

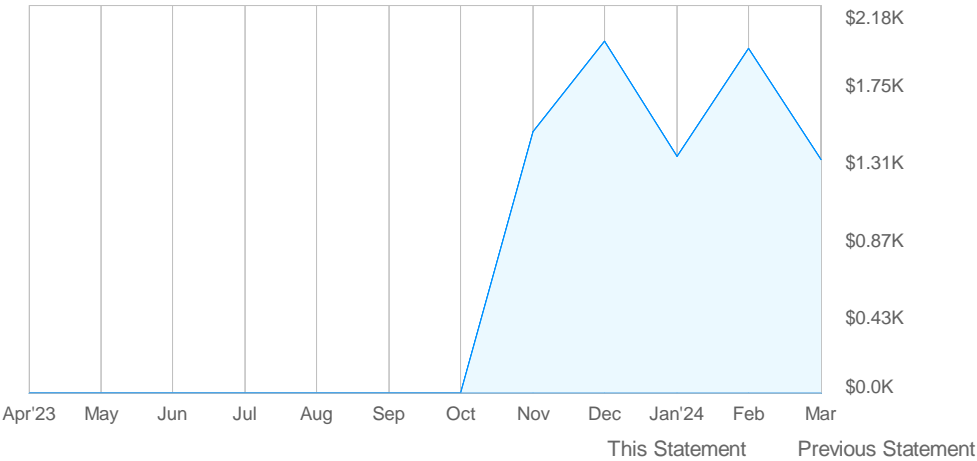


Roth Contributory IRA of
MICHAEL BRYAN STRAIN
CHARLES SCHWAB & CO INC CUST
ROTH CONTRIBUTORY IRA

Account Number Statement Period
March 1-31, 2024

Account Summary

Ending Account Value as of 03/31	Beginning Account Value as of 03/01
\$1,316.16	\$1,951.35



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Online Assistance

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Visit schwab.com/stmt to explore the features and benefits of this statement.

Beginning Value	\$1,951.35	\$1,335.33
Deposits	0.00	0.00
Withdrawals	0.00	0.00
Dividends and Interest	0.29	0.37
Transfer of Securities	0.00	0.00
Market Appreciation/(Depreciation)	(635.48)	615.65
Expenses	0.00	0.00

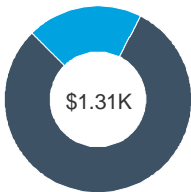
Ending Value	\$1,316.16	\$1,951.35
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Account Ending Value reflects the market value of your cash and investments. It does not include pending transactions, unpriced securities or assets held outside Schwab's custody.



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Asset Allocation



Investment Objective:
Growth

Top Account Holdings This Period

SYMBOL CUSIP	Description	Market Value	% of Accounts
LOGI	CALL LOGITECH INTL S A	317.75	24%
	TD BANK USA NA	267.00	20%
ADNT	PUT ADIENT PLC	240.81	18%
LOGI	PUT LOGITECH INTL S A	105.00	8%
UPBD	CALL UPBOUND GROUP INC	82.50	6%

Gain or (Loss) Summary

	All Positions		Net
	Gain	(Loss)	
This Period	149.97	(157.66)	(7.69)
YTD	500.70	0.00	500.70
Unrealized			(\$733.53)

Values may not reflect all of your gains/losses; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases. Please login to your account at Schwab.com for real-time gain/loss information. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.

Statement Period
March 1-31, 2024

Income Summary



	This Period	YTD
Bank Sweep Interest	0.29	0.91
Total Income	\$0.29	\$0.91

Margin Information

The opening settled debit balance in this limited margin account for the statement period was \$0.00. Your account had the following settled debit activity during the margin period. **No interest was charged.**

Date Range	Settled Debit Balance Amount
03/19 - 03/19	(\$3,867.31)

The interest period does not correspond to the statement period. Retain this statement for use in conjunction with the next statement. \$0.00 based on 0.00% margin interest rate charged on daily margin balances. No margin interest was charged. This equates to 0.00% annual interest rate.

Retirement Details

Contributions	2023	2024
Total YTD (\$)	0.00	0.00



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A Message About Your Account

T plus one settlement starts May 28, 2024

Trades executed on or after May 28, 2024 will now settle on the next business day. For more information, please visit schwab.com/T1. 0324-40HF

Positions - Summary

Beginning Value as of 03/01	+	Transfer of Securities(In/Out)	+	Dividends Reinvested	+	Cash Activity	+	Change in Market Value	=	Ending Value as of 03/31	Cost Basis	Unrealized Gain/(Loss)
\$1,951.35		\$0.00		\$0.00		\$0.29		(\$635.48)		\$1,316.16	\$1,782.69	(\$733.53)

Values may not reflect all of your gains/losses; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.

Cash and Cash Investments

Type	Symbol	Description	Quantity	Price(\$)	Beginning Balance(\$)	Ending Balance(\$)	Change in Period Balance(\$)	Pending/Unsettled Cash(\$)	Interest/ Yield Rate	% of Acct
Bank Sweep		TD BANK USA NA ^{X,Z}			845.36	267.00	(578.36)		0.45%	20%
Total Cash and Cash Investments					\$845.36	\$267.00	(\$578.36)			20%

Positions - Options

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
ADNT 04/19/20 24 35.00 C	CALL ADIENT PLC \$35 EXP 04/19/24	1.0000	0.42500	42.50	145.66	(103.16)			3%
VIX 05/22/20 24 47.50 C	CALL CBOE VOLATILITY IDX \$47.5 EXP 05/22/24	1.0000	0.14060	14.06	40.77	(26.71)			1%
GEN 04/19/20 24 22.00 C	CALL GEN DIGITAL INC \$22 EXP 04/19/24	1.0000	0.75170	75.17	43.66	31.51			6%



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Positions - Options (continued)

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
LOGI 04/19/20 24 87.50 C	CALL LOGITECH INTL S A \$87.5 EXP 04/19/24	1.0000	3.17750	317.75	279.66	38.09			24%
PLTR 04/19/20 24 27.00 C	CALL PALANTIR TECHNOLOGI \$27 EXP 04/19/24	1.0000	0.14500	14.50	215.66	(201.16)			1%
STNE 04/19/20 24 17.00 C	CALL STONECO LTD \$17 EXP 04/19/24	1.0000	0.45000	45.00	50.66	(5.66)			3%
UPBD 04/19/20 24 35.00 C	CALL UPBOUND GROUP INC \$35 EXP 04/19/24	1.0000	0.82500	82.50	30.66	51.84			6%
ADNT 04/19/20 24 35.00 P	PUT ADIENT PLC \$35 EXP 04/19/24	1.0000	2.40810	240.81	220.66	20.15			18%
GEN 04/19/20 24 22.00 P	PUT GEN DIGITAL INC \$22 EXP 04/19/24	1.0000	0.30000	30.00	94.66	(64.66)			2%
LOGI 04/19/20 24 87.50 P	PUT LOGITECH INTL S A \$87.5 EXP 04/19/24	1.0000	1.05000	105.00	360.66	(255.66)			8%
PLTR 04/19/20 24 16.00 P	PUT PALANTIR TECHNOLOGIE \$16 EXP 04/19/24	1.0000	0.02510	2.51	153.66	(151.15)			<1%
STNE 04/19/20 24 17.00 P	PUT STONECO LTD \$17 EXP 04/19/24	1.0000	0.78750	78.75	110.66	(31.91)			6%



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Positions - Options (continued)

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
UPBD 04/19/2024 30.00 P	PUT UPBOUND GROUP INC \$30 EXP 04/19/24	1.0000	0.00610	0.61	35.66	(35.05)			<1%
Total Options				\$1,049.16	\$1,782.69	(\$733.53)		\$0.00	80%

Option Customers: Be aware of the following: 1) Commissions and other charges related to the execution of option transactions have been included in confirmations of such transactions previously furnished to you and will be made available promptly upon request 2) You should advise us promptly of any material changes in your investment objectives or financial situation 3) Exercise assignment notices for the option contracts are allocated among customer short positions pursuant to an automated procedure which randomly selects from among all customer short option positions those contracts which are subject to exercise, including positions established on the day of assignment 4) Realized gain/loss of underlying securities is adjusted to reflect the premiums of assigned or exercised options. Please consult your tax advisor or IRS publication 550, Investment Income and Expenses, for additional information on Options.

Estimated Annual Income ("EAI") and Estimated Yield ("EY") calculations are for informational purposes only. The actual income and yield might be lower or higher than the estimated amounts. EY is based upon EAI and the current price of the security and will fluctuate. For certain types of securities, the calculations could include a return of principal or capital gains in which case EAI and EY would be overstated. EY and EAI are not promptly updated to reflect when an issuer has missed a regular payment or announced changes to future payments, in which case EAI and EY will continue to display at a prior rate.

Transactions - Summary

Beginning Cash* as of 03/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Expenses	=	Ending Cash* as of 03/31
\$845.36		\$0.00		\$0.00		(\$5,321.94)		\$4,743.29		\$0.29		\$0.00		\$267.00
Other Activity		\$0.00	Other activity includes transactions which don't affect the cash balance such as stock transfers, splits, etc.											

*Cash (includes any cash debit balance) held in your account plus the value of any cash invested in a sweep money fund.

Transaction Details

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
03/06	Purchase		LOGI 04/19/2024 87.50 C	CALL LOGITECH INTL S A \$87.5 EXP 04/19/24 Commission \$0.65; Exchange Processing Fee \$0.01	1.0000	2.7900	0.66	(279.66)	
	Purchase		LOGI 04/19/2024 87.50 P	PUT LOGITECH INTL S A \$87.5 EXP 04/19/24 Commission \$0.65; Exchange Processing Fee \$0.01	1.0000	3.6000	0.66	(360.66)	
03/08	Sale		PLTR 04/19/2024 24.00 C	CALL PALANTIR TECHNOLOGI\$24 EXP 04/19/24 Commission \$0.65; Exchange Processing Fee \$0.01	(1.0000)	3.8200	0.66	381.34	98.68 ^(LT)



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Transaction Details (continued)

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
03/08	Purchase		PLTR 04/19/2024 27.00 C	CALL PALANTIR TECHNOLOGI\$27 EXP 04/19/24 Commission \$0.65; Exchange Processing Fee \$0.01	1.0000	2.1500	0.66	(215.66)	
03/18	Purchase		GEN 04/19/2024 22.00 C	CALL GEN DIGITAL INC \$22 EXP 04/19/24 Commission \$0.65; Exchange Processing Fee \$0.01	1.0000	0.4300	0.66	(43.66)	
	Purchase		GEN 04/19/2024 22.00 P	PUT GEN DIGITAL INC \$22 EXP 04/19/24 Commission \$0.65; Exchange Processing Fee \$0.01	1.0000	0.9400	0.66	(94.66)	
	Other Activity	Exercise Short	UAL 03/15/2024 41.00 C	CALL UNITED AIRLINES HLD\$41 EXP 03/15/24	(1.0000)				
	Other Activity	Expired Short	UAL 03/15/2024 41.00 P	PUT UNITED AIRLINES HLDG\$41 EXP 03/15/24	(1.0000)				
	Interest	Bank Interest ^{X,Z}		BANK INT 021624-031524				0.29	
03/19	Purchase		UAL	UNITED AIRLINES HLDGS	100.0000	41.0000		(4,100.00)	
03/20	Sale		UAL	UNITED AIRLINES HLDGS Exchange Processing Fee \$0.05	(100.0000)	43.6200	0.05	4,361.95	51.29 ^(LT)
	Purchase		UPBD 04/19/2024 35.00 C	CALL UPBOUND GROUP INC \$35 EXP 04/19/24 Commission \$0.65; Exchange Processing Fee \$0.01	1.0000	0.3000	0.66	(30.66)	
	Purchase		UPBD 04/19/2024 30.00 P	PUT UPBOUND GROUP INC \$30 EXP 04/19/24 Commission \$0.65; Exchange Processing Fee \$0.01	1.0000	0.3500	0.66	(35.66)	
03/25	Purchase		STNE 04/19/2024 17.00 C	CALL STONECO LTD \$17 EXP 04/19/24 Commission \$0.65; Exchange Processing Fee \$0.01	1.0000	0.5000	0.66	(50.66)	
	Purchase		STNE 04/19/2024 17.00 P	PUT STONECO LTD \$17 EXP 04/19/24 Commission \$0.65; Exchange Processing Fee \$0.01	1.0000	1.1000	0.66	(110.66)	
Total Transactions								(\$578.36)	\$149.97

Date column represents the Settlement/Process date for each transaction.



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Bank Sweep Activity

Date	Description	Amount
03/01	Beginning Balance ^{x,z}	\$845.36
03/06	BANK TRANSFER TO BROKERAGE	(640.32)
03/08	BANK CREDIT FROM BROKERAGE ^x	165.68
03/15	BANK INTEREST - TD BANK USA NA ^{x,z}	0.29
03/18	BANK TRANSFER TO BROKERAGE	(138.32)

* Your interest period was 02/16/24 - 03/15/24. ^z

Date	Description	Amount
03/19	BANK TRANSFER TO BROKERAGE	(232.69)
03/20	BANK CREDIT FROM BROKERAGE ^x	428.32
03/25	BANK TRANSFER TO BROKERAGE	(161.32)
03/31	Ending Balance ^{x,z}	\$267.00
03/28	Interest Rate ^{* z}	0.45%

Endnotes For Your Account

^x Bank Sweep deposits are held at FDIC-insured Program Banks, which are listed in the Cash Features Disclosure Statement.

^z For the Bank Sweep and Bank Sweep for Benefit Plans features, interest is paid for a period that differs from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period.

Terms and Conditions

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disclosures about the bank sweep feature(s) in your Account(s), please refer to the Cash Features Disclosure Statement available online or from a Schwab representative. **Cash:** Any Free Credit Balance owed by us to you payable upon demand which, although accounted for on our books of record, is not segregated and may be used in the conduct of this firm's business. **Dividend Reinvestment Customers:** Dividend reinvestment transactions were effected by Schwab acting as a principal for its own account, except for the reinvestment of Schwab dividends, for which an independent broker-dealer acted as the buying agent. Further information on these transactions will be furnished upon written request. **Gain (or Loss):** Unrealized Gain or (Loss) and Realized Gain or (Loss) sections ("Gain/Loss Section(s)") contain a gain or a loss summary of your Account. This information has been provided on this statement at the request of your Advisor, if applicable. This information is not a solicitation or a recommendation to buy or sell. **Schwab does not provide tax advice and encourages you to consult with your tax professional. Please view the Cost Basis Disclosure Statement for additional information on how gain (or loss) is calculated and how Schwab reports adjusted cost basis information to the IRS.** **Interest:** For the Schwab One Interest, Bank Sweep, and Bank Sweep for Benefit Plans features, interest is paid for a period that may differ from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period. For the Schwab One Interest feature, interest accrues daily from the second-to-last business day of the prior month and is posted on the second-to-last business day of the current month. For the Bank Sweep and Bank Sweep for Benefit Plans features, interest accrues daily from the 16th day of the prior month and is credited/posted on the first business day after the 15th of the current



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Statement Period

March 1-31, 2024

Terms and Conditions (continued)

month. If, on any given day, the interest that Schwab calculates for the Free Credit Balances in the Schwab One Interest feature in your brokerage Account is less than \$.005, you will not accrue any interest on that day. For balances held at banks affiliated with Schwab in the Bank Sweep and Bank Sweep for Benefit Plans features, interest will accrue even if the amount is less than \$.005. **Margin Account Customers:** This is a combined statement of your margin account and special memorandum account maintained for you under Section 220.5 of Regulation T issued by the Board of Governors of the Federal Reserve System. The permanent record of the separate account as required by Regulation T is available for your inspection. Securities purchased on margin are Schwab's collateral for the loan to you. It is important that you fully understand the risks involved in trading securities on margin. These risks include: 1) You can lose more funds than you deposit in the margin account; 2) Schwab can force the sale of securities or other assets in any of your account(s) to maintain the required account equity without contacting you; 3) You are not entitled to choose which assets are liquidated nor are you entitled to an extension of time on a margin call; 4) Schwab can increase its "house" maintenance margin requirements at any time without advance written notice to you. **Market Price:** The most recent price evaluation available to Schwab on the last business day of the report period, normally the last trade price or bid as of market close. Unpriced securities denote that no market evaluation update is currently available. Price evaluations are obtained from outside parties. Schwab shall have no responsibility for the accuracy or timeliness of any such valuations. Assets Not Held at Schwab are not held in your Account or covered by the Account's SIPC account protection and are not otherwise in Schwab's custody and are being provided as a courtesy to you. Information on Assets Not Held at Schwab, including but not limited to valuations, is reported solely based on information you provide to Schwab. Schwab can neither validate nor certify the existence of Assets Not Held at Schwab or the accuracy, completeness or timeliness of the information about Assets Not Held at Schwab, whether provided by you or otherwise. Descriptions of Assets Not Held at Schwab may be abbreviated or truncated. Some securities, especially thinly traded equities in the OTC market or foreign markets, may not report the most current price and are indicated as Stale Priced. Certain Limited Partnerships (direct participation programs) and unlisted Real Estate Investment Trust (REIT) securities, for which you may see a value on your monthly Account statement that reflects the issuer's appraised estimated value, are not listed on a national securities exchange, and are generally illiquid. Even if you are able to sell such securities, the price received may be less than the per share appraised estimated value provided in the account statement. **Market Value:** The Market Value is computed by multiplying the Market Price by the Quantity of Shares. This is the dollar value of your present holdings in your specified Schwab Account or a summary of the Market Value summed over multiple accounts. **Non-Publicly Traded Securities:** All assets shown on this statement, other than certain direct investments which may be held by a third party, are held in your Account. Values of certain Non-Publicly Traded Securities may be furnished by a third party as provided by Schwab's Account Agreement. Schwab shall have no responsibility for the accuracy or timeliness of such valuations. The Securities Investor Protection Corporation (SIPC) does not cover many limited partnership interests. **Schwab Sweep Money Funds:** Includes the primary money market funds into which Free Credit Balances may be automatically invested pursuant to your Account Agreement. Schwab or an affiliate acts and receives compensation as the Investment Advisor, Shareholder Service Agent and Distributor for the Schwab Sweep

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