

United States Senate
Financial Disclosures

Annual Report for Calendar 2023

The Honorable Shelley M Capito (Capito, Shelley Moore)

 Filed 05/09/2024 @ 1:43 PM

The following statements were checked before filing:

- ☒ I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- ☒ I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.

☐ I *omitted* assets because they meet the three-part test for exemption.

Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **No**

Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Spouse	Retirement	Wells Fargo Advisors Charleston, WV	> \$1,000	n/a
2	Spouse	Pension	Citigroup New York, NY	> \$1,000	n/a
3	Spouse	Board Compensation	United Bankshares, Inc. Charleston, WV	> \$1,000	n/a
4	Self	Other (IRA distribution)	Shelley M Capito Bene IRA Charleston, WV	\$7,638.95	n/a
5	Spouse	Retirement	Wells Fargo 401(k) Denver, CO	> \$1,000	n/a
6	Spouse	Other (IRA Distribution)	Belle Meade Associates New York, NY	> \$1,000	n/a

Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

	Asset	Asset Type	Owner	Value	Income Type	Income
1	<u>HBAN</u> - Huntington Bancshares Incorporated (NASDAQ)	Corporate Securities Stock	Joint	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
2	<u>AUB</u> - Atlantic Union Bankshares Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	\$201 - \$1,000
3	<u>CSCO</u> - Cisco Systems, Inc. (NASDAQ)	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
4	<u>C</u>-Citigroup Inc. (NYSE)	Corporate Securities Stock	Self	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
5	<u>DJS</u> - The Walt Disney Company (NYSE)	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
6	<u>DUK</u> - Duke Energy Corporation (NYSE)	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	\$201 - \$1,000
7	<u>ENB</u> - Enbridge Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	\$201 - \$1,000
8	<u>TRV</u> - The Travelers Companies, Inc. (NYSE)	Corporate Securities Stock	Self	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
9	<u>TFC</u> - Truist Financial Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends, Capital Gains,	\$1,001 - \$2,500
10	<u>VZ</u> - Verizon Communications Inc. (NYSE)	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	\$201 - \$1,000
11	<u>AMGN</u> - Amgen Inc. - Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
12	<u>ADI</u> - Analog Devices	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
13	<u>BAC</u> - Bank of America Corporation Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
14	<u>KO</u> - Coca-Cola Company	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
15	<u>CMCSA</u> - Comcast Corporation - Class A Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
16	<u>CVS</u> - CVS Health Corporation Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
17	<u>FERG</u> - Ferguson Plc	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
18	<u>GILD</u> - Gilead Sciences, Inc. - Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
19	<u>LMT</u> - Lockheed Martin Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
20	<u>LOW</u> - Lowe's Companies, Inc. Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
21	LVMH MOET HENNESSY LOUIS VUITTON	American Depository Receipt	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
22	<u>MRK</u> - Merck & Co., Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
23	<u>MSFT</u> - Microsoft Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
24	<u>MDLZ</u> - Mondelez International, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
25	<u>NVS</u> - Novartis AG	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
26	<u>QCOM</u> - QUALCOMM Incorporated - Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
27	<u>QSR</u> - Restaurant Brands International Inc	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
28	<u>RHHBY</u> - Roche Holding AG	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
29	<u>RPM</u> - RPM International Inc. Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
30	<u>SNA</u> - Snap-On Incorporated Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
31	<u>WMB</u> - Williams Companies, Inc. (The) Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
32	Wells Fargo (Charleston, WV) <i>Type: Brokerage Sweep Account,</i>	Bank Deposit	Self	\$50,001 - \$100,000	Interest,	None (or less than \$201)
33	WV Public Employees Retirement System	Retirement Plans Defined Benefit Pension Plan	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
34	IRA	Retirement Plans IRA	Self			
34.1	SINAX-ClearBridge Large Cap Value A (NASDAQ)	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Dividends,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
34.2	<u>AUB</u> - Atlantic Union Bankshares Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35	IRA 2	Retirement Plans IRA	Self			
35.1	<u>GIS</u> - General Mills, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.2	<u>GD</u> - General Dynamics Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.3	<u>GWV</u> - W.W. Grainger, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.4	<u>LHX</u> - L3Harris Technologies, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.5	<u>ITW</u> - Illinois Tool Works Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.6	<u>SJM</u> - The J. M. Smucker Company	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.7	<u>JNJ</u> - Johnson & Johnson	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.8	<u>LOW</u> - Lowe's Companies, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.9	<u>MCD</u>-McDonald's Corp.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.10	<u>MDI</u> - Medtronic plc	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
35.11	<u>MSFT</u> - Microsoft Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.12	<u>NEE</u> - NextEra Energy, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.13	<u>NSC</u> - Norfolk Southern Corporation	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.14	<u>UBSI</u> - United Bankshares Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
35.15	Wells Fargo Bank (Washington, DC) <i>Type: IRA Cash Accounts,</i>	Bank Deposit	Self	\$1,001 - \$15,000	Interest,	None (or less than \$201)
35.16	<u>TFC</u> - Truist Financial Corporation	Corporate Securities Stock	Self	\$50,001 - \$100,000	Dividends,	\$2,501 - \$5,000
36	Belle Meade Associates NY, L.P. <i>Company: Belle Meade Associates NY, L.P. (New York, NY) Description: Pooled Investment Fund</i>	Business Entity Limited Partnership (LP)	Self	\$500,001 - \$1,000,000	Excepted Investment Fund,	None (or less than \$201)
37	<u>WFC</u> - Wells Fargo & Company	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
38	Life Insurance Policy <i>Provider: Northwestern Mutual</i>	Life Insurance Whole	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
39	BMJ-Bristol-Myers Squibb Company (NYSE)	Corporate Securities Stock	Spouse	None (or less than \$1,001)	Dividends, Capital Gains,	\$2,501 - \$5,000
40	CSCO-Cisco Systems, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	\$2,501 - \$5,000

	Asset	Asset Type	Owner	Value	Income Type	Income
41	C-Citigroup Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	\$201 - \$1,000
42	<u>KO</u> - The Coca-Cola Company (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	\$1,001 - \$2,500
43	<u>XOM</u> - Exxon Mobil Corporation (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	\$201 - \$1,000
44	<u>INTC</u> - Intel Corporation (NASDAQ)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	\$201 - \$1,000
45	<u>IBM</u> - International Business Machines Corporation (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	\$201 - \$1,000
46	<u>MSFT</u> - Microsoft Corporation (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	\$2,501 - \$5,000
47	<u>UBSI</u> - United Bankshares, Inc. - Common Stock	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	\$1,001 - \$2,500
48	<u>WFC</u> - Wells Fargo & Company Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	\$201 - \$1,000
49	<u>CVCIGP II</u> Company: CVCIGP II U.S. Employees LP (New York, NY) Description: Fund of funds	Business Entity Limited Partnership (LP)	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	\$201 - \$1,000
50	<u>Edgewood Country Club</u> Company: Edgewood Country Club (Charleston, WV) Description: Social club	Corporate Securities Non-Public Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
51	Spouse IRA 1	Retirement Plans IRA	Spouse			

	Asset	Asset Type	Owner	Value	Income Type	Income
51.1	KO-The Coca-Cola Company (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.2	XOM-Exxon Mobil Corporation (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.3	JNJ-Johnson & Johnson (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.4	MCD-McDonald's Corp. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.5	MSFT-Microsoft Corporation (NASDAQ)	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	Dividends,	None (or less than \$201)
51.6	MDLZ-Mondelez International, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
51.7	PFE-Pfizer Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
51.8	AAPL-Apple Inc.	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Dividends,	None (or less than \$201)
52	Spouse IRA 2	Retirement Plans IRA	Spouse			
52.1	Wells Fargo (Charleston, WV) Type: Brokerage Sweep Account,	Bank Deposit	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.2	<u>AFL</u> - AFLAC Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.3	<u>APD</u> - Air Products & Chemicals Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
52.4	<u>ADI</u> - Analog Devices, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.5	<u>ADP</u> - Automatic Data Processing, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.6	<u>BDX</u> - Becton, Dickinson and Company (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.7	<u>CVX</u> - Chevron Corporation (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.8	<u>CB</u> - The Chubb Corporation (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.9	<u>CL</u> - Colgate-Palmolive Co. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.10	<u>EMR</u> - Emerson Electric Co. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.11	<u>FDS</u>-FactSet Research Systems Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.12	<u>GD</u> - General Dynamics Corporation (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.13	<u>LHX</u> - L3Harris Technologies, Inc.	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.14	<u>ITW</u> - Illinois Tool Works Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.15	<u>JNJ</u> - Johnson & Johnson (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
52.16	<u>LOW</u> - Lowe's Companies Inc. (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.17	<u>MCD</u> - McDonald's Corp. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.18	<u>MDT</u>-Medtronic plc (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.19	<u>MSFT</u> - Microsoft Corporation (NASDAQ)	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Dividends,	None (or less than \$201)
52.20	<u>NEE</u> - NextEra Energy, Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.21	<u>NSC</u> - Norfolk Southern Corporation (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.22	<u>ES</u> - Eversource Energy (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.23	<u>PAYX</u> - Paychex, Inc. (NASDAQ)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.24	<u>PEP</u> - PepsiCo, Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.25	<u>PSX</u> - Phillips 66 (NYSE)	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.26	<u>PG</u> - The Procter & Gamble Company (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.27	<u>IGT</u> - Target Corp. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
52.28	<u>WMT</u> - Wal-Mart Stores Inc. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.29	<u>WEC</u> -Wisconsin Energy Corp. (NYSE)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.30	<u>ABT</u> - Abbott Laboratories	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.31	<u>AMGN</u> - Amgen Inc.	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.32	<u>BLK</u> - BlackRock, Inc.	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.33	<u>NKE</u> - NIKE, Inc.	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.34	<u>ACN</u> - Accenture plc	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.35	<u>CSCO</u> - Cisco Systems, Inc.	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.36	<u>JPM</u> - JPMorgan Chase & Co.	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.37	<u>CMCSA</u> - Comcast Corporation	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.38	<u>AAPL</u> - Apple Inc.	Corporate Securities Stock	Spouse	\$50,001 - \$100,000	Dividends,	None (or less than \$201)
52.39	<u>LIN</u> - Linde plc	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
52.40	<u>AMT</u> - American Tower Corporation (REIT)	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.41	<u>UNH</u> - UnitedHealth Group Incorporated	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
52.42	<u>PPG</u> - PPG Industries, Inc. Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.43	<u>CMS</u> - CMS Energy Corporation Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.44	<u>COST</u> - Costco Wholesale Corporation - Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.45	<u>GWV</u> - W.W. Grainger, Inc. Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
52.46	<u>SPGI</u> - S&P Global Inc	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
53	Spouse IRA 3 CAP Group	Retirement Plans IRA	Spouse			
53.1	Wells Fargo Bank (Washington, DC) Type: IRA Cash Accounts,	Bank Deposit	Spouse	None (or less than \$1,001)	Interest,	None (or less than \$201)
53.2	<u>UBSI</u> - United Bankshares, Inc. - Common Stock	Corporate Securities Stock	Spouse	\$100,001 - \$250,000	Dividends,	None (or less than \$201)
54	Spouse Rollover IRA	Retirement Plans IRA	Spouse			

	Asset	Asset Type	Owner	Value	Income Type	Income
54.1	Belle Meade Associates NT LP <i>Company:</i> Belle Meade Associates (New York, NY) <i>Description:</i> Pooled Investment Fund	Business Entity Limited Partnership (LP)	Spouse	Over \$1,000,000 and held independently by spouse or dependent child	Excepted Investment Fund,	None (or less than \$201)
55	Life Insurance Policy <i>Provider:</i> Northwestern Mutual	Life Insurance Whole	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
56	United Bankshares unvested stock grants <i>Description:</i> Corporate Director (Charleston, WV)	Other Securities	Spouse	None (or less than \$1,001)	None,	None (or less than \$201)

Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

Transaction #	Transaction Date	Owner	Ticker	Asset Name	Type	Amount	Comment
1	02/06/2023	Spouse	--	chevron	Purchase	\$1,001 - \$15,000	--
2	02/23/2023	Spouse	--	wells fargo	Sale (Partial)	\$1,001 - \$15,000	--
3	04/04/2023	Spouse	DUK	Duke Energy Corporation (Holding Company) Common S	Sale (Full)	\$15,001 - \$50,000	--
4	04/04/2023	Spouse	UPS	United Parcel Service, Inc. Common Stock	Sale (Full)	\$1,001 - \$15,000	--
5	04/04/2023	Spouse	MCD	McDonald's Corporation Common Stock	Sale (Partial)	\$1,001 - \$15,000	--
6	05/10/2023	Spouse	--	Wells Fargo & Company Common Stock	Sale (Partial)	\$1,001 - \$15,000	--
7	05/10/2023	Spouse	XOM	Exxon Mobil Corporation Common Stock	Sale (Partial)	\$1,001 - \$15,000	--
8	05/10/2023	Spouse	C	Citigroup, Inc. Common Stock	Sale (Partial)	\$1,001 - \$15,000	--
9	05/10/2023	Spouse	BMJ	Bristol-Myers Squibb Company Common Stock	Sale (Full)	\$1,001 - \$15,000	--
10	06/07/2023	Spouse	WMT	Walmart Inc. Common Stock	Sale (Partial)	\$1,001 - \$15,000	--
11	06/12/2023	Spouse	AMGN	Amgen Inc. - Common Stock	Sale (Full)	\$1,001 - \$15,000	--
12	06/12/2023	Spouse	MSFT	Microsoft Corporation - Common Stock	Sale (Partial)	\$15,001 - \$50,000	--
13	06/12/2023	Spouse	CB	Chubb Limited Common Stock	Sale (Full)	\$1,001 - \$15,000	--
14	06/14/2023	Spouse	NKE	Nike, Inc. Common Stock	Purchase	\$1,001 - \$15,000	--
15	06/14/2023	Spouse	AAPL	Apple Inc. - Common Stock	Purchase	\$1,001 - \$15,000	--
16	06/14/2023	Spouse	CLX	Clorox Company (The) Common Stock	Sale (Full)	\$1,001 - \$15,000	--
17	06/22/2023	Spouse	MSFT	Microsoft Corporation - Common Stock	Sale (Partial)	\$1,001 - \$15,000	--

Transaction #	Transaction Date	Owner	Ticker	Asset Name	Type	Amount	Comment
18	08/02/2023	Spouse	AFL	Aflac Inc	Sale (Partial)	\$1,001 - \$15,000	--
19	08/02/2023	Spouse	FDS	Factset Research Systems Inc	Sale (Partial)	\$1,001 - \$15,000	--
20	08/22/2023	Spouse	AAPL	Apple Inc	Sale (Partial)	\$1,001 - \$15,000	--
21	08/22/2023	Spouse	MSFT	Microsoft Corp	Sale (Partial)	\$1,001 - \$15,000	--
22	08/22/2023	Spouse	LOW	Lowe's Companies	Sale (Partial)	\$1,001 - \$15,000	--
23	09/01/2023	Spouse	USB	U.S. Bancorp	Sale (Full)	\$1,001 - \$15,000	--
24	09/21/2023	Spouse	RTX	Rtx Corp	Sale (Full)	\$1,001 - \$15,000	--
25	09/22/2023	Spouse	UNH	Unitedhealth Group Inc	Purchase	\$1,001 - \$15,000	--
26	09/22/2023	Spouse	ACN	Accenture Plc	Purchase	\$1,001 - \$15,000	--
27	09/27/2023	Spouse	SPGI	S&P Global Inc	Purchase	\$1,001 - \$15,000	--
28	11/27/2023	Spouse	WFC	Wells Fargo & Company	Sale (Partial)	\$1,001 - \$15,000	--
29	11/27/2023	Spouse	SHEL	Royal Dutch Shell Plc ADR	Sale (Full)	\$1,001 - \$15,000	--
30	11/30/2023	Spouse	MSFT	Microsoft Corp	Sale (Partial)	\$1,001 - \$15,000	--
31	12/01/2023	Spouse	SPGI	S&P Global Inc	Purchase	\$1,001 - \$15,000	--
32	12/01/2023	Spouse	CMCSA	Comcast Corp A	Purchase	\$1,001 - \$15,000	--
33	12/01/2023	Spouse	CSCO	Cisco Systems Inc	Purchase	\$1,001 - \$15,000	--
34	12/01/2023	Spouse	CVX	Chevron Corp	Purchase	\$1,001 - \$15,000	--

Transaction #	Transaction Date	Owner	Ticker	Asset Name	Type	Amount	Comment
35	12/18/2023	Spouse	KO	Coca-Cola Company	Sale (Partial)	\$1,001 - \$15,000	--
36	12/18/2023	Spouse	PFE	Pfizer Inc	Sale (Partial)	\$1,001 - \$15,000	--
37	12/18/2023	Spouse	MDLZ	Mondelez Intl Inc	Sale (Partial)	\$1,001 - \$15,000	--
38	12/18/2023	Spouse	MSFT	Microsoft Corp	Sale (Partial)	\$1,001 - \$15,000	--
39	12/19/2023	Spouse	ACN	Accenture Plc	Sale (Partial)	\$1,001 - \$15,000	--
40	12/19/2023	Spouse	JPM	JP Morgan Chase & Company	Sale (Partial)	\$1,001 - \$15,000	--
41	12/19/2023	Spouse	ADI	Analog Devices	Sale (Partial)	\$1,001 - \$15,000	--
42	12/19/2023	Spouse	MSFT	Microsoft Corp	Sale (Partial)	\$1,001 - \$15,000	--
43	12/19/2023	Spouse	AAPL	Apple Inc	Sale (Partial)	\$1,001 - \$15,000	--
44	12/29/2023	Self	TFC	Truist Financial Corp	Sale (Partial)	\$15,001 - \$50,000	--

Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **No**

Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **No**

Part 6. Travel

Did you, your spouse, or dependent child receive any **reportable travel**? **No**

Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2008	Joint	Line of Credit	-	8.5% (revolving)	\$100,001 - \$250,000	United Bank Charleston, WV	n/a
2	2011	Spouse	Other (Margin loan)	-	11.25% (margin)	\$15,001 - \$50,000	Wells Fargo Charleston, WV	n/a
3	2016	Joint	Mortgage	0	3.625% (30 years)	\$250,001 - \$500,000	Wells Fargo Des Moines, IA	n/a
4	2016	Joint	Mortgage	0	7.875% (30 years)	\$100,001 - \$250,000	Wells Fargo Des Moines, IA	n/a

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **No**

Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **No**

Part 10. Compensation

Only required if you are a candidate or this is your first report: Did any person or entity pay more than \$5,000 to you or for services provided by you? **This is not my first report.**

Attachments & Comments

No attachments added.

No comments added.