

# STATEMENT OF ECONOMIC INTERESTS COVER PAGE

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Date Initial Filing Received
Filing Official Use Only
MAR 28 2024

A PUBLIC DOCUMENT

Please type or print in ink.			Ī	ULARE COUNTY EMPLOYEES RETIREMENT ASSOCIATION
NAME OF FILER (LAST)	(FIRST)		(MIDDLE)	
Ricci	David			
1. Office, Agency, or Court				
Agency Name (Do not use acronyms)				
Tulare County				
Division, Board, Department, District, if applicable		Your Position		
Tulare County Employees Retirement	Association	Consultant		
► If filing for multiple positions, list below or on a	an attachment. (Do not u	se acronyms)		
Agency		Position		
Agency:		Position		
2. Jurisdiction of Office (Check at least o	ne box)			
☐ State		Judge, Retired	Judae. Pro Tem J	udge, or Court Commissioner
		(Statewide Juriso		augo, or court commissioner
Multi-County		County of Tul.	are	
City of		Other		
3. Type of Statement (Check at least one I				
Annual: The period covered is January 1, 2 December 31, 2023.	023, through	Leaving Office	:: Date Left (Check on	
-or- The period covered is/	/ thursday	☐ The period		ary 1, 2023, through the date
December 31, 2023.	_/, through	of leaving o		ary 1, 2020, through the date
Assuming Office: Date assumed/_			covered is leaving office.	, through
Candidate: Date of Election	and office sough	t, if different than Part 1: _		
. Schedule Summary (required)	► Total numbe	r of pages including	this cover na	uae.
Schedules attached		. or pages moraumg	and dover pa	
Schedule A-1 - Investments – schedule at	ttached	Schedule C - Income	oans & Busines	s Positions - schedule attached
Schedule A-2 - Investments – schedule at	r	Schedule D - Income -		
Schedule B - Real Property – schedule at	Г			ayments - schedule attached
concade 2 - Near Property - solicatio at	itaoriou			
-or- None - No reportable interests of	n anv schedule			
. Verification	. any concurre			
MAILING ADDRESS STREET	CITY		STATE	ZIP CODE
(Business or Agency Address Recommended - Public Documen	AND THE PARTY OF T			
150 N. Riverside Plaza	Chica		IL	60606
		EMAIL ADDRESS		
(312 ) 364-8030		dricci@williamblai		
I have used all reasonable diligence in preparing the herein and in any attached schedules is true and	is statement. I have revi complete. I acknowledge	ewed this statement and to this is a public document.	tne best of my kr	nowledge the information contained
I certify under penalty of perjury under the law	s of the State of Californ	rnia that the foregoing is	true and correct	
Date Signed	ř	Signature David Ricc	i A	Digitally signed by David Ricci Date: 2024.03.27 12:30:09 -05'00'
(month, day, year)				tement with your filing official.)

#### SCHEDULE C Income, Loans, & Business **Positions**

(Other than Gifts and Travel Payments)

CALIFORNIA FOR	
Name	Jax-san a Maria

► 1. INCOME RECEIVED	► 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME	NAME OF SOURCE OF INCOME
William Blair Investment Management, LLC	
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
150 N. Riverside Plaza, Chicago, IL 60606	
BUSINESS ACTIVITY, IF ANY, OF SOURCE	BUSINESS ACTIVITY, IF ANY, OF SOURCE
Investment Management	
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
Portfolio Manager	
GROSS INCOME RECEIVED No Income - Business Position Only	GROSS INCOME RECEIVED No Income - Business Position Only
\$500 - \$1,000 \$1,000	
\$10,001 - \$100,000 OVER \$100,000	\$10,001 - \$100,000 S1,001 - \$10,000 OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED	
Salary Spouse's or registered domestic partner's income	CONSIDERATION FOR WHICH INCOME WAS RECEIVED  Salary Spouse's or registered domestic partner's income
(For self-employed use Schedule A-2.)	(For self-employed use Schedule A-2.)
Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)	Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)
Sale of	Sale of
(Real property, car, boat, etc.)	(Real property, car, boat, etc.)
Loan repayment	Loan repayment
Commission or Rental Income, list each source of \$10,000 or more	Commission or Rental Income, list each source of \$10,000 or more
(Describe)	(Describe)
Other(Describe)	Other
(Describe)  2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING P	(Describe)
* You are not required to report loans from a commercial a retail installment or credit card transaction, made in the	lending institution, or any indebtedness created as part of ne lender's regular course of business on terms available status. Personal loans and loans received not in a lender's
NAME OF LENDER*	INTEREST RATE TERM (Months/Years)
	%
ADDRESS (Business Address Acceptable)	
2	SECURITY FOR LOAN
BUSINESS ACTIVITY, IF ANY, OF LENDER	None Personal residence
	Real Property
HIGHEST BALANCE DURING REPORTING PERIOD	Street address
\$500 - \$1,000	
\$1,001 - \$10,000	City
S10,001 - \$100,000	Guarantor
OVER \$100,000	Other(Describe)
	(Describe)
Comments:	



March 27, 2023

Susie Brown TCERA 136 N Akers St Visalia, CA 93291

Dear Ms. Brown:

David Ricci, a portfolio manager to Tulare County, filed his Form 700. Please be advised with regard to the filing that:

- Previously county officials have confirmed that only securities that could be potential investments in the account(s) managed by Mr. Ricci should be reported.
- Based on that understanding, it has been determined that there were no securities for Mr. Ricci
  to disclose.
- Legal & Compliance reviewed and presented that information to Mr. Ricci for purposes of filing these reports.

Should you have any questions regarding the form, please feel free to contact me at (332) 262-2596.

Sincerely,

Dan Carey

**Deputy General Counsel** 

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### RECEIVED

# CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION

## STATEMENT OF ECONOMIC INTERESTS COVER PAGE

Date Initial Filing Received

A PUBLIC DOCUMENT

TULARE COUNTY EMPLOYEES'
RETIREMENT ASSOCIATION

Please type or print in ink.	RETIREMENT ASSOCIATION
NAME OF FILER (LAST) (FIRST)	(MIDDLE)
Golan Jim	
1. Office, Agency, or Court	
Agency Name (Do not use acronyms)	
Tulare County	
Division, Board, Department, District, if applicable	Your Position
Tulare County Employees Retirement Association	Consultant
▶ If filing for multiple positions, list below or on an attachment. (Do not us	e acronyms)
Agency:	Position:
2. Jurisdiction of Office (Check at least one box)	3 15
State	Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
Multi-County	County of Tulare
City of	Other
3. Type of Statement (Check at least one box)	
Annual: The period covered is January 1, 2023, through December 31, 2023.	Leaving Office: Date Left/
The period covered is, through December 31, 2023.	The period covered is January 1, 2023, through the date of leaving office.
Assuming Office: Date assumed/	☐ The period covered is, through the date of leaving office.
Candidate: Date of Election and office sough	nt, if different than Part 1:
4. Schedule Summary (required) ► Total numbe	r of pages including this cover page:
Schedules attached	
Schedule A-1 - Investments - schedule attached	Schedule C - Income, Loans, & Business Positions - schedule attached
Schedule A-2 - Investments – schedule attached	Schedule D - Income - Gifts - schedule attached
Schedule B - Real Property – schedule attached	Schedule E - Income - Gifts - Travel Payments - schedule attached
-or- None - No reportable interests on any schedule	
5. Verification	STATE ZIP CODE
MAILING ADDRESS STREET CITY (Business or Agency Address Recommended - Public Document)	-
150 N. Riverside Plaza Chica	
DAYTIME TELEPHONE NUMBER	EMAIL ADDRESS
(312 ) 364-5359	jgolan@williamblair.com
herein and in any attached schedules is true and complete. I acknowledge	
I certify under penalty of perjury under the laws of the State of Califo	ornia that the foregoing is true and correct.
Date Signed March 27, 2024	Signature (File the originally signed paper statement with your filing official.)

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

CALIFORN	NA FORM $700$
FAIR POLITICA	L PRACTICES COMMISSION
Name	

1. INCOME RECEIVED	▶ 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME	NAME OF SOURCE OF INCOME
William Blair Investment Management, LLC	Dividend Income from Schedule A-1 Declared Stock
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
150 N. Riverside Plaza, Chicago, IL 60606	150 N. Riverside Plaza, Chicago, IL
BUSINESS ACTIVITY, IF ANY, OF SOURCE	BUSINESS ACTIVITY, IF ANY, OF SOURCE
Investment Management	Dividend Income from Schedule A-1 Declared Stock
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
Portfolio Manager	Portfolio Manager
GROSS INCOME RECEIVED No Income - Business Position Only	GROSS INCOME RECEIVED No Income - Business Position Only
\$500 - \$1,000 \$1,001 - \$10,000	\$500 - \$1,000 \$1,001 - \$10,000
S10,001 - \$100,000 OVER \$100,000	S10,001 - \$100,000 OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED	CONSIDERATION FOR WHICH INCOME WAS RECEIVED
Salary Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)	Salary Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)
Partnership (Less than 10% ownership, For 10% or greater use Schedule A-2.)	Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)
Sale of(Real property, car, boat, etc.)	Sale of
(Real property, car, boat, etc.)  Loan repayment	(Real property, car, boat, etc.)
Commission or Rental Income, list each source of \$10,000 or more	Commission or Rental Income, list each source of \$10,000 or more
Commission of Prema moone, as each source of \$10,000 of more	Commission of Prema income, as each source of \$10,000 of mole
(Describe)	(Describe)
Other	Other
(Describe)  > 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING F	(Describe)
a retail installment or credit card transaction, made in the	lending institution, or any indebtedness created as part of he lender's regular course of business on terms available status. Personal loans and loans received not in a lender's s:
NAME OF LENDER*	INTEREST RATE TERM (Months/Years)
ADDRESS (Business Address Acceptable)	%
	SECURITY FOR LOAN
BUSINESS ACTIVITY, IF ANY, OF LENDER	None Personal residence
HIGHEST DALANGE DUDING DEDOCTING DEDOC	Real Property
HIGHEST BALANCE DURING REPORTING PERIOD	
\$500 - \$1,000	City
\$1,001 - \$10,000	Guarantor
\$10,001 - \$100,000	
OVER \$100,000	Other(Describe)
Comments:	

LIVANOVA PLC ORD GBP1.00 (DI)	Health Care	\$2,000 - \$10,000	Stock
CHEESECAKE FACTORY INC	Consumer Discretionary	\$10,001 - \$100,000	Stock
BREAD FINANCIAL HOLDINGS INC COM	Financials	\$2,000 - \$10,000	Stock
HANESBRANDS INC COM USDO.01	Consumer Discretionary	\$2,000 - \$10,000	Stock
PALOMAR HLDGS INC COM	Financials	\$10,001 - \$100,000	Stock
DIGI INTERNATIONAL INC	Information Technology	\$100,001 - \$1,000,000	Stock
UNITIL CORP	Utilities	\$10,001 - \$100,000	Stock
EXPEDITORS INTERNATIONAL OF WASHINGTON INC	Industrials	\$10,001 - \$100,000	Stock



March 27, 2023

Susie Brown TCERA 136 N Akers St Visalia, CA 93291

Dear Ms. Brown:

Jim Golan, a portfolio manager to Tulare County, filed his Form 700. Please be advised with regard to the filing that:

- Previously county officials have confirmed that only securities that could be potential investments in the account(s) managed by Mr. Golan should be reported.
- The Legal & Compliance department of William Blair has reviewed the information it has
  obtained from this third party to determine the securities that could have been potential
  investment targets for the county's account.
- Legal & Compliance reviewed and presented this information to Mr. Golan for purposes of filing these reports.

Should you have any questions regarding the form, please feel free to contact me at (332) 262-2596.

Sincerely,

Dan Carey

**Deputy General Counsel** 

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# STATEMENT OF ECONOMIC INTERESTS COVER PAGE

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A PUBLIC DOCUMENT

MAR 28 2024

Please type or print in ink.			TULARE COUNTY EMPLOYEES
NAME OF FILER (LAST)	(FIRST)	(MIDDLE)	RETIREMENT ASSOCIATION
Zimmenrman	Nick		
1. Office, Agency, or Court			
Agency Name (Do not use acronyms)			
Tulare County			
Division, Board, Department, District, if appli	cable	Your Position	
Tulare County Employees Retirer	ment Association	Consultant	
▶ If filing for multiple positions, list below o	r on an attachment. (Do not use	e acronyms)	
Agency:	-	Position:	
2. Jurisdiction of Office (Check at le	ast one box)		
State		Judge, Retired Judge, Pro Tem (Statewide Jurisdiction)	Judge, or Court Commissioner
Multi-County		County of Tulare	
City of		500 AX 9X 4	
3. Type of Statement (Check at least			
Annual: The period covered is Januar December 31, 2023.		Leaving Office: Date Left	one circle.)
The period covered is December 31, 2023.	/, through	The period covered is Jan of leaving office.	uary 1, 2023, through the date
Assuming Office: Date assumed		17.7	, through
Candidate: Date of Election	and office sought,	if different than Part 1:	
4. Schedule Summary (required)	► Total number	of pages including this cover	page:
Schedules attached			
Schedule A-1 - Investments - sched	lule attached	Schedule C - Income, Loans, & Busin	ess Positions - schedule attached
Schedule A-2 - Investments - sched	lule attached	Schedule D - Income - Gifts - schedu	ule attached
Schedule B - Real Property - sched	lule attached	Schedule E - Income - Gifts - Travel	Payments - schedule attached
-or- None - No reportable interes	sts on any schedule		
5. Verification			
MAILING ADDRESS STREET (Business or Agency Address Recommended - Public De	CITY ocument)	STATE	ZIP CODE
150 N. Riverside Plaza	Chicag	10 IL	60606
DAYTIME TELEPHONE NUMBER		EMAIL ADDRESS	
(312 ) 364-8291		nzimmerman@williamblair.co	m
I have used all reasonable diligence in prepa herein and in any attached schedules is true		wed this statement and to the best of my	
I certify under penalty of perjury under the			ect.
Date Signed	e	<sub>ignature</sub> Nicholas Zimmermar	Digitally signed by Nicholas Zimmerman
(month, day, year)			Date: 2024.03.27 11:37:05 -05'00' statement with your filing official.)

### SCHEDULE C Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700 FAIR POLITICAL PRACTICES COMMISSION
Name
5 E

► 1. INCOME RECEIVED	► 1. INCOME RECEIVED
NAME OF SOURCE OF INCOME	NAME OF SOURCE OF INCOME
William Blair Investment Management, LLC	Dividend Income from Schedule A-1 Declared Stock
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)
150 N. Riverside Plaza, Chicago, IL 60606	150 N. Riverside Plaza, Chicago, IL
BUSINESS ACTIVITY, IF ANY, OF SOURCE	BUSINESS ACTIVITY, IF ANY, OF SOURCE
Investment Management	Dividend Income from Schedule A-1 Declared Stock
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION
Portfolio Manager	Portfolio Manager
GROSS INCOME RECEIVED No Income - Business Position Only	GROSS INCOME RECEIVED No Income - Business Position Only
\$500 - \$1,000 \$1,001 - \$10,000	\$500 - \$1,000 \$1,001 - \$10,000
S10,001 - \$100,000 OVER \$100,000	S10,001 - \$100,000 OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED	CONSIDERATION FOR WHICH INCOME WAS RECEIVED
Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)	Salary Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)
Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)	Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)
Sale of	Sale of
(Real property, car, boat, etc.)	(Real property, car, boat, etc.)
	Loan repayment
Commission or Rental Income, list each source of \$10,000 or more	Commission or Rental Income, list each source of \$10,000 or more
(Describe)	(Describe)
Other	Other
(Describe)	(Describe)
a retail installment or credit card transaction, made in the	ending institution, or any indebtedness created as part of e lender's regular course of business on terms available tatus. Personal loans and loans received not in a lender's
NAME OF LENDER*	INTEREST RATE TERM (Months/Years)
ADDRESS (Business Address Acceptable)	%
	SECURITY FOR LOAN
BUSINESS ACTIVITY, IF ANY, OF LENDER	None Personal residence
	Real Property
HIGHEST BALANCE DURING REPORTING PERIOD	Street address
\$500 - \$1,000	-
\$1,001 - \$10,000	City
\$10,001 - \$100,000	Guarantor
OVER \$100,000	
	Other(Describe)
	**************************************
Comments:	

	DESCRIPTION OF	TION OF FAIR MARKET VALUE (Select from drop down list)	NATURE OF INVESTMENT (Select from drop down list.	IF APPLICABLE, LIST DATE (mm/dd/yyyy)	
	THIS BUSINESS ACTIVITY		If "other," describe)	ACQUIRED	DISPOSED
SOUTHWEST AIRLINES CO	Industrials	\$2,000 - \$10,000	Stock		
KAZATOMPROM JSC NAC GDR (EACH REPR 1	ORD) (REG S) Energy	\$100,001 - \$1,000,000	Stock		
ETBLUE AWYS CORP COM	Industrials	\$2,000 - \$10,000	Stock		



March 27, 2023

Susie Brown TCERA 136 N Akers St Visalia, CA 93291

Dear Ms. Brown:

Nick Zimmerman, a portfolio manager to Tulare County, filed his Form 700. Please be advised with regard to the filing that:

- Previously county officials have confirmed that only securities that could be potential investments in the account(s) managed by Mr. Zimmerman should be reported.
- The Legal & Compliance department of William Blair has reviewed the information it has
  obtained from this third party to determine the securities that could have been potential
  investment targets for the county's account.
- Legal & Compliance reviewed and presented this information to Mr. Zimmerman for purposes of filing these reports.

Should you have any questions regarding the form, please feel free to contact me at (332) 262-2596.

Sincerely,

Dan Carey

**Deputy General Counsel** 

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### CALIFORNIA FORM FAIR POLITICAL PRACTICES COMMISSION

#### STATEMENT OF ECONOMIC INTERESTS **COVER PAGE**

Date Initial Filing Received

A PUBLIC DOCUMENT

TULARE COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

Please type or print in ink.			RETIREMENT ASSOCIATI
NAME OF FILER (LAST)	(FIRST)	(MIDDLE)	
Crowe	Daniel		
. Office, Agency, or Court		P. Commission of the Commissio	
Agency Name (Do not use acronyms)			
Tulare County			
Division, Board, Department, District, if a	pplicable	Your Position	
Tulare County Employees Reti	rement Association	Consultant	
▶ If filing for multiple positions, list below	v or on an attachment. (Do not use	acronyms)	
Agency:		Position:	·
Jurisdiction of Office (Check a	t least one box)		
State		Judge, Retired Judge, Pro Tem J (Statewide Jurisdiction)	ludge, or Court Commissioner
Multi-County	R.	County of Tulare	
City of		Other	
. Type of Statement (Check at lea			Ÿ,
Annual: The period covered is January December 31, 2023.	1.1 8.20	Leaving Office: Date Left(Check on	
The period covered is December 31, 2023.		☐ The period covered is Janua of leaving office.	ary 1, 2023, through the date
Assuming Office: Date assumed _		7.5	_/, through
Candidate: Date of Election	and office sought, i	if different than Part 1:	
Schedule Summary (required	) ► Total number (	of pages including this cover pa	ige:
Schedules attached			
Schedule A-1 - Investments - sci	nedule attached	Schedule C - Income, Loans, & Busines	ss Positions - schedule attached
Schedule A-2 - Investments - sci		Schedule D - Income - Gifts - schedule	
Schedule B - Real Property - sch	nedule attached	Schedule E - Income - Gifts - Travel Pa	ayments - schedule attached
Or- None - No reportable inte	rests on any schedule		
Verification  MAILING ADDRESS STREET	CITY	07175	
MAILING ADDRESS STREET (Business or Agency Address Recommended - Public	c Document)	STATE	ZIP CODE
150 N. Riverside Plaza	Chicago	) IL	60606
DAYTIME TELEPHONE NUMBER	E	EMAIL ADDRESS	
(312 ) 364-8172		dcrowe@williamblair.com	
I have used all reasonable diligence in pre- herein and in any attached schedules is t	rue and complete. I acknowledge the	nis is a public document.	-
I certify under penalty of perjury under	the laws of the State of California	a that the foregoing is true and correct	t.
Date Signed 04/01/2024	Sia		Digitally signed by Daniel E Crowe Date: 2024.04.01 07:52:26 -05'00'
(month, day, year)		(File the originally signed paper sta	

### SCHEDULE C Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

CALIFORNIA FORM	
Name	and the second

► 1. INCOME RECEIVED	► 1. INCOME RECEIVED	
NAME OF SOURCE OF INCOME	NAME OF SOURCE OF INCOME	
William Blair Investment Management, LLC	Dividend Income from Schedule A-1 Declared Stock	
ADDRESS (Business Address Acceptable)	ADDRESS (Business Address Acceptable)	
150 N. Riverside Plaza, Chicago, IL 60606	150 N. Riverside Plaza, Chicago, IL	
BUSINESS ACTIVITY, IF ANY, OF SOURCE	BUSINESS ACTIVITY, IF ANY, OF SOURCE	
Investment Management	Dividend Income from Schedule A-1 Declared Stock	
YOUR BUSINESS POSITION	YOUR BUSINESS POSITION	
Portfolio Manager	Portfolio Manager	
GROSS INCOME RECEIVED No Income - Business Position Only	GROSS INCOME RECEIVED No Income - Business Position Only	
\$500 - \$1,000 \$1,001 - \$10,000	\$500 - \$1,000 <b>II</b> \$1,001 - \$10,000	
■ OVER \$100,000	S10,001 - \$100,000 OVER \$100,000	
CONSIDERATION FOR WHICH INCOME WAS RECEIVED	CONSIDERATION FOR WHICH INCOME WAS RECEIVED	
Salary Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)	Salary Spouse's or registered domestic partner's income (For self-employed use Schedule A-2.)	
Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)	Partnership (Less than 10% ownership, For 10% or greater use Schedule A-2.)	
Sale of	Sale of	
(Real property, car, boat, etc.)	(Real property, car, boat, etc.)	
Loan repayment	Loan repayment	
Commission or Rental Income, list each source of \$10,000 or more	Commission or Rental Income, list each source of \$10,000 or more	
(Describe)	(Describe)	
Other	Other	
(Describe)	(Describe)	
► 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PE	The Table	
a retail installment or credit card transaction, made in the	lending institution, or any indebtedness created as part of e lender's regular course of business on terms available status. Personal loans and loans received not in a lender's :	
NAME OF LENDER*	INTEREST RATE TERM (Months/Years)	
ADDRESS (Business Address Acceptable)	%	
The state of the s	SECURITY FOR LOAN	
BUSINESS ACTIVITY, IF ANY, OF LENDER	None Personal residence	
Seemess No. 1111, in Nati, of Editoria		
HIGHEST BALANCE DURING REPORTING PERIOD	Real PropertyStreet address	
\$500 - \$1,000		
\$1,001 - \$10,000	City	
	Guarantor	
\$10,001 - \$100,000		
OVER \$100,000	Other(Describe)	
	(Describe)	

AENA SME SA UNSPONSORED ADR Transportation \$2,000 - \$10,000 Stock  AFLAC INC COM USDO.10 Insurance \$2,000 - \$10,000 Stock  AMERICAN INTERNATIONAL GROUP INC Insurance \$2,000 - \$10,000 Stock  AMERIPRISE FINANCIALINC COM USDO.01 Capital Markets \$2,000 - \$10,000 Stock  AMERISOURCEBERGEN CORPORATION COM USDO.01 Health Care Providers & Services \$2,000 - \$10,000 Stock  AUTOZONE INC COM USDO.01 Specialty Retail \$10,001 - \$100,000 Stock  BANK OF NEW YORK MELLON CORP COM USDO.01 Capital Markets \$2,000 - \$10,000 Stock  BLOCK INC CL A Financial Services \$2,000 - \$10,000 Stock  CBRE GROUP INC COM USDO.01 CLASS A Real Estate Management & Development \$2,000 - \$10,000 Stock  CITIZENS FINL GROUP INC COM USDO.00 Household Products \$2,000 - \$10,000 Stock  CLOROX CO COM USDO.001 CLASS A Real Estate Management & \$2,000 - \$10,000 Stock  CLOROX CO COM USDO.001 CLOSS COM USDO.001 COmmercial Services \$2,000 - \$10,000 Stock  COPART INC COM USDO.0001 COM USDO.0001 Stock  CORNING INC Electronic Equipment Instruments & Compc \$2,000 - \$10,000 Stock  COSTAR GROUP INC COM Specialized REITS \$2,000 - \$10,000 Stock  CROWN CASTLE INC COM Specialized REITS \$2,000 - \$10,000 Stock	t from_
AMERICAN INTERNATIONAL GROUP INC  AMERIPRISE FINANCIALINC COM USD0.01  Capital Markets  \$2,000 - \$10,000  Stock  AMERISOURCEBERGEN CORPORATION COM USD0.01  Health Care Providers & Services  \$2,000 - \$10,000  Stock  AUTOZONE INC COM USD0.01  Specialty Retail  \$10,001 - \$100,000  Stock  BANK OF NEW YORK MELLON CORP COM USD0.01  Capital Markets  \$2,000 - \$10,000  Stock  BLOCK INC CL A  Financial Services  \$2,000 - \$10,000  Stock  CBRE GROUP INC COM USD0.01 CLASS A  Real Estate Management & Development  \$2,000 - \$10,000  Stock  CLITIZENS FINL GROUP INC COM  USD1.00  Household Products  \$2,000 - \$10,000  Stock  COPART INC COM USD0.0001  Commercial Services & Supplies  \$2,000 - \$10,000  Stock  CORNING INC  CORNING INC  Electronic Equipment Instruments & Compc \$2,000 - \$10,000  Stock  CROWN CASTLE INC COM  Specialized REITS  \$2,000 - \$10,000  Stock  Stock	
AMERIPRISE FINANCIALINC COM USD0.01  AMERISOURCEBERGEN CORPORATION COM USD0.01  AUTOZONE INC COM USD0.01  BANK OF NEW YORK MELLON CORP COM USD0.01  Capital Markets  S2,000 - \$10,000  Stock  Stock  BANK OF NEW YORK MELLON CORP COM USD0.01  Capital Markets  S2,000 - \$10,000  Stock  BLOCK INC CL A  Financial Services  S2,000 - \$10,000  Stock  CBRE GROUP INC COM USD0.01 CLASS A  Real Estate Management & Development  S2,000 - \$10,000  Stock  CLOROX CO COM USD1.00  COPART INC COM USD0.001  COMMERCIAL SERVICES & S2,000 - \$10,000  Stock  CORNING INC  COSTAR GROUP INC  CROWN CASTLE INC COM  Specialized REITS  S2,000 - \$10,000  Stock  Stock  CROWN CASTLE INC COM  Stock  Stock  Specialized REITS  S2,000 - \$10,000  Stock  Specialized REITS  S2,000 - \$10,000  Stock  Specialized REITS  S2,000 - \$10,000  Stock  Specialized REITS	
AMERISOURCEBERGEN CORPORATION COM USDO.01 Health Care Providers & Services \$2,000 - \$10,000 Stock  AUTOZONE INC COM USDO.01 Specialty Retail \$10,001 - \$100,000 Stock  BANK OF NEW YORK MELLON CORP COM USDO.01 Capital Markets \$2,000 - \$10,000 Stock  BLOCK INC CL A Financial Services \$2,000 - \$10,000 Stock  CBRE GROUP INC COM USDO.01 CLASS A Real Estate Management & Development \$2,000 - \$10,000 Stock  CITIZENS FINL GROUP INC COM USDI.00 Stock  CLOROX CO COM USDI.00 Household Products \$2,000 - \$10,000 Stock  COPART INC COM USDO.0001 Commercial Services & Supplies \$2,000 - \$10,000 Stock  CORNING INC Electronic Equipment Instruments & Compc \$2,000 - \$10,000 Stock  COSTAR GROUP INC COM Specialized REITS \$2,000 - \$10,000 Stock  CROWN CASTLE INC COM Specialized REITS \$2,000 - \$10,000 Stock	
AUTOZONE INC COM USDO.01 Specialty Retail \$10,001 - \$100,000 Stock  BANK OF NEW YORK MELLON CORP COM USDO.01 Capital Markets \$2,000 - \$10,000 Stock  BLOCK INC CL A Financial Services \$2,000 - \$10,000 Stock  CBRE GROUP INC COM USDO.01 CLASS A Real Estate Management & Development \$2,000 - \$10,000 Stock  CITIZENS FINL GROUP INC COM USDI.00 Stock  CLOROX CO COM USDI.00 Household Products \$2,000 - \$10,000 Stock  COPART INC COM USDO.001 COMMUSDI.00 Stock  CORNING INC Electronic Equipment Instruments & Compc \$2,000 - \$10,000 Stock  COSTAR GROUP INC COM Specialized REITS \$2,000 - \$10,000 Stock  CROWN CASTLE INC COM Specialized REITS \$2,000 - \$10,000 Stock	
BANK OF NEW YORK MELLON CORP COM USD0.01 Capital Markets \$2,000 - \$10,000 Stock  BLOCK INC CLA  CBRE GROUP INC COM USD0.01 CLASS A Real Estate Management & Development \$2,000 - \$10,000 Stock  CITIZENS FINL GROUP INC COM USD1.00 Stock  CLOROX CO COM USD1.00 Household Products \$2,000 - \$10,000 Stock  COPART INC COM USD0.001 Commercial Services & Supplies \$2,000 - \$10,000 Stock  CORNING INC Electronic Equipment Instruments & Compc \$2,000 - \$10,000 Stock  COSTAR GROUP INC COM Specialized REITS \$2,000 - \$10,000 Stock  CROWN CASTLE INC COM Specialized REITS \$2,000 - \$10,000 Stock	
BLOCK INC CL A  CBRE GROUP INC COM USDO.01 CLASS A  CITIZENS FINL GROUP INC COM  USD1.00  COPART INC COM  USD0.001  CORNING INC  COSTAR GROUP INC  COM  CROWN CASTLE INC COM  Stock  Financial Services  S2,000 - \$10,000  Stock  S2,000 - \$10,000  Stock  Stock  S2,000 - \$10,000  Stock  Stock  Stock  COMM USD1.00  Commercial Services & Supplies  S2,000 - \$10,000  Stock  Stock  CORNING INC  Electronic Equipment Instruments & Compc \$2,000 - \$10,000  Stock  COSTAR GROUP INC  CROWN CASTLE INC COM  Specialized REITS  S2,000 - \$10,000  Stock  Stock  CROWN CASTLE INC COM  Stock  Stock  Stock  Stock  Stock  CROWN CASTLE INC COM  Stock  Stock  Stock  Stock  Stock  Stock  Stock  Stock  CROWN CASTLE INC COM  Stock	
CBRE GROUP INC COM USD0.01 CLASS A  Real Estate Management & Development \$2,000 - \$10,000 Stock  CITIZENS FINL GROUP INC COM  USD1.00 Banks \$2,000 - \$10,000 Stock  CLOROX CO COM USD1.00 Household Products \$2,000 - \$10,000 Stock  COPART INC COM USD0.0001 Commercial Services & Supplies \$2,000 - \$10,000 Stock  CORNING INC Electronic Equipment Instruments & Compc \$2,000 - \$10,000 Stock  COSTAR GROUP INC Real Estate Management & Development \$2,000 - \$10,000 Stock  CROWN CASTLE INC COM Specialized REITS \$2,000 - \$10,000 Stock	
CITIZENS FINL GROUP INC COM  CLOROX CO COM  USD1.00  Household Products  \$2,000 - \$10,000  Stock  COPART INC COM  USD0.0001  Commercial Services & Supplies  \$2,000 - \$10,000  Stock  CORNING INC  Electronic Equipment Instruments & Compc \$2,000 - \$10,000  Stock  COSTAR GROUP INC  Real Estate Management & Development  \$2,000 - \$10,000  Stock  CROWN CASTLE INC COM  Specialized REITS  \$2,000 - \$10,000  Stock	
CLOROX CO COM USD1.00 Household Products \$2,000 - \$10,000 Stock  COPART INC COM USD0.0001 Commercial Services & Supplies \$2,000 - \$10,000 Stock  CORNING INC Electronic Equipment Instruments & Compc \$2,000 - \$10,000 Stock  COSTAR GROUP INC Real Estate Management & Development \$2,000 - \$10,000 Stock  CROWN CASTLE INC COM Specialized REITS \$2,000 - \$10,000 Stock	
COPART INC COM USD0.0001 Commercial Services & Supplies \$2,000 - \$10,000 Stock  CORNING INC Electronic Equipment Instruments & Compc \$2,000 - \$10,000 Stock  COSTAR GROUP INC Real Estate Management & Development \$2,000 - \$10,000 Stock  CROWN CASTLE INC COM Specialized REITS \$2,000 - \$10,000 Stock	
CORNING INC Electronic Equipment Instruments & Compc \$2,000 - \$10,000 Stock  COSTAR GROUP INC Real Estate Management & Development \$2,000 - \$10,000 Stock  CROWN CASTLE INC COM Specialized REITS \$2,000 - \$10,000 Stock	
COSTAR GROUP INC CROWN CASTLE INC COM Specialized REITS S2,000 - \$10,000 Stock Stock	
CROWN CASTLE INC COM Specialized REITs \$2,000 - \$10,000 Stock	
DEVCOMING Local Facility and Complete Local Complet	
DEXCOM INC Health Care Equipment & Supplies \$2,000 - \$10,000 Stock	
DIAMONDBACK ENERGY INC COM USD0.01 Oil Gas & Consumable Fuels \$2,000 - \$10,000 Stock	
EXACT SCIENCES CORP Biotechnology \$2,000 - \$10,000 Stock	
FORTUNE BRANDS INNOVATIONS INC CO Building Products \$2,000 - \$10,000 Stock	
HESS CORPORATION COMUSD1.00 Oil Gas & Consumable Fuels \$2,000 - \$10,000 Stock	
HUBSPOT INC Software \$2,000 - \$10,000 Stock	
IDEXX LABORATORIES INC COM USD0.10 Health Care Equipment & Supplies \$2,000 - \$10,000 Stock	
KENVUE INC COM Personal Care Products \$2,000 - \$10,000 Stock	
KINDER MORGAN INC COM USD0.01 Oil Gas & Consumable Fuels \$2,000 - \$10,000 Stock	
MONGODB INC CL A IT Services \$2,000 - \$10,000 Stock	
MSCLINC Capital Markets \$2,000 - \$10,000 Stock	
PALANTIR TECHNOLOGIES INC CL A Software \$2,000 - \$10,000 Stock	
PAYCHEX INC COM USD0.01 Professional Services \$2,000 - \$10,000 Stock	
PRUDENTIAL FINANCIALINC Insurance \$2,000 - \$10,000 Stock	
PUBLIC SVC ENTERPRISE GRP INC COM Multi-Utilities \$2,000 - \$10,000 Stock	
QUANTA SERVICES COM USD0.00001 Construction & Engineering \$2,000 - \$10,000 Stock	
ROLLS ROYCE HOLDINGSSPON ADR EACH REP 1 ORD SHS Aerospace & Defense \$2,000 - \$10,000 Stock	
ROYAL CARIBBEAN GROUP COM USD0.01 Hotels Restaurants & Leisure \$2,000 - \$10,000 Stock	
TRAVELERS COMPANIES INC COM STK NPV Insurance \$2,000 - \$10,000 Stock	
UNITED AIRLS HLDGS INC COM Passenger Airlines \$2,000 - \$10,000 Stock	
XCEL ENERGY INC COM USD2.5 Electric Utilities \$2,000 - \$10,000 Stock	

IF APPLICABLE, LIST DATE (mm/dd/yyyy)



April 1, 2024

Melanie Tyler TCERA 136 N Akers St Visalia, CA 93291

Dear Ms. Brown:

Daniel Crowe, a portfolio manager to Tulare County, filed his Form 700. Please be advised with regard to the filing that:

- Previously county officials have confirmed that only securities that could be potential investments in the account(s) managed by Mr. Crowe should be reported.
- Based on that understanding, it has been determined that there were no securities for Mr. Crowe to disclose.
- Legal & Compliance reviewed and presented that information to Mr. Crowe for purposes of filing these reports.

Should you have any questions regarding the form, please feel free to contact me at (332) 262-2596.

Sincerely,

Dan Carey

**Deputy General Counsel**