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Financial Disclosures or Conflict of Interest Form.

Candidate/Officeholder:

Marlo M Oaks

Office

State Treasurer

Item 1A

The name(s) and address(es) of each of the individual's current employer(s) and name(s) and address(es) of each of the individual's preceding year.

Current Employer(s):

State of Utah
350 N State Street, Suite 180
Salt Lake City, UT 84114

Previous Employer(s):

None

Item 1B

For each employer described in Item 1A, a brief description of the employment, including the individual's occupation, and, as applicable

Current Employment:

State Treasurer
Utah Office of State Treasurer
Chief Investment Officer and Chief Banking Officer for the State of Utah

Previous Employment:

N/A

Item 2A

The name of any entity* in which the individual is an owner or officer, or was an owner or officer during the preceding year.

Kaizen Energy Partners LLC

Item 2B

A brief description of the type of business or activity conducted by the entity(ies) described in Item 2A

The company finds co-gen or onsite utility power generation projects designed to reduce energy costs, improve a nergy redundancy as needed, reduce harmful air contaminants, and provide more dependable power.

Item 2C

Individual's position in the entity(ies) described in Item 2A

I founded this business and brought in partners in 2018. I am a 10% owner now and not involved in the day-to-da

Item 3A

The name of each individual from whom, or entity from which, the individual has received \$5,000 or more in income during the prece

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Starlion, Inc.

Item 3B

A brief description of the type of business or activity conducted by the individual or entity described in Item 3A.**

Starlion, Inc. is a start-up creating a secure financial transactions platform.

Item 4A

The name of each entity in which the individual holds any stocks or bonds having a fair market value of \$5,000 or more as of the date of the disclosure form or during the preceding year (excluding funds that are managed by a third party, including blind trusts, managed investment accounts, and mutual funds).

Casual Restaurants, Inc.
Clene, Inc.
Curza Global, Inc.
IX3
Soar, Inc.
Starlion, Inc.

Item 4B

A brief description of the type of business or activity conducted by the entity(ies) described in Item 4A.

Casual Restaurants, Inc.: operates casual dining restaurants in Greater China
Clene, Inc.: biopharma company
Curza Global, Inc.: pre-clinical trial biopharma company
IX3 International, Inc.: water treatment technology for agricultural applications
Soar, Inc.: technology company cataloging seminars, talks, and other knowledge
Starlion, Inc. is a start-up creating a secure financial transactions platform.

Item 5A

The name of each entity or organization not described in Items 2A through 4B of this form in which the individual currently serves, or served in the preceding year, on the board of directors or in any other type of paid leadership capacity.

None

Item 5B

A brief description of the type of business or activity conducted by the entity(ies) or organization(s) described in Item 5A

None

Item 5C

Description of the type of advisory position held by the individual within the entity(ies) organization(s) described in Item 5A.

None

Item 6A (Optional)

Description of any real property in which the individual holds an ownership or other financial interest that the individual believes may constitute a conflict of interest.

Item 6B (Optional)

Description of type of interest held by the individual in the property(ies) described in Item 6A.

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Item 7A

The name(s) of the individual's spouse and any other adult residing in the individual's household who is not related by blood or marriage, as applicable.

Spouse:

Elaine Oaks

Other Adults:

None

Item 7B

For the individual's spouse, the name(s) and address(es) of each current employer(s) and name(s) and address(es) of each employer(s) during the preceding year.

Spouse's Current Employer(s):

None

Spouse's Previous Employer(s):

None

Item 7C

A brief description of the employment and occupation of each adult who resides in the individual's household and is not related to the individual by blood or marriage.

None

Item 8A (Optional)

A description of any other matter or interest that the individual believes may constitute a conflict of interest.

I, the regulated officeholder or candidate, believe this form is true and accurate to the best of my knowledge.

Candidate/Officeholder's Electronic Signature

Mario M. Oaks

Governor
Lt. Governor
Elections
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