
ACCENTURE PLC Ticker ACN	Information Technology	\$2,000-\$10,000	Common Stock
ADOBE INC Ticker ADOBE	Information Technology	\$10,000-\$100,000	Common Stock
AFLAC INC Ticker AFL	Financials	\$2,000-\$10,000	Common Stock
AIR PRODUCTS & CHEMICALS INC Ticker APD	Materials	\$2,000-\$10,000	Common Stock
ALLEGION PLC Ticker ALLE	Industrials	\$2,000-\$10,000	Common Stock
ALLSTATE CORP Ticker ALL	Financials	\$2,000-\$10,000	Common Stock
ALPHABET INC CLASS A Ticker GOOGL	Information Technology	\$10,000-\$100,000	Common Stock
ALPHABET INC CLASS C Ticker GOOG	Information Technology	\$10,000-\$100,000	Common Stock
AMAZON COM INC Ticker AMZN	Information Technology	\$10,000-\$100,000	Common Stock
AMERICAN ELECTRIC POWER CO INC Ticker AEP	Utilities	\$2,000-\$10,000	Common Stock
AMERICAN TOWER CORP Ticker AMT	Real Estate	\$10,000-\$100,000	Common Stock
AMERIPRISE FINANCIAL INC Ticker AMF	Financials	\$10,000-\$100,000	Common Stock
AMERISOURCEBERGEN CORP Ticker ABC	Health Care	\$2,000-\$10,000	Common Stock
AMERRA Agri Fund II, L.P. CUSIP 382991	Other	\$100,000-\$1,000,000	Partnership
AMGEN INC Ticker AMGN	Health Care	\$10,000-\$100,000	Common Stock
AMPHENOL CORP CLASS A Ticker APH	Industrials	\$2,000-\$10,000	Common Stock
ANALOG DEVICES INC Ticker ADI	Information Technology	\$2,000-\$10,000	Common Stock
AON PLC Ticker AON	Financials	\$10,000-\$100,000	Common Stock
APA CORP Ticker APA	Energy	\$2,000-\$10,000	Common Stock
APPLE INC Ticker AAPL	Information Technology	\$100,000-\$1,000,000	Common Stock
APPLIED MATERIALS INC Ticker AMAT	Information Technology	\$2,000-\$10,000	Common Stock

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Name of Business Entity	General Description of Business Activity	Market Value Range per Form 700 guidelines	Nature of Investment
APTIV PLC Ticker APTV	Consumer Discretionary	\$2,000-\$10,000	Common Stock
ARCHER-DANIELS-MIDLAND CO Ticker ADM	Consumer Staples	\$2,000-\$10,000	Common Stock
Asia Enterprise III Onshore LP CI B CUSIP 1000000000	Other	\$10,000-\$100,000	Partnership
AUTODESK INC Ticker ADSK	Information Technology	\$2,000-\$10,000	Common Stock
AUTOMATIC DATA PROCESSING INC Ticker ADP	Consumer Discretionary	\$10,000-\$100,000	Common Stock
AUTOZONE INC Ticker AZO	Consumer Discretionary	\$2,000-\$10,000	Common Stock
Avista Capital Opportunities Fund II (Onshore) Ticker AVCI	Other	\$100,000-\$1,000,000	Partnership
BAKER HUGHES CO Ticker BKR	Energy	\$2,000-\$10,000	Common Stock
BALL CORP Ticker BALL	Industrials	\$2,000-\$10,000	Common Stock
BANK OF AMERICA CORP Ticker BAC	Financials	\$10,000-\$100,000	Common Stock
BANK OF NEW YORK MELLON CORP Ticker BNY	Financials	\$2,000-\$10,000	Common Stock
BAXTER INTL INC Ticker BAX	Health Care	\$2,000-\$10,000	Common Stock
BECTON DICKINSON AND CO Ticker Bect	Health Care	\$10,000-\$100,000	Common Stock
BERKSHIRE HATHAWAY INC CL B Ticker BRK.B	Financials	\$10,000-\$100,000	Common Stock
BIOGEN INC Ticker BII	Health Care	\$2,000-\$10,000	Common Stock
BOEING CO Ticker BA	Industrials	\$10,000-\$100,000	Common Stock
BOOKING HOLDINGS INC Ticker BKNG	Information Technology	\$2,000-\$10,000	Common Stock
BOSTON SCIENTIFIC CORP Ticker BSX	Health Care	\$10,000-\$100,000	Common Stock
BROADCOM INC Ticker AVGO	Information Technology	\$2,000-\$10,000	Common Stock
CATALENT INC Ticker CTLT	Health Care	\$2,000-\$10,000	Common Stock
CATERPILLAR INC Ticker CAT	Industrials	\$10,000-\$100,000	Common Stock
CERIDIAN HCM HOLDING INC Ticker CCH	Information Technology	\$2,000-\$10,000	Common Stock
CHARTER COMMUNICATIONS INC Ticker CHTR	Consumer Discretionary	\$2,000-\$10,000	Common Stock
CHEVRON CORP Ticker CVX	Energy	\$2,000-\$10,000	Common Stock

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CHUBB LTD Ticker CB	Financials	\$2,000-\$10,000	Common Stock
CIGNA CORP Ticker CI	Health Care	\$10,000-\$100,000	Common Stock
CINTAS CORP Ticker CTAS	Consumer Discretionary	\$2,000-\$10,000	Common Stock
CISCO SYS INC Ticker CSCO	Information Technology	\$10,000-\$100,000	Common Stock
CLOROX CO/THE Ticker CLX	Consumer Staples	\$2,000-\$10,000	Common Stock
CME GROUP INC Ticker CME	Financials	\$2,000-\$10,000	Common Stock
CMMD Onshore Feeder Fd L.P. Crestline Energy	Other	\$100,000-\$1,000,000	Partnership
COCA-COLA CO Ticker KO	Consumer Staples	\$2,000-\$10,000	Common Stock
COGNIZANT TECH SOLUTIONS CL A Ticker CTSH	Information Technology	\$2,000-\$10,000	Common Stock
COMCAST CORP CL A Ticker CMCSA	Consumer Discretionary	\$10,000-\$100,000	Common Stock
COMERICA INC Ticker CMA	Financials	\$2,000-\$10,000	Common Stock
CONOCOPHILLIPS Ticker COP	Energy	\$2,000-\$10,000	Common Stock
CONSTELLATION BRANDS INC Ticker S	Consumer Staples	\$10,000-\$100,000	Common Stock
CORTEVA INC Ticker CTVA	Health Care	\$2,000-\$10,000	Common Stock
CROWN CASTLE INC REIT Ticker CCI	Real Estate	\$2,000-\$10,000	Common Stock
CUMMINS INC Ticker CMI	Industrials	\$2,000-\$10,000	Common Stock
CVS HEALTH CORP Ticker CVS	Health Care	\$2,000-\$10,000	Common Stock
DANAHER CORP Ticker DHR	Health Care	\$10,000-\$100,000	Common Stock
DEERE & CO Ticker DE	Industrials	\$2,000-\$10,000	Common Stock
DEVON ENERGY CORP NEW Ticker DVI	Energy	\$2,000-\$10,000	Common Stock
DGP IV Ownership Onshore Feeder Fund, Other	Other	\$100,000-\$1,000,000	Partnership
DIAMONDBACK ENERGY INC Ticker FAL	Energy	\$2,000-\$10,000	Common Stock
DOLLAR TREE INC Ticker DLTR	Consumer Discretionary	\$2,000-\$10,000	Common Stock
DOW INC Ticker DOW	Materials	\$2,000-\$10,000	Common Stock

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Name of Business Entity	General Description of Business Activity	Market Value Range per Form 700 guidelines	Nature of Investment
Dyal Capital Partners V Onshore LP C (in L	Other	\$2,000-\$10,000	Partnership
EASTMAN CHEMICAL CO Ticker EMN	Materials	\$2,000-\$10,000	Common Stock
EATON CORP PLC Ticker ETN	Industrials	\$2,000-\$10,000	Common Stock
ECOLAB INC Ticker ECL	Materials	\$2,000-\$10,000	Common Stock
ELEVANCE HEALTH INC Ticker ELV	Health Care	\$2,000-\$10,000	Common Stock
ELI LILLY & CO Ticker LLY	Health Care	\$2,000-\$10,000	Common Stock
EOG RESOURCES INC Ticker EOG	Energy	\$2,000-\$10,000	Common Stock
EQUIFAX INC Ticker EFX	Consumer Discretionary	\$2,000-\$10,000	Common Stock
ESTEE LAUDER COS INC CL A Ticker E	Consumer Staples	\$2,000-\$10,000	Common Stock
ETSY INC Ticker ETSY	Information Technology	\$2,000-\$10,000	Common Stock
EXELON CORP Ticker EXC	Utilities	\$2,000-\$10,000	Common Stock
EXPEDIA GROUP INC Ticker EXPE	Information Technology	\$2,000-\$10,000	Common Stock
EXXON MOBIL CORP Ticker XOM	Energy	\$2,000-\$10,000	Common Stock
FEDEX CORP Ticker FDX	Industrials	\$2,000-\$10,000	Common Stock
FIDELITY NATIONAL INFORMATION Tici	Information Technology	\$2,000-\$10,000	Common Stock
FIFTH THIRD BANCORP Ticker FITB	Financials	\$2,000-\$10,000	Common Stock
FIRST SOLAR INC Ticker FSLR	Energy	\$2,000-\$10,000	Common Stock
FISERV INC Ticker FISV	Information Technology	\$2,000-\$10,000	Common Stock
FMC CORP Ticker FMC	Materials	\$2,000-\$10,000	Common Stock
FORTIVE CORP Ticker FTV	Industrials	\$2,000-\$10,000	Common Stock
GARTNER INC NEW Ticker IT	Consumer Discretionary	\$2,000-\$10,000	Common Stock
GILEAD SCIENCES INC Ticker GILD	Health Care	\$2,000-\$10,000	Common Stock
GOLDMAN SACHS GROUP INC Ticker G	Financials	\$2,000-\$10,000	Common Stock
HALLIBURTON CO HOLDINGS CO Ticke	Energy	\$2,000-\$10,000	Common Stock

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Name of Business Entity	General Description of Business Activity	Market Value Range per Form 200 guidelines	Nature of Investment
HCA HEALTHCARE INC. Ticker HCA	Health Care	\$2,000-\$10,000	Common Stock
HEWLETT PACKARD ENTERPRISE CO	Information Technology	\$2,000-\$10,000	Common Stock
HH Pre-IPO Onshore Feeder Fund II, L.P.	Other	\$100,000-\$1,000,000	Partnership
HH Pre-IPO Onshore Feeder Fund IV, L.P.	Other	\$2,000-\$10,000	Partnership
HOME DEPOT INC. Ticker HD	Consumer Discretionary	\$10,000-\$100,000	Common Stock
HONEYWELL INTERNATIONAL INC. Ticker H	Industrials	\$10,000-\$100,000	Common Stock
HP INC. Ticker HPQ	Information Technology	\$2,000-\$10,000	Common Stock
ILLINOIS TOOL WORKS INC. Ticker ITW	Industrials	\$2,000-\$10,000	Common Stock
INGERSOLL RAND INC. Ticker IR	Industrials	\$2,000-\$10,000	Common Stock
INTEL CORP. Ticker INTC	Information Technology	\$2,000-\$10,000	Common Stock
INTUIT INC. Ticker INTU	Information Technology	\$10,000-\$100,000	Common Stock
IQVIA HOLDINGS INC. Ticker IQV	Health Care	\$2,000-\$10,000	Common Stock
JOHNSON & JOHNSON Ticker JNJ	Health Care	\$10,000-\$100,000	Common Stock
JPMORGAN CHASE & CO. Ticker JPM	Financials	\$10,000-\$100,000	Common Stock
KEYCORP. Ticker KEY	Financials	\$2,000-\$10,000	Common Stock
KIMBERLY CLARK CORP. Ticker KMB	Consumer Staples	\$2,000-\$10,000	Common Stock
KIMCO REALTY CORP. Ticker KIM	Real Estate	\$2,000-\$10,000	Common Stock
KROGER CO/THE Ticker KR	Consumer Staples	\$2,000-\$10,000	Common Stock
L3HARRIS TECHNOLOGIES INC. Ticker L	Industrials	\$2,000-\$10,000	Common Stock
LAM RESEARCH CORP. Ticker LRCX	Information Technology	\$2,000-\$10,000	Common Stock
LEIDOS HOLDINGS INC. Ticker LDOS	Information Technology	\$2,000-\$10,000	Common Stock
LENNAR CORP. Ticker LEN	Consumer Discretionary	\$2,000-\$10,000	Common Stock
LINDE PLC Ticker LIN	Materials	\$2,000-\$10,000	Common Stock
LOWE'S COS INC. Ticker LOW	Consumer Discretionary	\$10,000-\$100,000	Common Stock

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Name of Business Entity	General Description of Business Activity	Market Value Range per Form 100 guidelines	Nature of Investment
MARATHON OIL CORP Ticker MRO	Energy	\$2,000-\$10,000	Common Stock
MARATHON PETROLEUM CORP Ticker	Energy	\$2,000-\$10,000	Common Stock
MARRIOTT INTERNATIONAL INC/MD Ticker	Consumer Discretionary	\$2,000-\$10,000	Common Stock
MARSH & MCLENNAN COS INC Ticker	Financials	\$2,000-\$10,000	Common Stock
MASTERCARD INCORPORATED Ticker	Financials	\$2,000-\$10,000	Common Stock
MCDONALD'S CORP Ticker MCD	Consumer Discretionary	\$2,000-\$10,000	Common Stock
MCKESSON CORP Ticker MCK	Health Care	\$2,000-\$10,000	Common Stock
META PLATFORMS INC-CLASS A Ticker	Information Technology	\$2,000-\$10,000	Common Stock
MICROCHIP TECHNOLOGY INC Ticker	Information Technology	\$2,000-\$10,000	Common Stock
MICROSOFT CORP Ticker MSFT	Information Technology	\$2,000-\$10,000	Common Stock
MONDELEZ INTERNATIONAL INC Ticker	Consumer Staples	\$2,000-\$10,000	Common Stock
MONSTER BEVERAGE CORP Ticker MN	Consumer Staples	\$2,000-\$10,000	Common Stock
MOODY'S CORP Ticker MCO	Consumer Discretionary	\$2,000-\$10,000	Common Stock
MORGAN STANLEY Ticker MS	Financials	\$2,000-\$10,000	Common Stock
MOTOROLA SOLUTIONS INC Ticker MS	Information Technology	\$2,000-\$10,000	Common Stock
NETFLIX INC Ticker NFLX	Information Technology	\$2,000-\$10,000	Common Stock
NEXTERA ENERGY INC Ticker NEE	Utilities	\$2,000-\$10,000	Common Stock
NGT II Onshore Feeder Fund, L.P., Series I	Other	\$2,000-\$10,000	Partnership
NIKE INC CL B Ticker NKE	Consumer Discretionary	\$2,000-\$10,000	Common Stock
NISOURCE INC Ticker NI	Utilities	\$2,000-\$10,000	Common Stock
NORFOLK SOUTHERN CORP Ticker NS	Industrials	\$2,000-\$10,000	Common Stock
NORTHROP GRUMMAN CORP Ticker N	Industrials	\$2,000-\$10,000	Common Stock
NRG ENERGY INC Ticker NRG	Utilities	\$2,000-\$10,000	Common Stock
NUCOR CORP Ticker NUE	Materials	\$2,000-\$10,000	Common Stock

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Name of Business Entity	General Description of Business Activity	Market Value Range per Form 700 guidelines	Nature of Investment
NVIDIA CORP Ticker NVDA	Information Technology	\$10,000-\$100,000	Common Stock
OCCIDENTAL PETROLEUM CORP Ticker OXY	Energy	\$2,000-\$10,000	Common Stock
PAYCHEX INC Ticker PAYX	Information Technology	\$2,000-\$10,000	Common Stock
PAYPAL HOLDINGS INC Ticker PYPL	Consumer Discretionary	\$2,000-\$10,000	Common Stock
PEPSICO INC Ticker PEP	Consumer Staples	\$10,000-\$100,000	Common Stock
PFIZER INC Ticker PFE	Health Care	\$10,000-\$100,000	Common Stock
PHILLIPS 66 Ticker PSX	Energy	\$2,000-\$10,000	Common Stock
PIONEER NATURAL RESOURCES CO Ticker PNR	Energy	\$2,000-\$10,000	Common Stock
PPG INDUSTRIES INC Ticker PPG	Materials	\$2,000-\$10,000	Common Stock
Private Equity Opportunities (PPV) Onshore	Other	\$100,000-\$1,000,000	Partnership
PRO LOGIS INC Ticker PLD	Real Estate	\$10,000-\$100,000	Common Stock
PROCTER & GAMBLE CO/THE Ticker PG	Consumer Staples	\$10,000-\$100,000	Common Stock
PRUDENTIAL FINANCIAL INC Ticker PRF	Financials	\$2,000-\$10,000	Common Stock
PUBLIC SERVICE ENTERPRISE GRP Ticker PSE	Utilities	\$2,000-\$10,000	Common Stock
QUALCOMM INC Ticker QCOM	Information Technology	\$2,000-\$10,000	Common Stock
QUEST DIAGNOSTICS INC Ticker DGX	Health Care	\$2,000-\$10,000	Common Stock
REGENCY CENTERS CORP Ticker REG	Real Estate	\$2,000-\$10,000	Common Stock
REGIONS FINANCIAL CORP Ticker RF	Financials	\$2,000-\$10,000	Common Stock
S&P GLOBAL INC Ticker SPGI	Consumer Discretionary	\$10,000-\$100,000	Common Stock
SALESFORCE INC Ticker CRM	Information Technology	\$10,000-\$100,000	Common Stock
SCHLUMBERGER LTD Ticker SLB	Energy	\$2,000-\$10,000	Common Stock
SCHWAB CHARLES CORP Ticker SCHW	Financials	\$10,000-\$100,000	Common Stock
SEMPRA ENERGY Ticker SRE	Utilities	\$2,000-\$10,000	Common Stock
SERVICENOW INC Ticker NOW	Information Technology	\$2,000-\$10,000	Common Stock

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Name of Business Entity	General Description of Business Activity	Market Value Range per Form 700 guidelines	Nature of Investment
SOLAREDGE TECHNOLOGIES INC Ticker SOL	Energy	\$2,000-\$10,000	Common Stock
SOUTHWEST AIRLINES CO Ticker LUV	Industrials	\$2,000-\$10,000	Common Stock
STARBUCKS CORP Ticker SBUX	Consumer Discretionary	\$10,000-\$100,000	Common Stock
STRYKER CORP Ticker SYK	Health Care	\$2,000-\$10,000	Common Stock
SVB FINANCIAL GROUP INC Ticker SIVF	Financials	\$2,000-\$10,000	Common Stock
T MOBILE US INC Ticker TMUS	Communication	\$10,000-\$100,000	Common Stock
TARGET CORP Ticker TGT	Consumer Discretionary	\$2,000-\$10,000	Common Stock
TESLA Ticker TSLA	Consumer Discretionary	\$2,000-\$10,000	Common Stock
TEXAS INSTRUMENTS INC Ticker TXN	Information Technology	\$10,000-\$100,000	Common Stock
TF Capital Investors II LP CI A CUSIP 99A1	Other	\$2,000-\$10,000	Partnership
THE MOSAIC COMPANY Ticker MOS	Materials	\$2,000-\$10,000	Common Stock
THERMO FISHER SCIENTIFIC INC Ticker TMO	Health Care	\$2,000-\$10,000	Common Stock
TJX COMPANIES INC NEW Ticker TJX	Consumer Discretionary	\$10,000-\$100,000	Common Stock
TRANE TECHNOLOGIES PLC Ticker TT	Industrials	\$2,000-\$10,000	Common Stock
TRG Growth Partnership (Cayman Onshore)	Other	\$100,000-\$1,000,000	Partnership
TRUIST FINANCIAL CORP Ticker TFC	Financials	\$2,000-\$10,000	Common Stock
TYSON FOODS INC Ticker TSN	Consumer Staples	\$2,000-\$10,000	Common Stock
UNION PACIFIC CORP Ticker UNP	Industrials	\$10,000-\$100,000	Common Stock
UNITEDHEALTH GROUP INC Ticker UNH	Health Care	\$10,000-\$100,000	Common Stock
VALERO ENERGY CORP-NEW Ticker VET	Energy	\$2,000-\$10,000	Common Stock
VENTAS INC Ticker VTR	Real Estate	\$2,000-\$10,000	Common Stock
VERIZON COMMUNICATIONS Ticker VZ	Communication	\$2,000-\$10,000	Common Stock
VERTEX PHARMACEUTICALS INC Ticker VRTX	Health Care	\$2,000-\$10,000	Common Stock
VISA INC COM CL A Ticker V	Financials	\$10,000-\$100,000	Common Stock

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Name of Business Entity	General Description of Business Activity	Market Value Range per Form 200 guidelines	Nature of Investment
WALMART INC Ticker WMT	Consumer Discretionary	\$2,000-\$10,000	Common Stock
WALT DISNEY CO Ticker DIS	Consumer Discretionary	\$10,000-\$100,000	Common Stock
WATERS CORP Ticker WAT	Health Care	\$2,000-\$10,000	Common Stock
WELLS FARGO & CO NEW Ticker WFC	Financials	\$2,000-\$10,000	Common Stock
WELLTOWER INC Ticker WELL	Real Estate	\$2,000-\$10,000	Common Stock
WEYERHAEUSER CO Ticker WY	Real Estate	\$2,000-\$10,000	Common Stock
WHIRLPOOL CORP Ticker WHR	Consumer Discretionary	\$2,000-\$10,000	Common Stock
ZIONS BANCORP NA Ticker ZION	Financials	\$2,000-\$10,000	Common Stock
ZOETIS INC Ticker ZTS	Health Care	\$2,000-\$10,000	Common Stock

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Security Description	General Description of Business Activity	Gain/Loss	Nature of Business Investment
ABBVIE INC.	Healthcare	-\$10,000-\$0	Common Stock
ADVANCED MICRO DEVICES INC	Information Technology	\$0-\$10,000	Common Stock
AIR PRODS & CHEMS INC	Materials	\$0-\$10,000	Common Stock
ALPHABET INC/CA-CL A	Telecommunications Services	\$0-\$10,000	Common Stock
AMERICAN TOWER CORP	Real Estate	-\$10,000-\$0	Common Stock
APPLE INC	Information Technology	\$0-\$10,000	Common Stock
ATLASSIAN CORP PLC-CLASS A	Information Technology	-\$10,000-\$0	Common Stock
BLOCK, INC.	Financials	-\$10,000-\$0	Common Stock
BOSTON SCIENTIFIC CORP	Healthcare	\$0-\$10,000	Common Stock
CHEVRON CORPORATION	Energy	\$0-\$10,000	Common Stock
COMCAST CORP CL A	Telecommunications Services	\$0-\$10,000	Common Stock
COSTCO WHSL CORP NEW	Consumer Staples	-\$10,000-\$0	Common Stock
DEERE & CO	Industrials	\$0-\$10,000	Common Stock
DUPONT DE NEMOURS INC	Industrials	-\$10,000-\$0	Common Stock
ELECTRONIC ARTS INC	Telecommunications Services	\$0-\$10,000	Common Stock
GENERAL MOTORS CO	Consumer Discretionary	-\$10,000-\$0	Common Stock
HONEYWELL INTL INC	Industrials	\$0-\$10,000	Common Stock
LAM RESH CORP	Information Technology	\$0-\$10,000	Common Stock
MICROSOFT CORPORATION	Information Technology	\$0-\$10,000	Common Stock
NEXTERA ENERGY INC	Utilities	\$0-\$10,000	Common Stock
NIKE INC CLASS B	Consumer Discretionary	-\$10,000-\$0	Common Stock
NVIDIA CORP	Information Technology	-\$10,000-\$0	Common Stock
PAYPAL HOLDINGS INC	Information Technology	-\$10,000-\$0	Common Stock
PIONEER NATURAL RESOURCES CO	Energy	-\$10,000-\$0	Common Stock
PROCTER & GAMBLE CO	Consumer Staples	\$0-\$10,000	Common Stock
ROYAL CARIBBEAN CRUISES LTD	Consumer Discretionary	-\$10,000-\$0	Common Stock

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Security Description	General Description of Business Activity	Gain/Loss	Nature of Investment
ADVANCED MICRO DEVICES INC	Information Technology	\$0-\$10,000	Common Stock
CLOROX CO	Consumer Staples	-\$10,000-\$0	Common Stock
CONSTELLATION ENERGY	Utilities	\$0-\$10,000	Common Stock
DOVER CORP	Industrials	\$0-\$10,000	Common Stock
EATON CORP PLC	Industrials	\$0-\$10,000	Common Stock
EMERSON ELECTRIC CO	Industrials	\$0-\$10,000	Common Stock
FORTIVE CORP.	Industrials	-\$10,000-\$0	Common Stock
GARMIN LTD	Consumer Discretionary	-\$10,000-\$0	Common Stock
GRAINGER W W INC	Industrials	\$0-\$10,000	Common Stock
HONEYWELL INTL INC	Industrials	\$0-\$10,000	Common Stock
IDEX CORP	Industrials	\$0-\$10,000	Common Stock
ILLUMINA INC	Healthcare	-\$10,000-\$0	Common Stock
INCYTE CORPORATION	Healthcare	-\$10,000-\$0	Common Stock
MEDTRONIC PLC ADR	Healthcare	-\$10,000-\$0	Common Stock
PAYPAL HOLDINGS INC	Information Technology	-\$10,000-\$0	Common Stock
ZIMMER BIOMET HOLDINGS, INC	Healthcare	-\$10,000-\$0	Common Stock
ZIMVIE INC	Healthcare	-\$10,000-\$0	Common Stock

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Name of Business Entity	General Description of Business Activity	Sale Value Range per Form 700 guidelines	Nature of Investment
ACCENTURE PLC IRELAND CLASS SHS	Information Technology	\$2,000-\$10,000	Common Stock
ADOBE SYS INC COM	Information Technology	\$2,000-\$10,000	Common Stock
ADVANCED MICRO DEVICES INC COM	Information Technology	\$2,000-\$10,000	Common Stock
APTIV PLC SHS COM	Consumer Discretionary	\$2,000-\$10,000	Common Stock
AT&T INC COM	Communication	\$2,000-\$10,000	Common Stock
CHEVRON CORP NEW COM	Energy	\$2,000-\$10,000	Common Stock
DOLLAR TREE INC COM	Consumer Discretionary	\$2,000-\$10,000	Common Stock
FIRST REP BK SAN FRANCISCO CALIF	Financials	\$2,000-\$10,000	Common Stock
FORTINET INC COM	Information Technology	\$2,000-\$10,000	Common Stock
INTERNATIONAL FLAVORS & FRAGRAN	Materials	\$2,000-\$10,000	Common Stock
LUMEN TECHNOLOGIES INC LA COM	Communication	\$2,000-\$10,000	Common Stock
MATCH GROUP INC NEW COM	Information Technology	\$2,000-\$10,000	Common Stock
MERCK & CO INC NEW COM	Health Care	\$2,000-\$10,000	Common Stock
META PLATFORMS INC CL A	Information Technology	\$2,000-\$10,000	Common Stock
MODERNA INC COM	Health Care	\$2,000-\$10,000	Common Stock
MONOLITHIC PWR SYS INC COM	Information Technology	\$2,000-\$10,000	Common Stock
PAYCOM SOFTWARE INC COM	Information Technology	\$2,000-\$10,000	Common Stock
PAYPAL HLDGS INC COM	Consumer Discretionary	\$2,000-\$10,000	Common Stock
QUALCOMM INC COM	Information Technology	\$2,000-\$10,000	Common Stock
REGENERON PHARMACEUTICALS INC	Health Care	\$2,000-\$10,000	Common Stock
SALESFORCE INC COM	Information Technology	\$2,000-\$10,000	Common Stock
SOUTHERN CO COM	Utilities	\$2,000-\$10,000	Common Stock
SVB FINL GROUP COM	Financials	\$2,000-\$10,000	Common Stock
T ROWE GROUP INC COM	Financials	\$2,000-\$10,000	Common Stock

Schedule A-1
Investments Sold

Name
Stephen Juelsgaard

Name of Business Entity	General Description of Business Activity	Market Value Range per Form 729 guidelines	Nature of Investment
TESLA INC COM	Consumer Discretionary	\$10,000-\$100,000	Common Stock
THERMO FISHER SCIENTIFIC INC COM	Health Care	\$2,000-\$10,000	Common Stock
V F CORP COM	Consumer Discretionary	\$2,000-\$10,000	Common Stock
VALERO ENERGY CORP NEW COM	Energy	\$2,000-\$10,000	Common Stock
VERIZON COMMUNICATIONS INC	Communication	\$2,000-\$10,000	Common Stock
WELLS FARGO & CO NEW COM	Financials	\$2,000-\$10,000	Common Stock

SCHEDULE B
Interests in Real Property
(Including Rental Income)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name
Stephen Juelsgaard

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

2025 Apollo Ct.

CITY

Napa

FAIR MARKET VALUE

☐ \$2,000 - \$10,000

☐ \$10,001 - \$100,000

☒ \$100,001 - \$1,000,000

☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 / / **22**

ACQUIRED

 / / **22**

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

Corbin Smith

Mitch Davis

Sam Cody

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

860 Omaha Ct.

CITY

Napa

FAIR MARKET VALUE

☐ \$2,000 - \$10,000

☐ \$10,001 - \$100,000

☒ \$100,001 - \$1,000,000

☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

 / / **22**

ACQUIRED

 / / **22**

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

Tim Sartoris

Rafael Molina

* 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: _____

SCHEDULE B
Interests in Real Property
(Including Rental Income)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name
Stephen Juelsgaard

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

845 Omaha Ct.

CITY

Napa

FAIR MARKET VALUE

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

IF APPLICABLE, LIST DATE:

 / / 22 / / 22
ACQUIRED DISPOSED

NATURE OF INTEREST

☒ Ownership/Deed of Trust ☐ Easement

☐ Leasehold ☐ Other
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

Chad and Barbara Vaughn

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

15396 N. Hwy. 88

CITY

Lodi

FAIR MARKET VALUE

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

IF APPLICABLE, LIST DATE:

 / / 22 / / 22
ACQUIRED DISPOSED

NATURE OF INTEREST

☒ Ownership/Deed of Trust ☐ Easement

☐ Leasehold ☐ Other
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:

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

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

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME
SFC Riverview Ranch LP

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

BUSINESS ACTIVITY, IF ANY, OF SOURCE
Apartment Ownership

YOUR BUSINESS POSITION
LP

GROSS INCOME RECEIVED ☐ No Income - Business Position Only

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

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

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

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

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

☐ Sale of _____
(Real property, car, boat, etc.)

☐ Loan repayment

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

(Describe)

☐ Other _____
(Describe)

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME
SFC Park Knolls Investors

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

BUSINESS ACTIVITY, IF ANY, OF SOURCE
Apartment Ownership

YOUR BUSINESS POSITION
LP

GROSS INCOME RECEIVED ☐ No Income - Business Position Only

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

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

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

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

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

☐ Sale of _____
(Real property, car, boat, etc.)

☐ Loan repayment

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

(Describe)

☐ Other _____
(Describe)

► 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

INTEREST RATE

_____% ☐ None

TERM (Months/Years)

SECURITY FOR LOAN

☐ None ☐ Personal residence

☐ Real Property _____
Street address

City

☐ Guarantor _____

☐ Other _____
(Describe)

Comments: _____

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

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

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME
SFC Eastlake Partners LP

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

BUSINESS ACTIVITY, IF ANY, OF SOURCE
Apartment Ownership

YOUR BUSINESS POSITION
LP

GROSS INCOME RECEIVED ☐ No Income - Business Position Only

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

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

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

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

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

☐ Sale of _____
(Real property, car, boat, etc.)

☐ Loan repayment

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

(Describe)

☐ Other _____
(Describe)

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME
SFC Stonegate Village Investors LP

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

BUSINESS ACTIVITY, IF ANY, OF SOURCE
Apartment Ownership

YOUR BUSINESS POSITION
LP

GROSS INCOME RECEIVED ☐ No Income - Business Position Only

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

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

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

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

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

☐ Sale of _____
(Real property, car, boat, etc.)

☐ Loan repayment

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

(Describe)

☐ Other _____
(Describe)

► 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

INTEREST RATE

_____% ☐ None

TERM (Months/Years)

SECURITY FOR LOAN

☐ None ☐ Personal residence

☐ Real Property _____
Street address

City

☐ Guarantor _____

☐ Other _____
(Describe)

Comments: _____

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

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

1. INCOME RECEIVED	1. INCOME RECEIVED
NAME OF SOURCE OF INCOME <u>Blackstone GSO Capital Solutions Fund LP</u>	NAME OF SOURCE OF INCOME <u>GSO Capital solutions Fund II LP</u>
ADDRESS (Business Address Acceptable) <u>560 Mission St., Ste. 2400, San Francisco, CA 94104</u>	ADDRESS (Business Address Acceptable) <u>560 Mission St., Ste. 2400, San Francisco, CA 94104</u>
BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Business lending</u>	BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Business Lending</u>
YOUR BUSINESS POSITION <u>LP</u>	YOUR BUSINESS POSITION <u>LP</u>
GROSS INCOME RECEIVED <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$100,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	GROSS INCOME RECEIVED <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$100,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input checked="" type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)	CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.) <input checked="" type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.) <input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.) <input type="checkbox"/> Loan repayment <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe) <input type="checkbox"/> Other _____ (Describe)

2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

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

Comments: _____

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

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

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

Starwood Opportunity Fund VIII LP

ADDRESS (Business Address Acceptable)

560 Mission St., Ste. 2400, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE

Real Estate Investing

YOUR BUSINESS POSITION

LP

GROSS INCOME RECEIVED

☐ \$500 - \$1,000

☒ \$10,001 - \$100,000

☐ No Income - Business Position Only

☐ \$1,001 - \$10,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary

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

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

☐ Sale of _____

(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or

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

(Describe)

☐ Other _____

(Describe)

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

Starwood Opportunities Fund IX LP

ADDRESS (Business Address Acceptable)

560 Mission St., Ste. 2400, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE

Real Estate Investing

YOUR BUSINESS POSITION

LP

GROSS INCOME RECEIVED

☐ \$500 - \$1,000

☒ \$10,001 - \$100,000

☐ No Income - Business Position Only

☐ \$1,001 - \$10,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary

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

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

☐ Sale of _____

(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or

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

(Describe)

☐ Other _____

(Describe)

► 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

INTEREST RATE

_____%

☐ None

TERM (Months/Years)

SECURITY FOR LOAN

☐ None

☐ Personal residence

☐ Real Property

Street address

City

☐ Guarantor

☐ Other

(Describe)

Comments:

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

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name
Stephen Juelsgaard

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

HPS Core Senior Lending Fund LP

ADDRESS (Business Address Acceptable)

560 Mission St., Ste. 2400, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE

Business Lending

YOUR BUSINESS POSITION

LP

GROSS INCOME RECEIVED

☐ No Income - Business Position Only

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☒ \$10,001 - \$100,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary

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

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

☐ Sale of _____

(Real property, car, boat, etc.)

☐ Loan repayment

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

(Describe)

☐ Other _____

(Describe)

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

Apollo EPF III Private Investors LLC

ADDRESS (Business Address Acceptable)

560 Mission St., Ste. 2400, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE

Business Lending

YOUR BUSINESS POSITION

LP

GROSS INCOME RECEIVED

☐ No Income - Business Position Only

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☒ \$10,001 - \$100,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary

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

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

☐ Sale of _____

(Real property, car, boat, etc.)

☐ Loan repayment

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

(Describe)

☐ Other _____

(Describe)

► 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

INTEREST RATE

_____% ☐ None

TERM (Months/Years)

SECURITY FOR LOAN

☐ None

☐ Personal residence

☐ Real Property _____

Street address

City

☐ Guarantor _____

☐ Other _____

(Describe)

Comments: _____

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

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

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME <u>FT Ventures III LP</u>	
ADDRESS (Business Address Acceptable) <u>555 California St., Ste. 2900, San Francisco, CA</u>	
BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Financial Services Investing</u>	
YOUR BUSINESS POSITION <u>LP</u>	
GROSS INCOME RECEIVED	<input type="checkbox"/> No Income - Business Position Only
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> \$1,001 - \$10,000
<input checked="" type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED	
<input type="checkbox"/> Salary	<input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)
<input checked="" type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)	
<input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.)	
<input type="checkbox"/> Loan repayment	
<input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe)	
<input type="checkbox"/> Other _____ (Describe)	

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME <u>FT Ventures IV LP</u>	
ADDRESS (Business Address Acceptable) <u>555 California St., Ste. 2900, San Francisco, CA</u>	
BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Financial Services Investing</u>	
YOUR BUSINESS POSITION <u>LP</u>	
GROSS INCOME RECEIVED	<input type="checkbox"/> No Income - Business Position Only
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> \$1,001 - \$10,000
<input type="checkbox"/> \$10,001 - \$100,000	<input checked="" type="checkbox"/> OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED	
<input type="checkbox"/> Salary	<input type="checkbox"/> Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)
<input checked="" type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)	
<input type="checkbox"/> Sale of _____ (Real property, car, boat, etc.)	
<input type="checkbox"/> Loan repayment	
<input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ (Describe)	
<input type="checkbox"/> Other _____ (Describe)	

► 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER*
ADDRESS (Business Address Acceptable)
BUSINESS ACTIVITY, IF ANY, OF LENDER
HIGHEST BALANCE DURING REPORTING PERIOD
<input type="checkbox"/> \$500 - \$1,000
<input type="checkbox"/> \$1,001 - \$10,000
<input type="checkbox"/> \$10,001 - \$100,000
<input type="checkbox"/> OVER \$100,000

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

Comments: _____

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

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name
Stephen Juelsgaard

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

TRG Growth Partnership LP

ADDRESS (Business Address Acceptable)

One Sansome St., 23rd Floor, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE

Private Equity Investing

YOUR BUSINESS POSITION

LP

GROSS INCOME RECEIVED

☐ \$500 - \$1,000

☒ \$10,001 - \$100,000

☐ No Income - Business Position Only

☐ \$1,001 - \$10,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary

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

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

☐ Sale of _____

(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or

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

(Describe)

☐ Other _____

(Describe)

► 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

DGP Onshore Feeder Fund IV LP

ADDRESS (Business Address Acceptable)

One Sansome St., 23rd Floor, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE

Private Equity Investing

YOUR BUSINESS POSITION

LP

GROSS INCOME RECEIVED

☐ \$500 - \$1,000

☐ \$10,001 - \$100,000

☐ No Income - Business Position Only

☐ \$1,001 - \$10,000

☒ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary

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

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

☐ Sale of _____

(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or

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

(Describe)

☐ Other _____

(Describe)

► 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

INTEREST RATE

_____%

☐ None

TERM (Months/Years)

SECURITY FOR LOAN

☐ None

☐ Personal residence

☐ Real Property _____

Street address

City

☐ Guarantor _____

☐ Other _____

(Describe)

Comments: _____

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

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Stephen Juelsgaard

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

NGT Onshore Feeder Fund LP

ADDRESS (Business Address Acceptable)

One Sansome St., 23rd Floor, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE

Private Equity Investing

YOUR BUSINESS POSITION

LP

GROSS INCOME RECEIVED

☐ \$500 - \$1,000

☒ \$10,001 - \$100,000

☐ No Income - Business Position Only

☐ \$1,001 - \$10,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary

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

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

☐ Sale of

(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or

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

(Describe)

☐ Other

(Describe)

▶ 1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

Hadley Harbor Pre-IPO Onshore Feeder Fund LP

ADDRESS (Business Address Acceptable)

One Sansome St., 23rd Floor, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE

Pre-IPO Company Investing

YOUR BUSINESS POSITION

LP

GROSS INCOME RECEIVED

☐ \$500 - \$1,000

☒ \$10,001 - \$100,000

☐ No Income - Business Position Only

☐ \$1,001 - \$10,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary

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

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

☐ Sale of

(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or

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

(Describe)

☐ Other

(Describe)

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

INTEREST RATE

_____%

☐ None

TERM (Months/Years)

SECURITY FOR LOAN

☐ None

☐ Personal residence

☐ Real Property

Street address

City

☐ Guarantor

☐ Other

(Describe)

Comments:

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

CALIFORNIA FORM 700

FAIR POLITICAL PRACTICES COMMISSION

Name

Stephen Juelsgaard

1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

CMMO Crestline Onshore Feeder Fund LP

ADDRESS (Business Address Acceptable)

One Sansome St., 23rd Floor, San Francisco, CA 94104

BUSINESS ACTIVITY, IF ANY, OF SOURCE

Credit and Private Equity Investing

YOUR BUSINESS POSITION

LP

GROSS INCOME RECEIVED

☐ \$500 - \$1,000

☐ \$1,001 - \$100,000

☐ \$10,001 - \$100,000

☐ No Income - Business Position Only

☒ \$1,001 - \$10,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary

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

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

☐ Sale of

(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or

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

(Describe)

☐ Other

(Describe)

1. INCOME RECEIVED

NAME OF SOURCE OF INCOME

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

YOUR BUSINESS POSITION

GROSS INCOME RECEIVED

☐ \$500 - \$1,000

☐ \$1,001 - \$100,000

☐ \$10,001 - \$100,000

☐ No Income - Business Position Only

☐ \$1,001 - \$10,000

☐ OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED

☐ Salary

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

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

☐ Sale of

(Real property, car, boat, etc.)

☐ Loan repayment

☐ Commission or

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

(Describe)

☐ Other

(Describe)

2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

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

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

INTEREST RATE

_____%

☐ None

TERM (Months/Years)

SECURITY FOR LOAN

☐ None

☐ Personal residence

☐ Real Property

Street address

City

☐ Guarantor

☐ Other

(Describe)

Comments: