Statement of Financial Interests for 2018



CONTACT INFORMATION				
Last Name:	First Name and Middle initial:			
Blais	Natalie			
Work Phone Number:	Other Phone:			
(617) 722-2425	Redacted			
Work Email:	Other Email:			
Natalie.Blais@mahouse.gov	Redacted			
Primary Residence Address:				
Redacted				
Contact mailling address				
Redacted				
You indicated that you did have a spouse residing in your household during 2018.				
You indicated that you did have dependent child(ren) residing in your household during 2018.				
	5 L-1-1			

Candidacy and Public Service

1. If you are a candidate for public office, please indicate the public office you are seeking.

Filer reported none.

Amendment Page 1 of 36

2. Identify the position you now hold, or have held, which requires you to file a Statement of Financial Interests and provide the required information for that position. If you held more than one public position which requires you to file, identify each position.

Agency Name	Address	Position	Date	Amount of Income
Massachusetts House of Representatives	State House, Rm 134, Boston, MA, 02133, US	State Representativ e	01/02/2019	N/A

3. Other than the position(s) identified in Question 2, identify every public position you held, and every public agency to which you provided services, at any time during 2018, whether compensated or not, and whether full- or part-time.

Public Agency	Public Agency Name	Address	Position	Amount of Income	Consultant / Contractor?	Services Provided
Municipal	Sunderland Public Library	School Street, Sunderland, MA, 01375, US	Trustee	N/A	N/A	

4. Identify every public position your spouse and/or any dependent child(ren) residing in your household held, and every public agency to which your spouse and/or any dependent child(ren) residing in your household provided services, at any time during 2018, whether compensated or not, and whether full- or part-time.

Filer reported none.

Private Employment and Leaves of Absence

5. Identify every Business for which you worked as an employee, manager, consultant, or independent contractor at any time during 2018, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Business Name	Self-employed	Address	Position	Income
Franklin County Chamber of Commerce	N/A	395 Main Street, PO Box 898, Greenfield, MA, 01302, US	Employee	\$60,001 to 100,000

Amendment Page 2 of 36

6. Identify any Business from wh	ich you were on a lea	ve of absence at any time during 2018, a	nd provide its address.
	l	Filer reported none.	
	ultant, or independent	or any dependent child(ren) residing in yo t contractor at any time during 2018, whe juired information for each.	
Business Name	Self-employed	Address	Position
Amherst College	N/A	220 South Pleasant Street, Amherst, MA, 01002, US	Employee
		Action C	
Business Ownership and Tra	ansfers		
	s of the outstanding s	or in part, an owner, partner, or proprieto stock or similar ownership interest, at any Filer reported none.	
whole or in part, an owner, partn	er, or proprietor, or in n 1% of any class of t juired information for e	any dependent child(ren) residing in you which your spouse and/or any depender he outstanding stock or similar ownership each. Filer reported none.	t child(ren) residing in
		a Business which you transferred to your g 2018, and provide the required informate provide the required informate provide the reported informate provide the reported none.	

Amendment Page 3 of 36

Service as an Officer, Director, or Trustee

11. Identify any Business in which you served as an officer, director, or trustee, at any time during 2018, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Business Name	Address	Position	Income
Franklin County Chamber of Commerce	395 Main Street, PO Box 898, Greenfield, MA, 01302, US	Director	\$60,001 to 100,000

12. Identify any Business in which your spouse and/or any dependent child(ren) residing in your household served as an officer, director, or trustee, at any time during 2018, whether compensated or not, and whether full- or part-time, and provide the required information for each.

Filer reported none.

NOTE: If the Filer answered "YES" to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member's name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member's address, the Filer was not required to provide that address.

Real Estate

13. Identify all Real Estate in Massachusetts which you owned directly or through a Business as of December 31, 2018, and which had an assessed value greater than \$1,000, and provide the required information for each Real Estate holding.

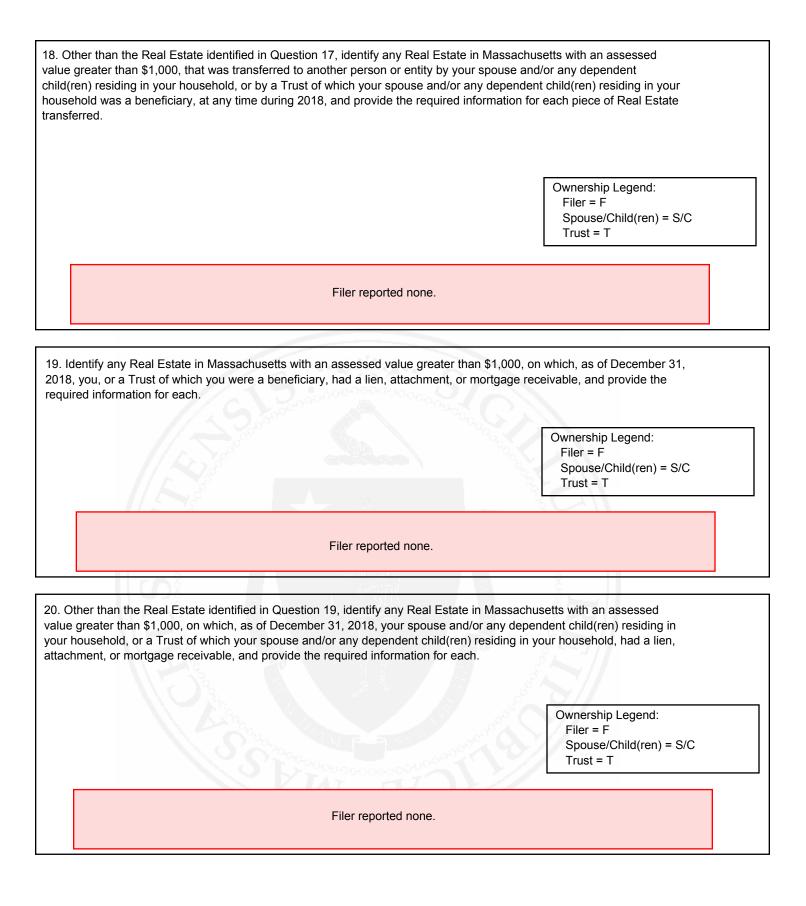
Ownership Legend:
Filer = F
Spouse/Child(ren) = S/C
Trust = T

Property Address	Owner	Transferred?	Transferor Name	Transferor Address	Assessed Value
Redacted	F, S/C	No			\$100,001 or more

Amendment Page 4 of 36

14. Other than the Real Estate identified in Question 13, identify all Real Estate in Massachus and/or any dependent child(ren) residing in your household owned directly or through a Busing 2018, and which had an assessed value greater than \$1,000, and provide the required information.	ess as of December 31,
Filer reported none.	
15. Identify any Trust of which you were a beneficiary, and which owned Real Estate in Massa 31, 2018, with an assessed value greater than \$1,000, and provide the required information for Estate holding.	
	Beneficiary Legend: Filer = F Spouse/Child(ren) = S/C Trust = T
Filer reported none.	
16. Other than the Real Estate identified in Question 15, identify any Trust of which your spourchild(ren) residing in your household was a beneficiary, and which owned Real Estate in Mass 31, 2018, with an assessed value greater than \$1,000, and provide the required information for Estate holding.	sachusetts as of December
Filer reported none.	
	9//
17. Identify any Real Estate in Massachusetts with an assessed value greater than \$1,000, the another person or entity by you, or by a Trust of which you were a beneficiary, at any time durequired information for each Real Estate holding.	
	Ownership Legend: Filer = F Spouse/Child(ren) = S/C Trust = T
Filer reported none.	

Amendment Page 5 of 36



Amendment Page 6 of 36

NOTE: If the Filer answered "YES" to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member's name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member's address, the Filer was not required to provide that address.

Financial Investments

21. Identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which you owned directly or through a Business, as of December 31, 2018, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Ownership Legend: Filer = F Spouse/Child(ren) = S/C Trust = T

Filer reported none.



Amendment Page 7 of 36

22. Other than the bonds or other securities identified in Question 21, identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which your spouse and/or any dependent child(ren) residing in your household owned directly or through a Business, as of December 31, 2018, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Name of Bond/ Other Security	Description of Investment
Boston Mass Water and Sewer A B/E/R Pre-Re	<u>Bond</u>
Mass St. Series C	Bond
Mass State Water Res Av	Bond
Mass State for ISS - 2025	Bond
Mass State for ISS - 2026	Bond
Mass State for ISS - 2027	Bond

Amendment Page 8 of 36

23. Identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which was owned as of December 31, 2018, by a Trust of which you were a beneficiary, whether directly or through a Business, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Beneficiary Legend:

Filer = F

Spouse/Child(ren) = S/C

Trust = T

Filer reported none.

24. Identify every bond or other security issued by the Commonwealth of Massachusetts or its political subdivisions, agencies, and authorities, which was owned as of December 31, 2018, by a Trust of which your spouse and/or any dependent child(ren) residing in your household was a beneficiary, whether directly or through a Business, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each such investment.

Filer reported none.



Amendment Page 9 of 36

25. Identify every Financial Investment that you owned directly or through a Business as of December 31, 2018, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each.

Ownership Legend: Filer = F Spouse/Child(ren) = S/C Trust = T

Name of Issuer	Owner	Description of Investment	Principal Place of Business or State of Incorporation	Address
AB Global Thematic Growth Fund, Inc Advisor Class(ATEYX)	F			
AllianzGl Global Sustainability Fund Class P(ASTPX)	F	5.0000000000000000000000000000000000000		
American Century Fundamental Equity Fund Institutional Class (AFEIX)	F	*		
Calvert U.S. Large Cap Value Responsible Index Fund Class I (CFJIX)	F			
Federated Hermes SDG Engagement EQ Fund Class Instl (FHESX)	F	Mutual Fund	Pennsylvania	Federated Investors Tower, 1001 Liberty Avenue, Pittsburgh, PA, 15222 3779, US
ISHARES Trust ISHARES ESG MSCI EAFE ETF (ESGD)	F	Exchange Traded Fund	California	BlackRock Fund Advisors , 400 Howard Street , San Francisco, CA, 94105, US

Amendment Page 10 of 36

Northern Global Sustainability Index Fund(NSRIX)	F				
UBS Global Sustainable Equity Fund Class P(BNUEX)	F				
UBS Engage for Impact Fund CL P (UEIPX)	F	Mutual Fund	New York		UBS Global Asset Management Americas, 1285 Avenue of the Americas, New York, NY, 10019 6028, US
iShares KLD 400 Social Index Fund (DSI)	P C	5	···· 5/		
Calvert Balanced Class Y (CBAYX)	F				
S	76 66 60 60 60 60 60 60 60 60 60 60 60 60			2000	
Domini International Social Equity Fund Class A Shares (DOMAX)	₽ A				
Neuberger Berman Socially	\\ F \(\Colon \)				
Responsive Fund Inst Cl (NBSLX)					

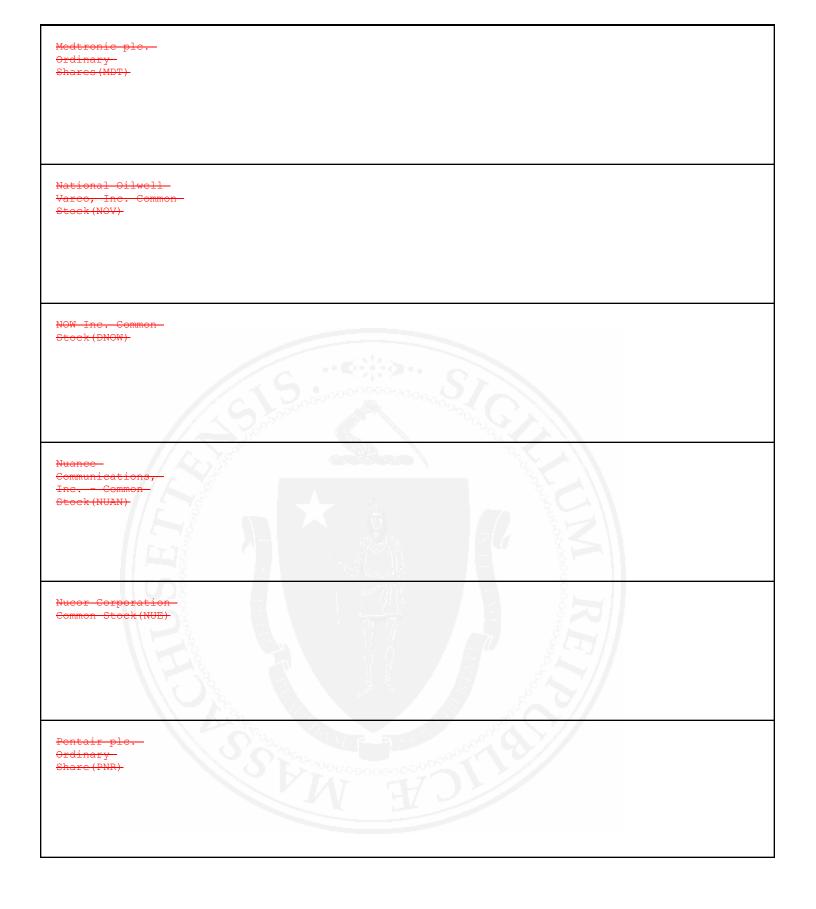
Amendment Page 11 of 36

Calvert Social Investment Fund Bond Ptf Class Y(CSIYX)	P				
Qualified- Investment Fund-	P				
Institutional Class (CRANX)					
Domini Social Bond Fd(DSBFX)	₽				
BlackRock Global Alloc A(MDLOX)	<u>F</u>	5 S			
- //£					
Calvert Green Bond Fund Class I(CGBIX)	<u>F</u>				
Calvert Income_ Fd Cl I(CINCX)	<u>F</u>			REJ	
UBS Sustainable	<u>F</u>	Bond	New York		UBS Global Asset
Development Bank Bond Fund (UDBPX)			Y 011		Management Americas, 1285 Avenue of the Americas, New York, NY, 10019, US
TIAA-CREF Social Choice Bond Fund Advisor Class (TSBHX)	<u>F</u>	Mutual Fund	<u>New York</u>		730 3rd Ave, New York, NY, 10017, US

Amendment Page 12 of 36

26. Other than the Financial Investments identified in Question 25, identify every Financial Investment that your spouse and/or any dependent child(ren) residing in your household owned directly or through a Business as of December 31, 2018, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each. For any Financial Investment not included on the drop-down list of publicly traded stock, you must provide the issuer's principal place of business or state of incorporation as well as its address. Liberty Media Stock (LMCA) Stock (LVNTA) Stock (LBRDA) Liberty Broadband

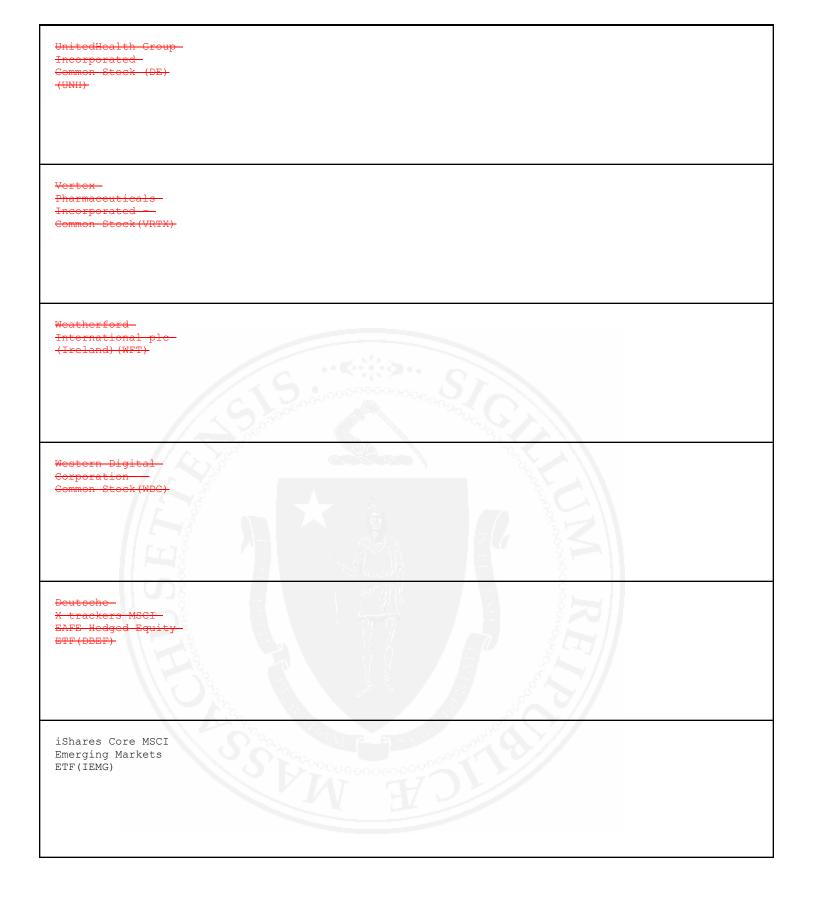
Amendment Page 13 of 36



Amendment Page 14 of 36

SanDisk— Corporation—
Common Stock (SNDK)
Seagate -
Technology. Common Stock(STX)
COMMINDA STOCK(STX)
Starz - Series A
Common Stock (STRZA)
10000000000000000000000000000000000000
TE Connectivity - Ltd. New
Switzerland Registered Shares(TEL)
Twitter, Inc. Common Stock(TWTR)
Tyco International
plc (Ireland)
Ordinary Share (TYC)

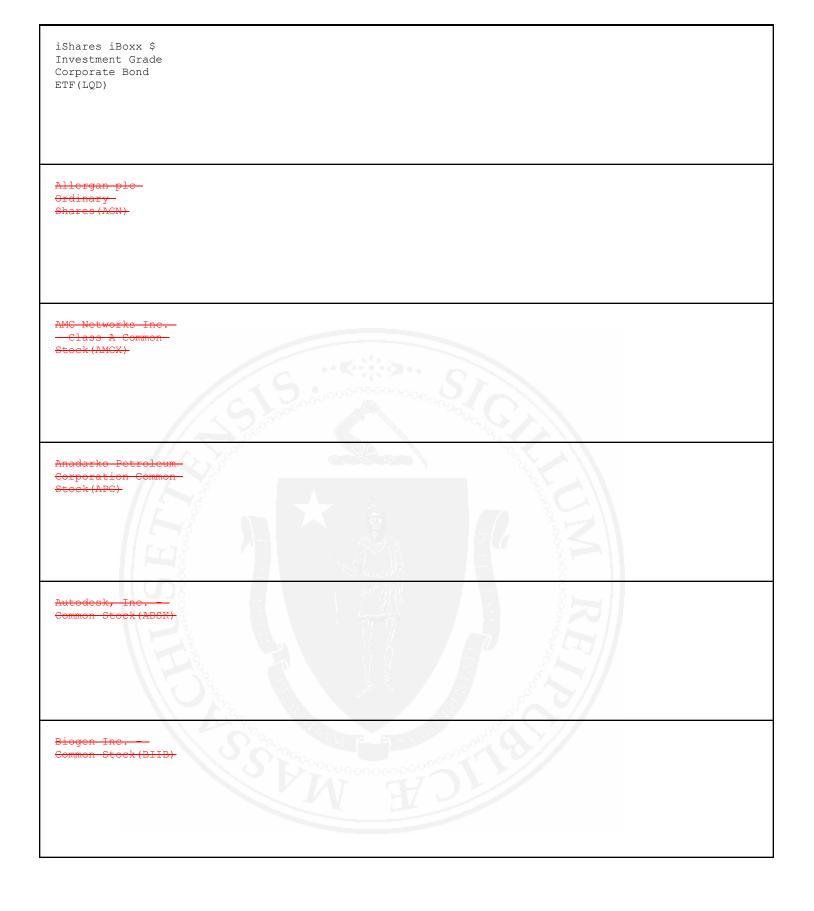
Amendment Page 15 of 36



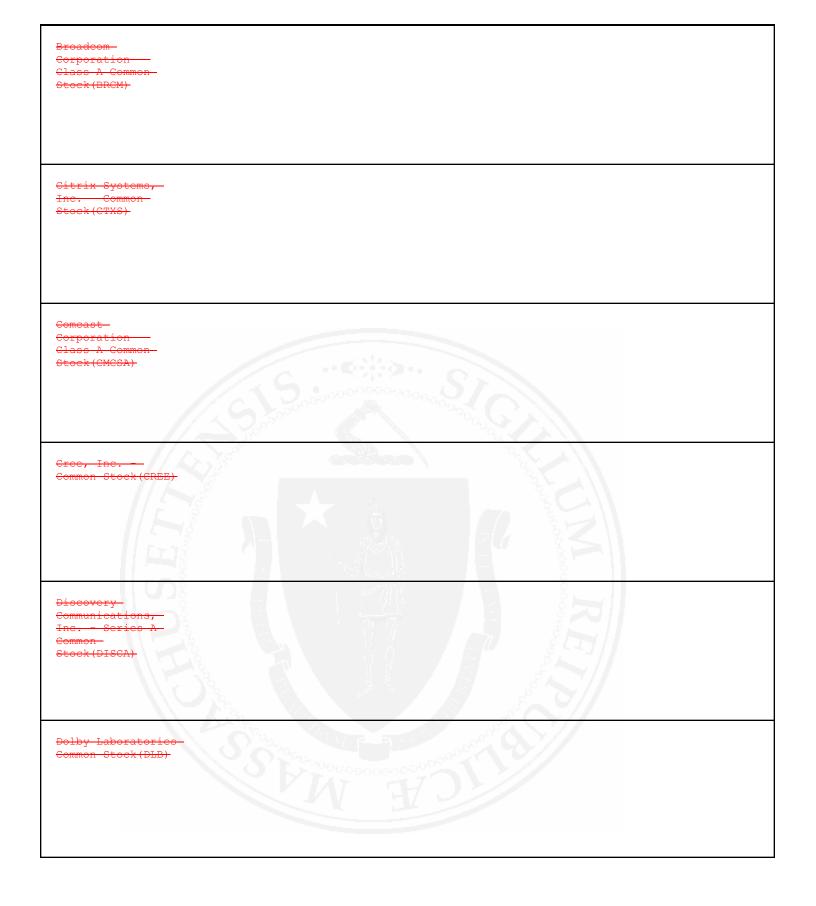
Amendment Page 16 of 36

Vanguard Value ETF— — DNQ(VTV)
Vanguard Small-Cap Value ETF DNQ(VBR)
Vanguard Crowth ETF DNQ (VUG)
Vanguard Mid-Cap Growth ETF DNQ (VOT)
WisdomTree Japan Hedged Equity Fund (DXJ)
WisdomTree Europe Hedged Equity Fund (HEDJ)

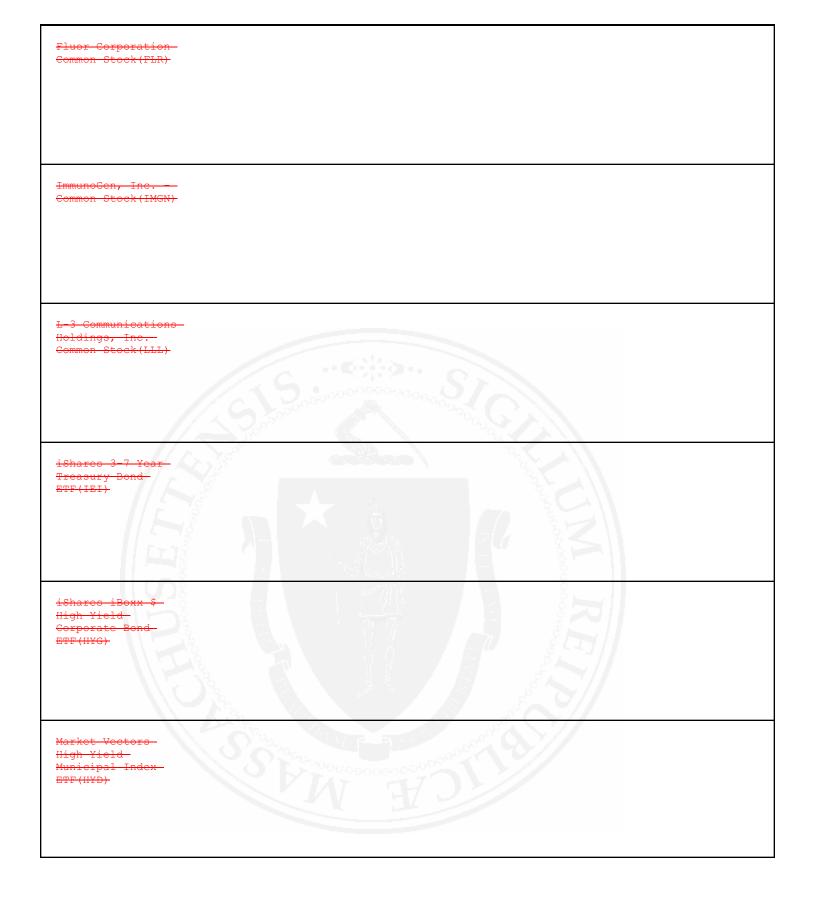
Amendment Page 17 of 36



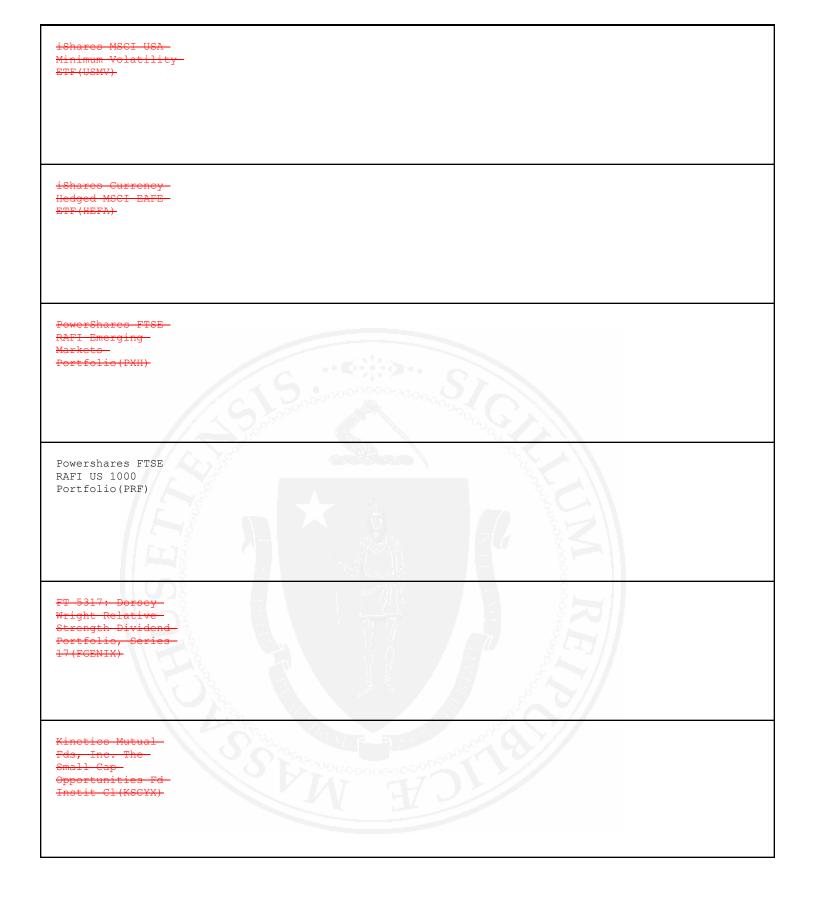
Amendment Page 18 of 36



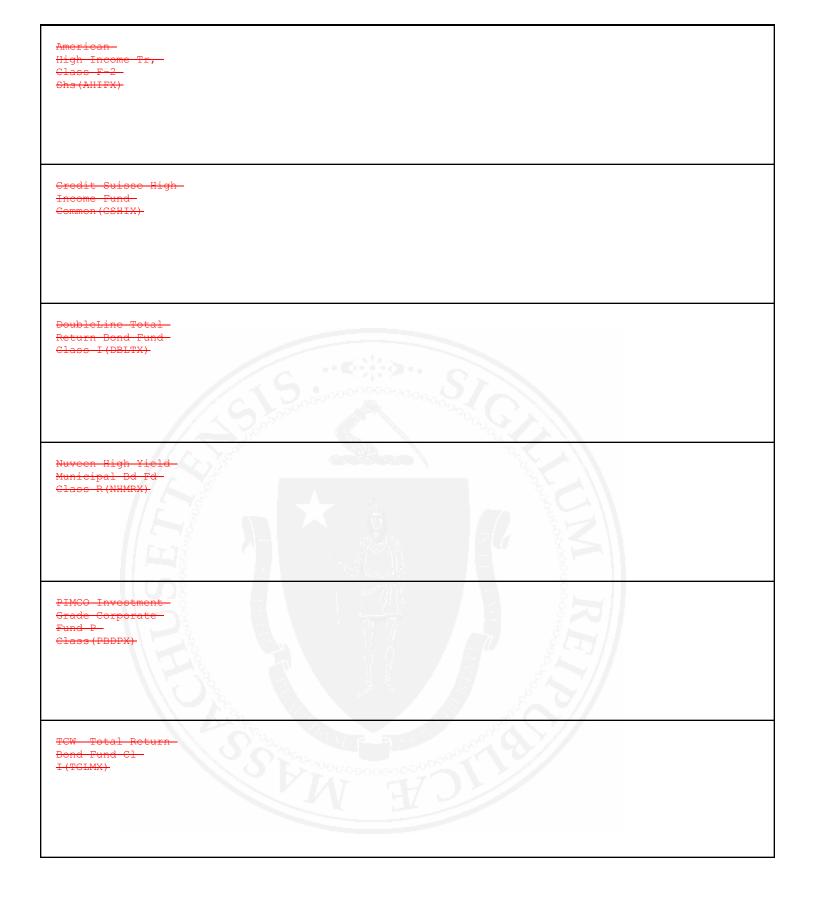
Amendment Page 19 of 36



Amendment Page 20 of 36



Amendment Page 21 of 36



Amendment Page 22 of 36

IVA Worldwide Fund PowerShares FTSE RAFI Developed Markets ex-U.S. Portfolio(PXF) PowerShares FTSE RAFI Emerging Markets Portfolio(PXH) Vanguard REIT DNQ (VNQ)

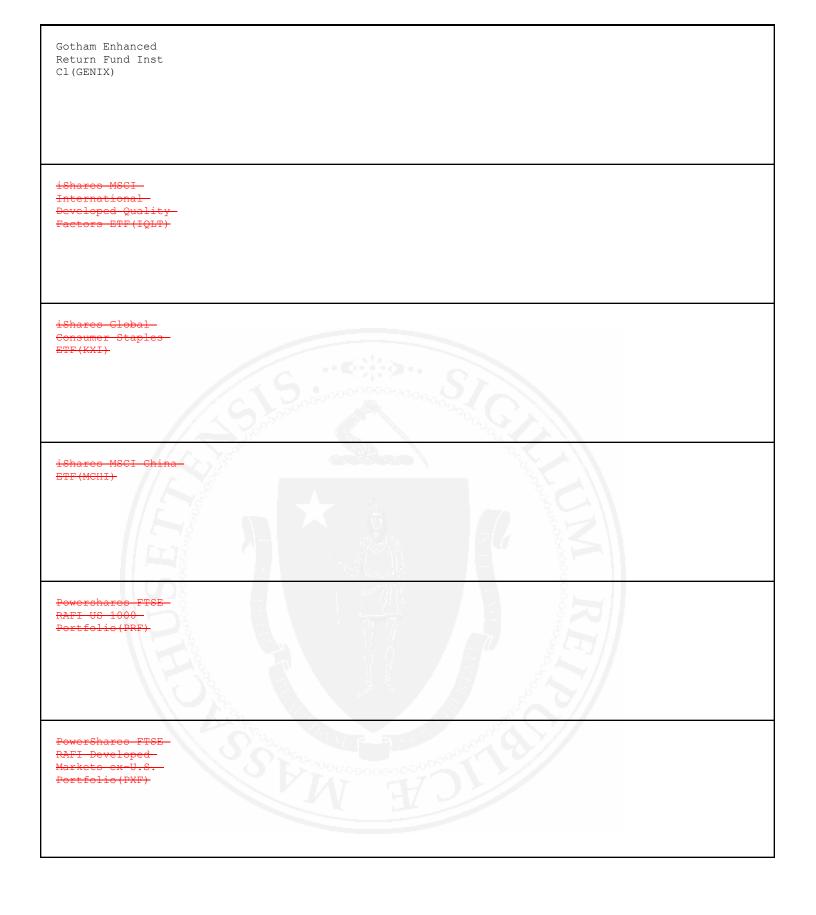
Amendment Page 23 of 36

BlackRock Global Alloc A (MDLOX) FPA Funds Trust, FPA Crescent Portfolio Institutional Class(FPACX) iShares Core Growth Allocation ETF (AOR)

Amendment Page 24 of 36

BlackRock Global Alloc A(MDLOX) Florida 1501 Yamato Road, Boca Common Stock Freeport-McMoRan, California DFA T.A. U.S. Core Equity 2 Portfolio(DFTCX) DFA T.A.World ex U.S. Core Equity Portfolio(DFTWX)

Amendment Page 25 of 36



Amendment Page 26 of 36

PowerShares FTSE Portfolio (PXII) SPDR Select Sector Fund - Health Care(XLV) York, NY, 10022, US SPDR Select Sector Fund - Consumer Discretionary(XLY) SPDR Select Sector Fund - Energy Select Sector(XLE)

Amendment Page 27 of 36

Vanguard Information Tech ETF - DNQ(VGT)			
Vanguard Materials ETF - DNQ(VAW)	_		
Vanguard Total World Stock Fund (VT)	Mutual Fund	Pennsylvania Pennsylvania	P.O. Box 1110, Valley Forge, PA, 19482, US
Ishares Core US Aggregate Bond Fund (AGG)	<u>Bond</u>	California	400 Howard St, San Francisco, CA, 94105, US
Aggregate Bond	Bond	California	400 Howard St, San Francisco, CA, 94105, US

Amendment Page 28 of 36

Guggenheim Total Return Bond Fund-Institutional Class(GIBIX) Nuveen Short Duration High Yield Municipal Bond Fd Cl I(NVHIX) AQR Managed Futures Strategy Fund Class I(AQMIX) AQR Style Premia Alternative Fund Class I (QSPIX) Catalyst/Millburn Mutual Fund New York 36 N New York Avenue, Hedge Fund (MBXIX) Floor 3, Huntington, NY, 11743, US Nuveen Equity Long/Short Fund CLASS I (NELIX)

Amendment Page 29 of 36

ishares Gold Trust(IAU)			
State of California	<u>Bond</u>	<u>California</u>	1315 10th St , Sacramento, CA, 05814, US
New York State Dorm Auth	Bond	New York	State St. and Washington Ave, Albany, NY, 12224, US
Maryland State Issue D	Bond	Maryland	100 State Circle, Annapolis, MD, 21401, US
Pennsylvania State	Bond	Pennsylvania	Commonwealth Avenue, Harrisburg, PA, 17025, US
Oklahoma Water Resources	Bond	Oklahoma	3800 N Classen Blvd, Oklahoma City, OK, 73118, US

Amendment Page 30 of 36

Austin Texas Public Impt	Bond	<u>Texas</u>	1100 Congress Ave, Austin, TX, 73301, US
US Treasury Note 2022	<u>Bond</u>	Washington, DC	1500 Pennsylvania Ave NW, Washington, DC, 20220, US
San Antonio TX Water System	Bond	<u>Texas</u>	1100 Congress Ave, Austin, TX, 73301, US
Ohio State Water Dev Auth	Bond	Ohio	1 Capitol Square, Columbus, OH, 43215, US
US Treasury Note 2028	Bond	Washington, DC	1500 Pennsylvania Ave NW, Washington, DC, 20220, US
O7 Identify avenu Financia	al Investment that was award as of De	ecember 31, 2018, by a Trust of whic	h vou were a

27. Identify every Financial Investment that was owned as of December 31, 2018, by a Trust of which you were a beneficiary, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each. For any Financial Investment not included on the drop-down list of publicly traded stock, you must provide the issuer's principal place of business or state of incorporation as well as its address.

Beneficiary Legend: Filer = F Spouse/Child(ren) = S/C Trust = T

Filer reported none.

Amendment Page 31 of 36

28. Other than the Financial Investments identified in Question 27, identify every Financial Investment that was owned as of December 31, 2018, by a Trust of which your spouse and/or any dependent child(ren) residing in your household was a beneficiary, and which had a fair market value as of that date greater than \$1,000, and provide the required information for each. For any Financial Investment not included on the drop-down list of publicly traded stock, you must provide the issuer's principal place of business or state of incorporation as well as its address.

Filer reported none.

<u>NOTE</u>: If the Filer answered "YES" to a Question in the following section, one or more columns in the Table for that Question may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a family member's name or address, the Filer was not required to provide that name. If the Filer indicated that an address was a family member's address, the Filer was not required to provide that address.

Debts and Mortgages

29. Identify all mortgages, including home equity and reverse mortgage loans, on your Primary Residence, on which more than \$1,000 was owed as of December 31, 2018, where the creditor (person who loaned you the money) is <u>not</u>, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.

Creditor Name	Creditor Address	Mortgage Term	Interest Rate (%)	Termination Year
Greenfield Cooperative Bank	63 Federal Street, Greenfield, MA, 01301, US	15 years	4	2025

30. Did you have a mortgage, including a home equity or reverse mortgage loan, on any property <u>OTHER</u> than your Primary Residence, on which more than \$1,000 was owed as of December 31, 2018, which you were obligated to pay and where the creditor (person who loaned you the money) is <u>NOT</u>, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative?

Obligor Legend: Filer = F Spouse/Child(ren) = S/C Trust = T

Filer reported none.

Amendment Page 32 of 36

Reside 31, 20 where is <u>not</u> ,	31. Identify all mortgages, including home equity and reverse mortgage loans, other than any mortgage on your Primary Residence or any mortgage identified in response to Question 30, on which more than \$1,000 was owed as of December 31, 2018, and which your spouse and/or any dependent child(ren) residing in your household were obligated to pay and where the creditor (person who loaned the money to your spouse and/or dependent child(ren) residing in your household) is not, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.			
	Filer reported none.			
you ov great-	entify all non-mortgage debts of more than \$1,000 that you owed as of December 31, 2018, IF the person to whom wed the debt is <u>not</u> , by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required ation for each.			
	Filer reported none.			
your h residin grando	entify all non-mortgage debts of more than \$1,000 that your spouse and/or any dependent child(ren) residing in ousehold owed as of December 31, 2018, if the person to whom your spouse and/or any dependent child(ren) ag in your household owed the debt is <u>not</u> , by blood or marriage, your parent, grandparent, great grandparent, child, child, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide quired information for each.			
	Filer reported none.			
34. Identify non-mortgage debts of more than \$1,000 which you owed and which were forgiven at any time during 2018, excluding debts forgiven by a person who is, by blood or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, brother, niece, nephew, or the spouse of any such relative, and provide the required information for each.				
	Filer reported none.			

Amendment Page 33 of 36

residin	entify non-mortgage debts of more than \$1,000 that were owed by your spouse and/or any dependent child(ren) ng in your household and were forgiven at any time during 2018, excluding debts forgiven by a person who is, by or marriage, your parent, grandparent, great grandparent, child, grandchild, great-grandchild, aunt, uncle, sister, er, niece, nephew, or the spouse of any such relative, and provide the required information for each.	
	Filer reported none.	
Reim	bursments, Gifts, and Honoraria	
	entify any Reimbursements for expenses in excess of \$100 provided to you at any time during 2018 by any ative agent or executive agent (lobbyist).	
	Filer reported none.	
36, yo	dentify any Reimbursements for expenses in excess of \$100, other than those identified in response to Question ou received at any time during 2018 from any person having a direct interest in legislation, legislative action, or a reference a governmental body.	
	Filer reported none.	
	entify any Reimbursements for expenses in excess of \$100 provided to your spouse and/or any dependent ren) residing in your household at any time during 2018 by any legislative agent or executive agent (lobbyist).	
	Filer reported none.	

Amendment Page 34 of 36

37.a Identify any Reimbursements for expenses in excess of \$100, other than those identified in response to Question 37, provided to your spouse and/or dependent child(ren) residing in your household at any time during 2018 by any person having a direct interest in legislation, legislative action, or a matter before a governmental body.			
	Filer reported none.		
	entify any Gifts and/or Honoraria worth more than \$100 provided to you at any time during 2018 by any person g a direct interest in legislation, legislative action, or a matter before a governmental body.		
	Filer reported none.		
residir	entify any Gifts and/or Honoraria worth more than \$100 provided to your spouse and/or any dependent child(ren) ng in your household at any time during 2018 by any person having a direct interest in legislation, legislative action, natter before a governmental body.		
	Filer reported none.		
Quest family	E: If the Filer answered "YES" to a Question in the following section, one or more columns in the Table for that tion may be blank in the following situations: If the Filer indicated that the name of the person and/or the trust was a member's name or address, the Filer was not required to provide that name. If the Filer indicated that an address a family member's address, the Filer was not required to provide that address.		
Blin	nd Trusts		
	Did you, your spouse and/or any dependent child(ren) residing in your household during 2018, own anything that you e not reported on this Statement of Financial Interests because it was held in a Blind Trust during 2018?		
	Filer reported none.		

Amendment Page 35 of 36



I, Natalie Blais, certify under the pains and penalties of perjury that:

I made a diligent effort to obtain the required information concerning myself and my spouse and/or any dependent child(ren); and

The information provided on this form is true and complete, to the best of my knowledge.

Submitted: 07/26/2019

Did your spouse and/or any dependent child(ren) residing in your household decline to disclose information which is necessary to complete this form fully and accurately?

The following are the specific Question(s) which I decline to answer in whole or in part because I assert that the information is privileged by law:

Please explain the basis of your claim of privilege:

IMPORTANT:

- 1. No DESIGNATED PUBLIC EMPLOYEE shall be allowed to continue in their duties or to receive compensation from public funds unless they have filed a Statement of Financial Interests with the State Ethics Commission.
- 2. The State Ethics Commission does not accept a faxed or emailed copy of a Statement of Financial Interests for filing.
- 3. If you were required to amend your Statement of Financial Interests last year, we encourage you to carefully review your 2018 filling before submitting.

Amendment Page 36 of 36