

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2019

Report Required by the Ethics
in Government Act of 1978
(5 U.S.C. app. §§ 101-111)

1. Person Reporting (last name, first, middle initial) Stahl, Norman H.	2. Court or Organization US Court of Appeals - 1st Circuit	3. Date of Report 07/20/2020
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Senior Status	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2019 to 12/31/2019
7. Chambers or Office Address US Court of Appeals 1 Courthouse Way, Suite 8730 Boston, Massachusetts 02210		
IMPORTANT NOTES: The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.		

I. POSITIONS. (Reporting individual only; see pp. 9-13 of filing instructions)

☐ NONE (No reportable positions.)

POSITION

NAME OF ORGANIZATION/ENTITY

1. Board Member	Tufts Medical Center Board of Governors
2.	
3.	
4.	
5.	

II. AGREEMENTS. (Reporting individual only; see pp. 14-16 of filing instructions)

☒ NONE (No reportable agreements.)

DATE

PARTIES AND TERMS

1.	
2.	
3.	

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Name of Person Reporting

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III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions)*

A. Filer's Non-Investment Income



NONE *(No reportable non-investment income.)*

DATE

SOURCE AND TYPE

INCOME
(yours, not spouse's)

1.		
2.		
3.		
4.		

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)



NONE *(No reportable non-investment income.)*

DATE

SOURCE AND TYPE

1.		
2.		
3.		
4.		

IV. REIMBURSEMENTS -- *transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)



NONE *(No reportable reimbursements.)*

SOURCE

DATES

LOCATION

PURPOSE

ITEMS PAID OR PROVIDED

1.				
2.				
3.				
4.				
5.				

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V. GIFTS. (Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)

☒ NONE (No reportable gifts.)

SOURCE	DESCRIPTION	VALUE
1.		
2.		
3.		
4.		
5.		

VI. LIABILITIES. (Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)

☒ NONE (No reportable liabilities.)

CREDITOR	DESCRIPTION	VALUE CODE
1.		
2.		
3.		
4.		
5.		

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Name of Person Reporting

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
1. Ashland House Associates, LP, 9%, Bedford, NH - Rental Income	E	Rent	N	W					
2. Citizen's Bank, Cash, Checking and MM	A	Interest	J	T					
3. Martha's Vineyard Savings Bank, Cash	A	Interest	J	T					
4.									
5. Trust # 1 (H)									
6. -Exxon Mobil	B	Dividend	K	T					
7. -Kellogg Co	B	Dividend	L	T					
8. -Pepsico	B	Dividend	L	T					
9. -Charles Schwab Corp.	B	Dividend	L	T	Buy (add'l)	05/23/19	J		
10.					Buy (add'l)	07/02/19	J		
11.					Sold (part)	09/11/19	J		
12.					Sold (part)	09/25/19	J		
13.					Sold (part)	09/26/19	J		
14.					Sold (part)	09/14/19	J		
15.					Sold (part)	10/17/19	J		
16. -Alphabet Inc. Class C		None	K	T					
17. -Nestle SA	A	Dividend	K	T	Sold (part)	01/03/19	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
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18.					Sold (part)	05/31/19	J	B	
19.					Sold (part)	09/26/19	J	A	
20.					Sold (part)	12/23/19	J	A	
21. -Diageo PLC	A	Dividend	J	T	Sold (part)	05/09/19	J	B	
22.					Buy (add'l)	10/11/19	J		
23.					Sold (part)	12/23/19	J	B	
24. -Walt Disney Co	A	Dividend	K	T	Sold (part)	08/08/19	J	A	
25.					Sold (part)	12/23/19	J	A	
26. -LVMH MOET	A	Dividend	J	T					
27. -Comcast Corporation	A	Dividend	K	T	Buy (add'l)	01/30/19	J		
28.					Sold (part)	12/10/19	J	A	
29.					Sold (part)	12/23/19	J	A	
30. -McDonalds	A	Dividend	K	T	Sold (part)	05/13/19	J	B	
31.					Buy (add'l)	11/04/19	J		
32.					Sold (part)	12/10/19	J	B	
33. -Wal-mart Stores	A	Dividend	K	T	Sold (part)	07/26/19	J	A	
34.					Sold (part)	10/08/19	J	A	

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35.					Sold (part)	12/23/19	J	A	
36. -Facebook Class A		None	K	T	Buy (add'l)	09/10/19	J		
37.					Buy (add'l)	09/26/19	J		
38.					Sold (part)	12/10/19	J	B	
39. -Heineken NV FADR	A	Dividend	J	T	Sold (part)	01/30/19	J	A	
40.					Buy (add'l)	12/02/19	J		
41.					Buy (add'l)	12/12/19	J		
42.					Sold (part)	12/23/19	J	A	
43. -Marriott Intl Inc. Class A	A	Dividend			Sold (part)	02/06/19	J		
44.					Sold (part)	02/22/19	J		
45.					Sold (part)	05/20/19	J		
46.					Sold (part)	05/21/19	J	A	
47.					Sold	05/22/19	J	A	
48. -Microsoft Corp	A	Dividend	K	T	Sold (part)	12/23/19	J	B	
49. -Coca Cola	A	Dividend	K	T	Buy (add'l)	04/24/19	J		
50.					Sold (part)	06/06/19	J	A	
51.					Sold (part)	09/25/19	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
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52.					Sold (part)	12/10/19	J	A	
53.					Sold (part)	12/23/19	J	A	
54. -Darden Restaurants	A	Dividend	J	T	Buy (add'l)	07/31/19	J		
55.					Buy (add'l)	09/26/19	J		
56.					Buy (add'l)	10/15/19	J		
57.					Sold (part)	12/10/19	J		
58.					Buy (add'l)	12/19/19	J		
59.					Sold (part)	12/23/19	J		
60. -Ulta Beauty, Inc.		None	K	T	Sold (part)	01/09/19	J	A	
61.					Sold (part)	04/23/19	J	B	
62.					Buy (add'l)	09/18/19	J		
63.					Sold (part)	12/10/19	J	A	
64. -Ebay	A	Dividend			Sold	04/01/19	J	A	
65.					Sold (part)	09/24/19	J	A	
66.					Sold (part)	10/18/19	J	A	
67.					Sold	10/25/19	J		
68. -Home Depot	A	Dividend	K	T	Buy (add'l)	02/26/19	J		

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69.					Sold (part)	12/10/19	J	B	
70.					Sold (part)	12/23/19	J	A	
71. -Sherwin Williams Co	A	Dividend			Buy (add'l)	01/03/19	J		
72.					Sold (part)	09/26/19	J	A	
73.					Sold (part)	10/02/19	J	B	
74.					Sold	10/04/19	J	B	
75. -Starbucks	A	Dividend			Sold (part)	06/25/19	J	B	
76.					Sold (part)	06/26/19	J	B	
77.					Sold	07/01/19	J	A	
78. -Tiffany Co	A	Dividend	J	T	Buy (add'l)	01/10/19	J		
79.					Sold (part)	12/10/19	J	B	
80. -WW International (Formerly: Weight Watchers Intl)		None	J	T	Buy (add'l)	01/30/19	J		
81.					Sold (part)	07/08/19	J		
82.					Sold (part)	08/08/19	J		
83.					Sold (part)	09/03/19	J		
84.					Buy (add'l)	10/29/19	J		
85.					Buy (add'l)	12/26/19	J		

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86. -William Sonoma	A	Dividend	K	T	Buy (add'l)	08/08/19	J		
87.					Sold (part)	11/07/19	J	A	
88.					Sold (part)	12/23/19	J	A	
89. -Cash, Schwab Bank Sweep	A	Interest	K	T					
90. -US Treasury Bill Due 5/30/19	D	Interest			Matured	05/15/19	N		
91. -US Treasury Bill Due 8/15/19	D	Interest			Matured	08/15/19	M		
92. -US Treasury Bill Due 5/21/20		None	N	T	Buy	05/15/19	N		
93. -US Treasury Bill Due 8/13/20		None	M	T	Buy	08/15/19	M		
94. -Amazon		None	K	T	Buy	11/13/19	L		
95.					Buy (add'l)	11/18/19	L		
96. -American Express	A	Dividend	K	T	Buy	01/31/19	J		
97.					Buy (add'l)	04/09/19	J		
98.					Buy (add'l)	09/27/19	J		
99.					Buy (add'l)	10/02/19	J		
100.					Buy (add'l)	10/18/19	J		
101.					Sold (part)	12/10/19	J	A	
102.					Sold (part)	12/23/19	J		

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103. -Anheuser Busch	A	Dividend			Buy (add'l)	05/13/19	J		
104.					Sold (part)	07/29/19	J		
105.					Sold (part)	08/01/19	J		
106.					Sold (part)	09/18/19	J		
107.					Sold	10/03/19	J		
108. -Booking Holdings Inc		None			Buy	05/22/19	K		
109.					Buy (add'l)	06/14/19	J		
110.					Sold (part)	11/13/19	J	A	
111.					Sold (part)	11/18/19	J	A	
112.					Sold	11/20/19	J	A	
113. -Dicks Sporting Goods	A	Dividend	K	T	Buy	06/25/19	J		
114.					Buy (add'l)	06/26/19	J		
115.					Buy (add'l)	08/09/19	J		
116. -Dominos Pizza Inc	A	Dividend	J	T	Buy	09/25/19	J		
117. -Dunkin Brands Group	A	Dividend	J	T	Buy (add'l)	08/01/19	J		
118. -Ralph Lauren Corp Class A		None	J	T	Buy	10/14/19	J		
119.					Buy (add'l)	11/18/19	J		

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	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
120.					Buy (add'l)	11/20/19	J		
121.					Sold (part)	12/10/19	J	A	
122.									
123. Trust # 2 IRA (H)									
124. -Alphabet Inc. Class C		None	M	T	Sold (part)	01/04/19	J		
125.					Sold (part)	01/08/19	J		
126.					Sold (part)	02/04/19	J	B	
127.					Sold (part)	03/05/19	J	B	
128.					Sold (part)	03/11/19	J	D	
129.					Sold (part)	03/12/19	J	C	
130.					Sold (part)	04/16/19	J	C	
131.					Buy (add'l)	05/22/19	J		
132.					Buy (add'l)	05/23/19	J		
133.					Buy (add'l)	06/03/19	J		
134.					Buy (add'l)	06/05/19	J		
135.					Buy (add'l)	06/25/19	J		
136.					Sold (part)	07/24/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

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Name of Person Reporting

Stahl, Norman H.

Date of Report

07/20/2020

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
137.					Sold (part)	11/08/19	J	B	
138.					Sold (part)	11/12/19	J	B	
139.					Sold (part)	11/15/19	J	B	
140.					Sold (part)	12/19/19	J	B	
141. -Anheuser-Busch	B	Dividend			Buy (add'l)	01/16/19	J		
142.					Buy (add'l)	03/07/19	J		
143.					Sold (part)	04/16/19	J		
144.					Sold (part)	05/22/19	J		
145.					Sold (part)	06/20/19	J		
146.					Sold (part)	07/03/19	J		
147.					Sold (part)	07/19/19	J		
148.					Sold (part)	07/23/19	J		
149.					Sold (part)	07/25/19	J		
150.					Sold (part)	07/26/19	J		
151.					Sold (part)	07/29/19	J		
152.					Sold (part)	08/01/19	J		
153.					Sold (part)	08/02/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

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Name of Person Reporting

Stahl, Norman H.

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07/20/2020

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
154.					Sold (part)	09/03/19	J		
155.					Sold (part)	09/06/19	J		
156.					Sold (part)	09/12/19	J	A	
157.					Sold (part)	09/17/19	J	A	
158.					Sold (part)	09/18/19	K	B	
159.					Sold	09/20/19	J	B	
160.	-Booking Holdings, Inc.	None			Buy	05/17/19	J		
161.					Buy (add'l)	05/20/19	J		
162.					Buy (add'l)	05/22/19	J		
163.					Buy (add'l)	05/23/19	J		
164.					Buy (add'l)	05/28/19	J		
165.					Buy (add'l)	05/30/19	J		
166.					Sold (part)	07/26/19	J	A	
167.					Sold (part)	09/03/19	J	A	
168.					Sold (part)	11/04/19	J	B	
169.					Sold (part)	11/13/19	J	A	
170.					Sold (part)	11/18/19	K	B	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
171.					Sold	11/20/19	L	C	
172. -Charles Schwab Corp	B	Dividend			Sold (part)	01/04/19	J		
173.					Buy (add'l)	02/21/19	J		
174.					Buy (add'l)	03/07/19	J		
175.					Buy (add'l)	03/22/19	J		
176.					Sold (part)	04/16/19	J		
177.					Buy (add'l)	04/26/19	J		
178.					Sold (part)	05/22/19	J		
179.					Buy (add'l)	06/14/19	J		
180.					Buy (add'l)	06/20/19	J		
181.					Buy (add'l)	08/14/19	J		
182.					Sold (part)	09/03/19	J		
183.					Sold (part)	09/11/19	J		
184.					Sold (part)	09/20/19	J		
185.					Sold (part)	09/27/19	K		
186.					Sold (part)	10/11/19	J		
187.					Sold (part)	10/14/19	J		

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
188.					Sold (part)	10/15/19	J		
189.					Sold	10/17/19	K		
190. -Coca Cola Company	C	Dividend	M	T	Sold (part)	01/04/19	J	A	
191.					Buy (add'l)	01/09/19	J		
192.					Buy (add'l)	02/15/19	J		
193.					Buy (add'l)	02/19/19	J		
194.					Buy (add'l)	02/20/19	J		
195.					Buy (add'l)	02/22/19	J		
196.					Buy (add'l)	03/08/19	J		
197.					Buy (add'l)	04/03/19	J		
198.					Buy (add'l)	04/23/19	K		
199.					Buy (add'l)	04/24/19	J		
200.					Sold (part)	05/22/19	J	A	
201.					Sold (part)	06/05/19	K	B	
202.					Sold (part)	06/06/19	J	A	
203.					Sold (part)	06/20/19	J	A	
204.					Sold (part)	07/02/19	J	A	

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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Name of Person Reporting

Stahl, Norman H.

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
205.					Sold (part)	07/23/19	J	A	
206.					Sold (part)	07/26/19	J	A	
207.					Sold (part)	08/05/19	J	A	
208.					Sold (part)	08/14/19	J	A	
209.					Sold (part)	08/15/19	J	B	
210.					Sold (part)	08/23/19	J	B	
211.					Sold (part)	08/26/19	J	A	
212.					Sold (part)	09/03/19	J	A	
213.					Sold (part)	09/24/19	J	A	
214.					Sold (part)	09/25/19	J	A	
215.					Sold (part)	10/18/19	J		
216.					Buy (add'l)	10/21/19	J		
217.					Buy (add'l)	10/25/19	J		
218.					Buy (add'l)	11/04/19	J		
219.					Buy (add'l)	11/05/19	J		
220.					Buy (add'l)	11/07/19	J		
221.					Buy (add'l)	11/08/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
222.					Buy (add'l)	11/12/19	J		
223. -Comcast	C	Dividend	M	T	Sold (part)	01/04/19	J		
224.					Sold (part)	02/07/19	J	A	
225.					Sold (part)	03/01/19	J	A	
226.					Sold (part)	03/15/19	J	A	
227.					Sold (part)	04/16/19	J	A	
228.					Sold (part)	05/22/19	J	A	
229.					Sold (part)	07/12/19	J	A	
230.					Sold (part)	07/16/19	J	A	
231.					Sold (part)	09/03/19	J	A	
232.					Sold (part)	09/09/19	J	B	
233.					Sold (part)	09/12/19	J	B	
234.					Buy (add'l)	11/25/19	J		
235.					Buy (add'l)	12/04/19	J		
236.					Buy (add'l)	12/09/19	J		
237.					Buy (add'l)	12/10/19	J		
238.					Buy (add'l)	12/11/19	J		

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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Name of Person Reporting

Stahl, Norman H.

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
239. -Darden Restaurants	B	Dividend	L	T	Buy (add'l)	02/27/19	J		
240.					Buy (add'l)	03/06/19	J		
241.					Buy (add'l)	03/07/19	J		
242.					Buy (add'l)	03/08/19	J		
243.					Buy (add'l)	04/04/19	J		
244.					Buy (add'l)	04/17/19	J		
245.					Buy (add'l)	05/22/19	J		
246.					Sold (part)	05/22/19	J	A	
247.					Buy (add'l)	05/29/19	J		
248.					Buy (add'l)	07/31/19	J		
249.					Sold (part)	09/03/19	J		
250.					Buy (add'l)	09/19/19	J		
251.					Buy (add'l)	09/20/19	J		
252.					Buy (add'l)	09/26/19	J		
253.					Buy (add'l)	10/03/19	J		
254.					Buy (add'l)	10/10/19	J		
255.					Buy (add'l)	10/15/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
256.					Buy (add'l)	10/17/19	J		
257.					Buy (add'l)	12/19/19	J		
258. -Diageo, PLC	B	Dividend	M	T	Sold (part)	01/04/19	J	A	
259.					Sold (part)	05/22/19	J	B	
260.					Sold (part)	05/23/19	J	C	
261.					Buy (add'l)	07/19/19	J		
262.					Buy (add'l)	07/25/19	J		
263.					Buy (add'l)	09/19/19	J		
264.					Buy (add'l)	09/20/19	J		
265.					Buy (add'l)	10/11/19	J		
266.					Buy (add'l)	10/17/19	J		
267.					Buy (add'l)	10/25/19	J		
268.					Buy (add'l)	11/05/19	J		
269.					Buy (add'l)	11/08/19	J		
270.					Buy (add'l)	11/12/19	J		
271. -Dunkin Brands Group	B	Dividend	L	T	Sold (part)	01/04/19	J		
272.					Buy (add'l)	05/06/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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Name of Person Reporting

Stahl, Norman H.

Date of Report

07/20/2020

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
273.					Buy (add'l)	05/08/19	J		
274.					Buy (add'l)	05/22/19	J		
275.					Sold (part)	05/22/19	J	B	
276.					Buy (add'l)	05/28/19	J		
277.					Buy (add'l)	07/31/19	J		
278.					Buy (add'l)	08/01/19	J		
279.					Buy (add'l)	10/16/19	J		
280.					Buy (add'l)	11/20/19	J		
281.					Buy (add'l)	12/18/19	J		
282. -Ebay	B	Dividend			Sold (part)	01/04/19	J		
283.					Sold (part)	01/07/19	J		
284.					Sold (part)	01/08/19	J		
285.					Sold (part)	01/11/19	J		
286.					Sold (part)	01/14/19	J		
287.					Sold (part)	01/15/19	J		
288.					Sold (part)	01/17/19	J		
289.					Sold (part)	02/04/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

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Name of Person Reporting	Date of Report
Stahl, Norman H.	07/20/2020

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
290.					Sold (part)	02/06/19	J		
291.					Sold (part)	02/22/19	J		
292.					Sold (part)	03/05/19	J		
293.					Sold (part)	03/21/19	J		
294.					Sold (part)	04/01/19	J		
295.					Sold (part)	04/02/19	J		
296.					Sold (part)	04/16/19	J		
297.					Sold (part)	05/22/19	J		
298.					Sold (part)	07/12/19	J	A	
299.					Sold (part)	09/03/19	J	A	
300.					Sold (part)	10/11/19	J	A	
301.					Sold (part)	10/15/19	J	A	
302.					Sold (part)	10/18/19	J	A	
303.					Sold (part)	10/22/19	K	A	
304.					Sold	10/25/19	K	D	
305. -Facebook, Inc. Class A		None	M	T	Sold (part)	01/04/19	J		
306.					Sold (part)	01/09/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
307.					Sold (part)	02/04/19	J	A	
308.					Sold (part)	02/05/19	J	A	
309.					Sold (part)	02/25/19	J	A	
310.					Sold (part)	03/04/19	J	A	
311.					Sold (part)	03/05/19	J	A	
312.					Sold (part)	03/06/19	J	A	
313.					Sold (part)	03/08/19	J	A	
314.					Sold (part)	03/11/19	J	A	
315.					Sold (part)	03/13/19	J	A	
316.					Sold (part)	03/22/19	J	A	
317.					Sold (part)	04/04/19	J	A	
318.					Sold (part)	04/03/19	J	A	
319.					Sold (part)	05/22/19	J	A	
320.					Buy (add'l)	06/03/19	J		
321.					Buy (add'l)	06/05/19	J		
322.					Sold (part)	06/17/19	J	A	
323.					Sold (part)	06/18/19	J	A	

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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Name of Person Reporting

Stahl, Norman H.

Date of Report

07/20/2020

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
324.					Sold (part)	07/12/19	J	A	
325.					Buy (add'l)	07/19/19	J		
326.					Buy (add'l)	07/24/19	J		
327.					Buy (add'l)	07/25/19	J		
328.					Buy (add'l)	07/26/19	J		
329.					Buy (add'l)	07/25/19	J		
330.					Buy (add'l)	08/05/19	J		
331.					Buy (add'l)	08/14/19	J		
332.					Buy (add'l)	08/23/19	J		
333.					Sold (part)	09/03/19	J		
334.					Buy (add'l)	09/06/19	J		
335.					Buy (add'l)	09/25/19	J		
336.					Buy (add'l)	09/26/19	J		
337.					Sold (part)	11/12/19	J		
338.					Sold (part)	11/22/19	J		
339.					Sold (part)	11/27/19	J	B	
340.					Buy (add'l)	12/13/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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Name of Person Reporting

Stahl, Norman H.

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
341.					Sold (part)	12/19/19	J	B	
342. -Heineken NV	A	Dividend	L	T	Sold (part)	01/04/19	J		
343.					Sold (part)	01/10/19	J		
344.					Sold (part)	01/29/19	J		
345.					Sold (part)	01/30/19	K		
346.					Buy (add'l)	11/27/19	J		
347.					Buy (add'l)	12/02/19	K		
348.					Buy (add'l)	12/11/19	J		
349.					Buy (add'l)	12/12/19	K		
350.					Buy (add'l)	12/13/19	J		
351.					Buy (add'l)	12/17/19	J		
352.					Buy (add'l)	12/19/19	J		
353. -Home Depot	C	Dividend	M	T	Buy (add'l)	02/27/19	J		
354.					Sold (part)	04/08/19	J	A	
355.					Sold (part)	05/22/19	J	A	
356.					Sold (part)	06/03/19	J	A	
357.					Sold (part)	06/05/19	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
358.					Sold (part)	06/20/19	J	A	
359.					Sold (part)	07/26/19	J	B	
360.					Sold (part)	08/20/19	J	B	
361.					Sold (part)	08/21/19	J	B	
362.					Sold (part)	09/25/19	J	B	
363.					Sold (part)	09/26/19	J	B	
364.					Sold (part)	10/08/19	J	B	
365.					Buy (add'l)	11/20/19	J		
366.					Buy (add'l)	11/22/19	J		
367.					Buy (add'l)	12/11/19	J		
368. -LVMH MOET	B	Dividend	L	T	Sold (part)	01/04/19	J		
369.					Sold (part)	04/16/19	J	B	
370.					Buy (add'l)	07/25/19	J		
371.					Buy (add'l)	07/30/19	J		
372.					Buy (add'l)	08/02/19	J		
373.					Buy (add'l)	09/16/19	J		
374.					Sold (part)	11/06/19	J	B	

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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Name of Person Reporting

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)

375. -Marriott Intl Inc Class A	A	Dividend			Sold (part)	01/04/19	J		
376.					Sold (part)	02/15/19	J		
377.					Sold (part)	02/19/19	J		
378.					Sold (part)	02/20/19	J		
379.					Sold (part)	02/22/19	J		
380.					Sold (part)	04/16/19	J	A	
381.					Sold (part)	05/16/19	J	A	
382.					Sold (part)	05/17/19	K	A	
383.					Sold (part)	05/20/19	K	A	
384.					Sold (part)	05/21/19	K	B	
385.					Sold	05/22/19	K	C	
386. -McDonalds	C	Dividend	M	T	Sold (part)	01/04/19	J	B	
387.					Buy (add'l)	02/12/19	J		
388.					Buy (add'l)	02/13/19	J		
389.					Buy (add'l)	03/19/19	J		
390.					Sold (part)	04/16/19	J	B	
391.					Buy (add'l)	05/01/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
392.					Sold (part)	05/13/19	J	B	
393.					Sold (part)	05/23/19	J	B	
394.					Sold (part)	05/30/19	J	C	
395.					Sold (part)	06/03/19	J	C	
396.					Sold (part)	06/20/19	J	C	
397.					Sold (part)	07/08/19	J	C	
398.					Sold (part)	08/09/19	J	C	
399.					Sold (part)	08/13/19	J	B	
400.					Sold (part)	09/03/19	J	B	
401.					Buy (add'l)	09/11/19	J		
402.					Sold (part)	10/08/19	J	B	
403.					Buy (add'l)	10/22/19	K		
404.					Buy (add'l)	10/25/19	J		
405.					Buy (add'l)	10/28/19	J		
406.					Buy (add'l)	11/04/19	J		
407. -Microsoft Corp	A	Dividend	L	T	Buy (add'l)	01/11/19	J		
408.					Buy (add'l)	01/14/19	J		

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
409.					Buy (add'l)	01/29/19	J		
410.					Sold (part)	04/23/19	J	B	
411.					Sold (part)	05/01/19	J	B	
412.					Sold (part)	05/22/19	J	B	
413.					Sold (part)	06/20/19	J	B	
414.					Buy (add'l)	07/19/19	J		
415.					Buy (add'l)	07/31/19	J		
416.					Buy (add'l)	09/10/19	J		
417.					Buy (add'l)	09/11/19	J		
418.					Buy (add'l)	10/17/19	J		
419.					Buy (add'l)	10/18/19	J		
420.					Sold (part)	11/12/19	J	B	
421.					Sold (part)	11/15/19	J	C	
422.					Sold (part)	12/19/19	J	C	
423. -Nestle	C	Dividend	M	T	Sold (part)	01/03/19	J	A	
424.					Sold (part)	01/04/19	J	A	
425.					Sold (part)	03/08/19	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
426.					Sold (part)	07/26/19	J	B	
427.					Sold (part)	07/29/19	J	A	
428.					Sold (part)	08/28/19	J	B	
429.					Sold (part)	09/03/19	J	B	
430.					Sold (part)	09/26/19	J	C	
431.					Buy (add'l)	10/17/19	J		
432.					Buy (add'l)	11/26/19	J		
433.					Buy (add'l)	12/10/19	J		
434.					Buy (add'l)	12/17/19	J		
435.	-Sherwin William Co	A	Dividend		Buy (add'l)	01/03/19	J		
436.					Buy (add'l)	03/05/19	J		
437.					Buy (add'l)	03/06/19	J		
438.					Sold (part)	05/06/19	J	A	
439.					Sold (part)	07/23/19	J	B	
440.					Sold (part)	07/25/19	J	B	
441.					Sold (part)	07/26/19	J	A	
442.					Sold (part)	07/30/19	J	B	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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Name of Person Reporting

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
443.					Sold (part)	08/08/19	J	B	
444.					Sold (part)	08/30/19	J	A	
445.					Sold (part)	09/12/19	J	B	
446.					Sold (part)	09/24/19	J	A	
447.					Sold (part)	10/02/19	J	C	
448.					Sold	10/03/19	K	D	
449. -Starbucks Corp	A	Dividend			Sold (part)	01/04/19	J	A	
450.					Sold (part)	01/29/19	J	B	
451.					Sold (part)	04/23/19	J	B	
452.					Sold (part)	05/01/19	J	B	
453.					Sold (part)	05/08/19	J	B	
454.					Sold (part)	05/16/19	J	B	
455.					Sold (part)	06/13/19	J	B	
456.					Sold (part)	06/14/19	J	C	
457.					Sold	06/28/19	J	C	
458. -Tiffany & Co	B	Dividend			Sold (part)	01/04/19	J		
459.					Sold (part)	03/22/19	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
460.					Sold (part)	03/27/19	J	A	
461.					Sold (part)	04/02/19	J	A	
462.					Sold (part)	04/18/19	J	A	
463.					Sold (part)	04/23/19	J	A	
464.					Buy (add'l)	06/11/19	J		
465.					Buy (add'l)	06/13/19	J		
466.					Buy (add'l)	07/02/19	J		
467.					Buy (add'l)	08/14/19	J		
468.					Buy (add'l)	08/15/19	J		
469.					Sold (part)	08/29/19	J		
470.					Sold (part)	09/03/19	J		
471.					Sold (part)	09/13/19	J		
472.					Sold (part)	11/04/19	J	A	
473.					Sold (part)	11/21/19	K	C	
474.					Sold	11/25/19	L	E	
475. -Ultra Beauty Inc.		None	L	T	Sold (part)	03/21/19	J	C	
476.					Sold (part)	03/25/19	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
477.					Sold (part)	03/26/19	J	B	
478.					Sold (part)	04/01/19	J	B	
479.					Sold (part)	04/03/19	J	B	
480.					Sold (part)	04/17/19	J	C	
481.					Sold (part)	04/23/19	J	B	
482.					Buy (add'l)	06/24/19	J		
483.					Sold (part)	07/17/19	J	B	
484.					Buy (add'l)	07/29/19	J		
485.					Buy (add'l)	08/02/19	J		
486.					Buy (add'l)	08/14/19	J		
487.					Buy (add'l)	08/15/19	J		
488.					Buy (add'l)	08/30/19	J		
489.					Buy (add'l)	09/03/19	J		
490.					Buy (add'l)	09/09/19	J		
491.					Buy (add'l)	09/12/19	J		
492.					Buy (add'l)	12/10/19	J		
493.					Buy (add'l)	12/18/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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Name of Person Reporting

Stahl, Norman H.

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
494. -Walmart Stores Inc	B	Dividend	L	T	Buy (add'l)	01/30/19	J		
495.					Buy (add'l)	02/01/19	J		
496.					Buy (add'l)	02/20/19	J		
497.					Buy (add'l)	02/21/19	J		
498.					Buy (add'l)	02/26/19	J		
499.					Buy (add'l)	03/27/19	J		
500.					Sold (part)	04/03/19	J	A	
501.					Sold (part)	05/20/19	J	A	
502.					Sold (part)	05/22/19	J	A	
503.					Sold (part)	05/28/19	J	A	
504.					Sold (part)	05/29/19	J	A	
505.					Sold (part)	06/03/19	J	A	
506.					Sold (part)	06/05/19	J	A	
507.					Sold (part)	06/10/19	J	A	
508.					Sold (part)	06/13/19	J	A	
509.					Sold (part)	06/20/19	J	A	
510.					Sold (part)	08/15/19	J	B	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
511.					Sold (part)	08/16/19	J	A	
512.					Sold (part)	09/24/19	J	C	
513.					Sold (part)	09/25/19	J	C	
514.					Sold (part)	10/08/19	J	B	
515.					Sold (part)	11/01/19	J	B	
516.					Sold (part)	11/13/19	J	B	
517.					Buy (add'l)	11/20/19	J		
518.					Buy (add'l)	11/26/19	J		
519.					Sold (part)	12/13/19	J	C	
520. -Walt Disney Co	B	Dividend	M	T	Sold (part)	01/14/19	J	A	
521.					Buy (add'l)	02/13/19	J		
522.					Buy (add'l)	03/19/19	J		
523.					Buy (add'l)	03/20/19	J		
524.					Buy (add'l)	03/21/19	J		
525.					Buy (add'l)	03/22/19	J		
526.					Sold (part)	04/16/19	J	A	
527.					Sold (part)	05/22/19	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
528.					Sold (part)	06/13/19	J	A	
529.					Sold (part)	06/25/19	J	A	
530.					Sold (part)	07/01/19	J	B	
531.					Sold (part)	08/08/19	J	C	
532.					Sold (part)	09/03/19	J	B	
533.					Sold (part)	09/09/19	J	B	
534.					Buy (add'l)	09/27/19	J		
535.					Buy (add'l)	10/07/19	J		
536.					Buy (add'l)	10/15/19	J		
537.					Sold (part)	11/13/19	J	C	
538.					Sold (part)	11/22/19	J	B	
539.					Sold (part)	11/26/19	J	C	
540.					Sold (part)	12/17/19	J	C	
541. -William Sonoma	C	Dividend	L	T	Sold (part)	01/04/19	J		
542.					Buy (add'l)	02/21/19	J		
543.					Sold (part)	04/05/19	J		
544.					Buy (add'l)	05/13/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
545.					Sold (part)	05/22/19	J		
546.					Sold (part)	07/15/19	J	B	
547.					Buy (add'l)	08/01/19	J		
548.					Sold (part)	08/23/19	J	A	
549.					Buy (add'l)	08/29/19	J		
550.					Sold (part)	09/10/19	J	A	
551.					Sold (part)	10/21/19	J	A	
552.					Sold (part)	11/05/19	J	A	
553.					Sold (part)	11/06/19	J	A	
554.					Sold (part)	11/07/19	J	A	
555.					Sold (part)	11/13/19	J	A	
556.					Sold (part)	12/17/19	J	A	
557.					Sold (part)	12/18/19	J	A	
558.					Sold (part)	12/19/19	J	A	
559.	--WW International (Formerly: Weight Watchers Intl)	None	L	T	Buy (add'l)	01/03/19	J		
560.					Buy (add'l)	01/07/19	J		
561.					Buy (add'l)	01/10/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
562.					Buy (add'l)	01/11/19	J		
563.					Buy (add'l)	01/23/19	J		
564.					Buy (add'l)	01/30/19	J		
565.					Buy (add'l)	07/29/19	J		
566.					Sold (part)	09/03/19	J		
567.					Sold (part)	09/04/19	J		
568.					Sold (part)	09/25/19	J		
569.					Sold (part)	11/22/19	J		
570.					Buy (add'l)	12/26/19	J		
571. -Cash, Schwab Bank Sweep	A	Interest	L	T					
572. -US Treasury Note Due 5/15/19	D	Interest			Matured	05/15/19	N		
573. -US Treasury Note Due 4/30/19	A	Interest			Matured	04/30/19	N		
574. -US Treasury Bill Due 5/9/19	C	Interest			Matured	05/09/19	N		
575. -Wells Fargo CD Due 8/27/19	C	Interest			Matured	08/27/19	M		
576. -Bank of America CD Due 5/14/20		None	M	T	Buy	05/09/19	M		
577. -Bank Ozk CD Due 5/28/20	C	Interest	M	T	Buy	05/15/19	M		
578. -Cathay Bank CD Due 5/15/20	B	Interest			Buy	05/09/19	M		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
579.					Matured	08/29/19	M		
580. -Cathay Bank CD Due 9/10/20		None	L	T	Buy	08/27/19	M		
581. -New York Communi CD Due 5/22/20		None	M	T	Buy	05/15/19	M		
582. -US Treasury Note Due 9/15/20		None	L	T	Buy	09/03/19	L		
583. -US Treasury Note Due 4/30/21		None	N	T	Buy	04/23/19	M		
584. -Amazon		None	M	T	Buy	10/25/19	J		
585.					Buy (add'l)	11/12/19	J		
586.					Buy (add'l)	11/13/19	K		
587.					Buy (add'l)	11/15/19	J		
588.					Buy (add'l)	11/18/19	J		
589.					Buy (add'l)	11/20/19	K		
590.					Buy (add'l)	11/21/19	K		
591.					Buy (add'l)	12/10/19	J		
592.					Sold (part)	12/27/19	J	A	
593. -American Express	A	Dividend	M	T	Buy	01/31/19	J		
594.					Buy (add'l)	02/07/19	J		
595.					Buy (add'l)	02/08/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
596.					Buy (add'l)	02/21/19	J		
597.					Buy (add'l)	03/07/19	J		
598.					Buy (add'l)	03/22/19	J		
599.					Buy (add'l)	03/25/19	J		
600.					Buy (add'l)	04/09/19	J		
601.					Buy (add'l)	07/19/19	J		
602.					Buy (add'l)	08/23/19	J		
603.					Buy (add'l)	08/26/19	J		
604.					Buy (add'l)	09/03/19	J		
605.					Sold (part)	09/03/19	J		
606.					Buy (add'l)	09/27/19	J		
607.					Buy (add'l)	10/02/19	J		
608.					Buy (add'l)	10/03/19	J		
609.					Buy (add'l)	10/18/19	J		
610.					Buy (add'l)	10/24/19	J		
611.					Buy (add'l)	11/21/19	J		
612. -Dicks Sporting Goods	B	Dividend	K	T	Buy	06/20/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

 NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
613.					Buy (add'l)	06/21/19	J		
614.					Buy (add'l)	06/24/19	J		
615.					Buy (add'l)	06/25/19	J		
616.					Buy (add'l)	07/02/19	J		
617.					Buy (add'l)	07/31/19	J		
618.					Buy (add'l)	08/01/19	J		
619.					Buy (add'l)	08/09/19	J		
620.					Buy (add'l)	08/15/19	J		
621.					Buy (add'l)	08/23/19	J		
622.					Sold (part)	09/03/19	J		
623.					Buy (add'l)	09/18/19	J		
624.					Buy (add'l)	09/19/19	J		
625.					Sold (part)	11/05/19	J	A	
626.					Sold (part)	11/07/19	J	A	
627.					Sold (part)	11/26/19	J	A	
628.					Sold (part)	12/11/19	J		
629.					Sold (part)	12/12/19	J	B	

1 Income Gain Codes:
(See Columns B1 and D4)

2 Value Codes
(See Columns C1 and D3)

3 Value Method Codes
(See Column C2)

A =\$1,000 or less
F =\$50,001 - \$100,000
J =\$15,000 or less
N =\$250,001 - \$500,000
P3 =\$25,000,001 - \$50,000,000
Q =Appraisal
U =Book Value

B =\$1,001 - \$2,500
G =\$100,001 - \$1,000,000
K =\$15,001 - \$50,000
O =\$500,001 - \$1,000,000
R =Cost (Real Estate Only)
V =Other

C =\$2,501 - \$5,000
H1 =\$1,000,001 - \$5,000,000
L =\$50,001 - \$100,000
P1 =\$1,000,001 - \$5,000,000
P4 =More than \$50,000,000
S =Assessment
W =Estimated

D =\$5,001 - \$15,000
H2 =More than \$5,000,000
M =\$100,001 - \$250,000
P2 =\$5,000,001 - \$25,000,000
T =Cash Market

E =\$15,001 - \$50,000

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
630.					Sold (part)	12/18/19	J	B	
631. -Dominos Pizza	A	Dividend	L	T	Buy	09/17/19	J		
632.					Buy (add'l)	09/18/19	J		
633.					Buy (add'l)	09/24/19	K		
634.					Buy (add'l)	09/25/19	K		
635.					Buy (add'l)	09/25/19	J		
636.					Buy (add'l)	09/27/19	J		
637.					Buy (add'l)	10/14/19	J		
638.					Sold (part)	12/17/19	J	B	
639. -Ralph Lauren		None	L	T	Buy (add'l)	10/08/19	J		
640.					Buy (add'l)	10/10/19	J		
641.					Buy (add'l)	10/14/19	J		
642.					Buy (add'l)	10/18/19	J		
643.					Buy (add'l)	10/28/19	J		
644.					Buy (add'l)	11/18/19	K		
645.					Buy (add'l)	11/19/19	J		
646.					Buy (add'l)	11/20/19	K		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
647.					Buy (add'l)	11/21/19	J		
648.					Buy (add'l)	11/26/19	J		
649.					Sold (part)	12/19/19	J	A	
650.									
651. Trust # 3 (H)									
652. -Alphabet Inc. Class C		None	L	T	Buy (add'l)	07/19/19	K		
653.					Sold (part)	09/03/19	J	D	
654.					Buy (add'l)	09/10/19	J		
655. -Anheuser-Busch	A	Dividend			Buy (add'l)	02/22/19	J		
656.					Buy (add'l)	02/28/19	J		
657.					Buy (add'l)	05/09/19	J		
658.					Sold (part)	07/29/19	J		
659.					Sold (part)	08/01/19	J	A	
660.					Sold (part)	09/09/19	J	A	
661.					Sold (part)	09/18/19	K	C	
662.					Sold	10/03/19	J	A	
663. -Charles Schwab Corp	A	Dividend			Buy (add'l)	02/21/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
664.					Buy (add'l)	03/21/19	J		
665.					Buy (add'l)	03/27/19	J		
666.					Buy (add'l)	05/23/19	J		
667.					Buy (add'l)	07/02/19	J		
668.					Buy (add'l)	07/10/19	J		
669.					Sold (part)	09/10/19	K		
670.					Sold (part)	09/11/19	J		
671.					Sold (part)	09/17/19	J		
672.					Sold (part)	09/25/19	J		
673.					Sold (part)	09/26/19	J		
674.					Sold (part)	09/27/19	J		
675.					Sold (part)	10/10/19	J		
676.					Sold (part)	10/14/19	J		
677.					Sold	10/17/19	K		
678. -Coca Cola Company	C	Dividend	M	T	Buy (add'l)	04/23/19	J		
679.					Sold (part)	06/06/19	J	A	
680.					Sold (part)	08/15/19	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
681.					Sold (part)	08/23/19	J	A	
682.					Sold (part)	09/03/19	J	A	
683.					Sold (part)	09/25/19	J	A	
684.					Sold (part)	09/26/19	J	A	
685. -Comcast Corporation	B	Dividend	L	T	Buy (add'l)	01/24/19	J		
686.					Buy (add'l)	01/30/19	J		
687.					Sold (part)	07/26/19	J	A	
688.					Sold (part)	09/03/19	J		
689. -Darden Restaurants	B	Dividend	L	T	Buy (add'l)	04/04/19	J		
690.					Buy (add'l)	05/22/19	J		
691.					Buy (add'l)	05/29/19	J		
692.					Buy (add'l)	07/31/19	J		
693.					Sold (part)	09/03/19	J		
694.					Buy (add'l)	09/26/19	J		
695.					Buy (add'l)	10/02/19	J		
696.					Buy (add'l)	10/10/19	J		
697.					Buy (add'l)	10/15/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
698. -Diageo PLC	A	Dividend	L	T	Sold (part)	01/03/19	J	A	
699.					Sold (part)	05/09/19	J	B	
700.					Sold (part)	05/20/19	J	B	
701.					Buy (add'l)	09/18/19	J		
702.					Buy (add'l)	10/17/19	K		
703.					Buy (add'l)	10/28/19	J		
704. -Dunkin Brands Group	A	Dividend	L	T	Buy (add'l)	05/23/19	J		
705.					Buy (add'l)	07/31/19	J		
706.					Buy (add'l)	08/01/19	J		
707.					Sold (part)	09/03/19	J		
708.					Buy (add'l)	10/17/19	J		
709.					Buy (add'l)	11/20/19	J		
710. -Ebay	A	Dividend			Sold (part)	02/04/19	J		
711.					Sold (part)	02/22/19	J		
712.					Sold (part)	03/21/19	J		
713.					Sold (part)	04/01/19	J		
714.					Sold (part)	09/23/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
715.					Sold (part)	09/24/19	J	A	
716.					Sold (part)	10/18/19	K	C	
717.					Sold	10/25/19	K	B	
718. -Exxon Mobil	D	Dividend	M	T					
719. -Facebook Inc Class A		None	M	T	Sold (part)	03/26/19	J	A	
720.					Sold (part)	04/02/19	J	A	
721.					Sold (part)	04/04/19	J	A	
722.					Buy (add'l)	07/25/19	J		
723.					Buy (add'l)	08/23/19	J		
724.					Buy (add'l)	09/10/19	J		
725.					Buy (add'l)	09/23/19	J		
726.					Buy (add'l)	09/26/19	J		
727. -Heineken NV	A	Dividend	K	T	Sold (part)	01/30/19	K		
728.					Buy (add'l)	11/27/19	J		
729.					Buy (add'l)	12/02/19	J		
730.					Buy (add'l)	04/12/19	J		
731. -Home Depot	B	Dividend	L	T	Buy (add'l)	02/26/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
732. -LVMH MOET	A	Dividend	L	T	Buy (add'l)	08/14/19	J		
733.					Buy (add'l)	09/23/19	J		
734.					Buy (add'l)	10/02/19	J		
735. -Marriott Intl Inc. Class A	A	Dividend			Sold (part)	02/06/19	J		
736.					Sold (part)	02/20/19	J		
737.					Sold (part)	02/21/19	J		
738.					Sold (part)	02/22/19	J		
739.					Sold (part)	05/17/19	J	A	
740.					Sold (part)	05/20/19	J	A	
741.					Sold (part)	05/21/19	K	B	
742.					Sold	05/22/19	K	B	
743. -McDonalds	B	Dividend	M	T	Sold (part)	05/13/19	J	B	
744.					Sold (part)	07/15/19	J	B	
745.					Sold (part)	07/17/19	J	C	
746.					Sold (part)	08/09/19	J	C	
747.					Sold (part)	08/13/19	J	C	
748.					Buy (add'l)	10/28/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
749.					Buy (add'l)	11/04/19	J		
750. -Microsoft Corp	B	Dividend	L	T	Sold (part)	07/01/19	J	D	
751.					Sold (part)	09/03/19	J	B	
752. -Nestle	C	Dividend	L	T	Sold (part)	01/03/19	J		
753.					Sold (part)	02/28/19	J	A	
754.					Sold (part)	03/07/19	J	A	
755.					Sold (part)	05/31/19	J	B	
756.					Sold (part)	07/17/19	J	B	
757.					Sold (part)	07/26/19	J	A	
758.					Sold (part)	09/26/19	J	B	
759. -Pepsico	D	Dividend	M	T					
760. -Starbucks	A	Dividend			Sold (part)	01/23/19	J	A	
761.					Sold (part)	01/29/19	J	A	
762.					Sold (part)	03/04/19	J	B	
763.					Sold (part)	06/24/19	K	D	
764.					Sold (part)	06/25/19	J	C	
765.					Sold (part)	06/26/19	J	C	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
766.					Sold	07/01/19	J	D	
767. -Sherwin Williams Co	A	Dividend			Buy (add'l)	01/03/19	J		
768.					Buy (add'l)	03/06/19	J		
769.					Sold (part)	08/01/19	J	B	
770.					Sold (part)	09/26/19	J	C	
771.					Sold (part)	10/02/19	J	C	
772.					Sold (part)	10/04/19	J	C	
773.					Sold	10/28/19	J	D	
774. -Tiffany & Co	B	Dividend	K	T	Buy (add'l)	01/03/19	J		
775.					Buy (add'l)	01/10/19	J		
776.					Buy (add'l)	01/30/19	J		
777.					Buy (add'l)	02/15/19	J		
778.					Buy (add'l)	07/18/19	J		
779.					Buy (add'l)	08/15/19	J		
780.					Sold (part)	11/04/19	J	A	
781.					Sold (part)	11/06/19	J	B	
782.					Sold (part)	11/25/19	J	C	

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
783.					Sold (part)	12/16/19	K	D	
784. -Ulta Beauty Inc		None	L	T	Sold (part)	01/09/19	J	C	
785.					Sold (part)	01/17/19	J	B	
786.					Sold (part)	04/23/19	J	C	
787.					Buy (add'l)	09/04/19	J		
788.					Buy (add'l)	09/12/19	J		
789. -Wal-Mart Stores	B	Dividend	L	T	Buy (add'l)	04/09/19	J		
790.					Sold (part)	07/15/19	J	B	
791.					Sold (part)	07/26/19	J	A	
792.					Sold (part)	08/23/19	J	B	
793.					Sold (part)	10/08/19	J	B	
794.					Sold (part)	11/01/19	J	B	
795. -Walt Disney Co	B	Dividend	M	T	Sold (part)	01/08/19	J	A	
796.					Sold (part)	09/03/19	J	A	
797. -William Sonoma	B	Dividend	L	T	Buy (add'l)	02/08/19	J		
798.					Sold (part)	03/07/19	J		
799.					Buy (add'l)	08/01/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
800.					Buy (add'l)	08/09/19	J		
801.					Buy (add'l)	08/29/19	J		
802.					Sold (part)	09/11/19	J		
803.					Sold (part)	11/06/19	J	A	
804.					Sold (part)	11/15/19	J	A	
805.					Sold (part)	12/16/19	J	B	
806. -WW International (Formerly Weight Watchers Intl)		None	K	T	Buy (add'l)	01/03/19	J		
807.					Buy (add'l)	01/09/19	J		
808.					Buy (add'l)	01/23/19	J		
809.					Buy (add'l)	01/30/19	J		
810.					Sold (part)	07/19/19	J		
811.					Sold (part)	08/07/19	J		
812.					Sold (part)	08/08/19	J		
813.					Sold (part)	08/09/19	J		
814.					Sold (part)	08/14/19	J		
815.					Sold (part)	08/28/19	J		
816.					Sold (part)	09/03/19	J		

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
817.					Buy (add'l)	10/18/19	J		
818.					Buy (add'l)	11/06/19	J		
819.					Buy (add'l)	12/30/19	J		
820. -Cash, Schwab Bank Sweep	A	Interest	K	T					
821. -US Treasury Bill Due 5/2/19	C	Interest			Matured	05/02/19	N		
822. -US Treasury Bill Due 10/31/19	C	Interest			Buy	05/02/19	N		
823.					Matured	10/31/19	N		
824. -US Treasury Bill Due 4/30/20		None	N	T	Buy	10/31/19	N		
825. -Amazon		None	L	T	Buy	10/25/19	J		
826.					Buy (add'l)	11/13/19	K		
827.					Buy (add'l)	11/19/19	J		
828.					Buy (add'l)	11/20/19	K		
829. -American Express Co	A	Dividend	L	T	Buy	01/31/19	J		
830.					Buy (add'l)	02/08/19	J		
831.					Buy (add'l)	03/07/19	J		
832.					Buy (add'l)	04/09/19	J		
833.					Buy (add'l)	07/19/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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Stahl, Norman H.

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
834.					Buy (add'l)	08/23/19	J		
835.					Buy (add'l)	09/10/19	J		
836.					Buy (add'l)	09/27/19	J		
837.					Buy (add'l)	10/02/19	J		
838.					Buy (add'l)	10/07/19	J		
839.					Buy (add'l)	10/18/19	J		
840. -Booking Holdings		None			Buy	05/17/19	K		
841.					Buy (add'l)	05/20/19	K		
842.					Buy (add'l)	05/22/19	K		
843.					Buy (add'l)	05/23/19	J		
844.					Buy (add'l)	06/14/19	J		
845.					Sold (part)	09/03/19	J	A	
846.					Sold (part)	11/13/19	K	A	
847.					Sold (part)	11/18/19	K	A	
848.					Sold (part)	11/19/19	K	A	
849.					Sold	11/20/19	K	B	
850. -Dicks Sporting Goods	A	Dividend	L	T	Buy (add'l)	06/20/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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Name of Person Reporting

Stahl, Norman H.

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
851.					Buy (add'l)	06/24/19	K		
852.					Buy (add'l)	06/25/19	J		
853.					Buy (add'l)	06/26/19	J		
854.					Buy (add'l)	07/02/19	J		
855.					Buy (add'l)	08/01/19	J		
856.					Buy (add'l)	08/07/19	J		
857.					Buy (add'l)	08/09/19	J		
858.					Buy (add'l)	08/15/19	J		
859.					Sold (part)	09/03/19	J		
860.					Buy (add'l)	09/18/19	J		
861. -Dominos Pizza, Inc	A	Dividend	L	T	Buy	09/18/19	J		
862.					Buy (add'l)	09/24/19	J		
863.					Buy (add'l)	09/25/19	J		
864.					Buy (add'l)	09/26/19	K		
865.					Buy (add'l)	10/14/19	J		
866. -Ralph Lauren		None	L	T	Buy	10/08/19	J		
867.					Buy (add'l)	10/14/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000 J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000 L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
868.					Buy (add'l)	10/18/19	J		
869.					Buy (add'l)	10/28/19	J		
870.					Buy (add'l)	11/18/19	J		
871.					Buy (add'l)	11/19/19	J		
872.					Buy (add'l)	11/20/19	J		
873.									
874. Trust # 4 (H)									
875. Cash, Charles Schwab Bank	A	Interest	J	T					
876. -Town of Braintree MA 5%, Due 05/15/2019	A	Interest			Redeemed	05/15/19	J		
877. -Massachusetts St Wtr 5 %, Due 08/01/2021	A	Interest			Redeemed	08/01/19	K		
878. -Pittsfield Mass Rfdg St 5%, Due 03/01/2020	B	Interest	K	T					
879. -Massachusetts Bay Transn Auth 5% Due 07/01/2022	B	Interest	K	T					
880. - Nebraska St Public Powr Dist 5% Due 01/01/2025	A	Interest	K	T					
881. -Marshfield MA Muni Purpose Bond 5% Due 11/01/2024	A	Interest	K	T					
882. -Althens, AL 5% Due 02/01/2023	A	Interest	K	T					
883. -TX Southmost CLG 5% Due 02/15/2025	A	Interest	K	T					
884. -Peabody, MA 4% Due 7/15/21	A	Interest	K	T					

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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Stahl, Norman H.

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
885. -Georgetown, MA 4% Due 5/1/20	A	Interest	K	T					
886. -MA ST FED HWY 5% Due 6/15/26	A	Interest	K	T					
887. -MA ST SCH BLDG AUTH 5% Due 8/15/29	A	Interest	K	T					
888. -Boston MA 4% Due 03/01/27	A	Interest	K	T					
889. -Billerica Mass 5% Due 2/1/24	A	Interest	K	T					
890. -FL St B/E Lottery 5% Due 7/1/24	A	Interest	K	T					
891. -IN Mun Pwr Supps RE 5% Due 1/1/28	A	Interest	K	T					
892. -Barnstable MA 4% Due 2/15/25	A	Interest	K	T					
893. -Marlborough MA 4% Due 6/15/25	A	Interest	K	T					
894. -MA ST Trans FD 4% Due 6/1/28	A	Interest	K	T					
895. -MA ST Wtr Res Auth 5% Due 8/1/27	A	Interest	K	T					
896. -Pennsylvania St 5% Due 1/1/27	A	Interest			Redeemed	11/06/19	K		
897. -WI St Hlth Ed FA 5% Due 8/15/30	A	Interest	K	T					
898. -Concord MA 5% Due 1/15/27		None	K	T	Buy	10/01/19	K		
899. -IL St Toll Hwy Auth 5% Due 1/1/27		None	K	T	Buy	11/06/19	K		
900. -MA Bay Tran Auth 4% Due 7/1/26	A	Interest	K	T	Buy	06/07/19	K		
901. -Comm of MA 5% Due 7/1/27	A	Interest	K	T	Buy	01/04/19	K		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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Name of Person Reporting

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
902. -US Treasury NT 1.875%	A	Interest			Buy	07/30/19	K		
903.					Sold	10/01/19	K		
904.									
905. Trust # 5 IRA (H)									
906. -ALPS ETF TR Alerian MLP	A	Dividend			Sold (part)	12/19/19	J		
907.					Sold	12/20/19	J		
908. -Welltower, Inc.	A	Dividend	J	T					
909. -Altria Group Inc.	A	Dividend	J	T	Buy (add'l)	06/26/19	J		
910. -Bank of Montreal	A	Dividend	J	T					
911. -BCE Inc Com New	A	Dividend	J	T					
912.									
913. -Lockheed Martin Corp.	A	Dividend	J	T					
914. -Merck & Co Inc.	A	Dividend			Sold (part)	10/17/19	J		
915. -Royal Dutch Shell PLC	A	Dividend	J	T					
916. -American Electric Power	A	Dividend			Sold	08/14/19	J		
917. -Chevron	A	Dividend	J	T					
918. -HSBC Holdings PLC	A	Dividend			Sold	08/14/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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Name of Person Reporting

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VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
919. -Simon Property Group, Inc.	A	Dividend	J	T					
920. -Digital Realty Trust, Inc.	A	Dividend	J	T					
921. -Duke Energy	A	Dividend	J	T					
922. -Eaton Corporation	A	Dividend			Sold	08/14/19	J		
923. -Verizon	A	Dividend	J	T					
924. -Abbvie	A	Dividend	J	T					
925. -Caterpillar	A	Dividend	J	T					
926. -Cisco Systems	A	Dividend	J	T					
927. -Crown Castle Internaional Corp	A	Dividend	J	T					
928. -IBM	A	Dividend	J	T					
929. -CVS Health Corp	A	Dividend	J	T	Buy	08/14/19	J		
930.					Buy (add'l)	08/15/19	J		
931. -Dominion Energy	A	Dividend	J	T	Buy	08/14/19	J		
932. -Gilead Sciences	A	Dividend	J	T	Buy	12/19/19	J		
933.					Buy (add'l)	12/20/19	J		
934. -Keycorp New	A	Dividend	J	T	Buy	08/14/19	J		
935. -Williams Companies		None	J	T	Buy	12/19/19	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

NONE (No reportable income, assets, or transactions.)

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
936.					Buy (add'l)	12/20/19	J		

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

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P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

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M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

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IX. CERTIFICATION.

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. app. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: **s/ Norman H. Stahl**

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 104)

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544