



Statement of Financial Interest

City of Boston

Name: Melissa Carlson

Street Address: 681 Massachusetts Ave
#5

City: Boston

State: Massachusetts

Zip: 02118

Phone Number: 1-617-501 1638

Phone Type: Mobile

Work Email:

melissa.carlson@boston.gov

Submission Date: 2025-07-08

Did you have a spouse/partner residing in your household at any time during 2024?

Yes

Spouse Full Name: Mike Dalton

Employment Information

Are you a candidate for public office? No

Name of Office:

Did you hold a position as a public official or designated public employee in 2024? Yes

<i>Agency in which you served</i>	<i>Your job title</i>	<i>Start date</i>	<i>End date</i>	<i>Amount of income earned from this position in 2024</i>
Boston Age Strong Commission	Senior Director of Programs and Partnerships	2025-07-01		\$100,001 or more

Have you or your spouse/partner held a government position in any federal, state, county, district, or municipal agency? This includes full-time, part-time, and consulting positions, whether they were paid or unpaid. Yes



<i>Who held the position?</i>	<i>What was the name of the of Government entity?</i>	<i>What was the job title?</i>	<i>If you held the position, how much money did you make?</i>
Me	City of Boston	Senior Director of Programs and Partnerships	\$100,001 or more

Were you or your spouse/partner associated with a business as an employee, partner, sole proprietor, officer, director, or any similar capacity? This includes full-time and part-time positions, whether they were paid or unpaid. Yes

<i>Who held the position?</i>	<i>What was the job title?</i>	<i>What was the name of the business?</i>	<i>Business Address</i>	<i>If you held the position, how much money did you make?</i>
Spouse/Partner	Business Initiatives Consultant	Allspring Global Investments	1415 Vantage Park Drive 3rd Flr Charlotte NorthCarolina 28203	\$100,001 or more

Business Ownership or Equity

Did you or your spouse/partner own more than 1% of an equity in any business at any time during 2024? No

<i>What was the name of the business?</i>	<i>Business Street Address</i>	<i>If you are the owner, what percentage equity did you own?</i>



Did you transfer any equity or ownership in a business to your spouse/partner during the past calendar year? No

<i>What was the name of the business?</i>	<i>Briefly describe the equity</i>	<i>To whom did you transfer the equity?</i>

Did you take a leave of absence from a business in the past calendar year with the understanding that you would work again for that company in the future? No

<i>What was the name of the business?</i>	<i>Business Address</i>

Gifts and Other Payments

Did you or your spouse/partner receive a gift you need to report in 2024? No

<i>Who was the source of the gift?</i>	<i>Source Address</i>	<i>What is the affiliation of the source?</i>	<i>Who received the gift?</i>	<i>If you received the gift, what was the estimated fair market value?</i>

Did you or your spouse/partner receive any honoraria you need to report in 2024? No



<i>Who received the honorarium?</i>	<i>What was the name of the organization that gave the honorarium?</i>	<i>Organization Address</i>	<i>What was the name of the representative of the organization?</i>	<i>Representative Address</i>

Did you or your spouse/partner receive a reimbursement you need to report in 2024?

No

<i>Who received the reimbursement?</i>	<i>If you received the reimbursement, what was the estimated fair market value?</i>	<i>What was the name of the organization that paid the reimbursement?</i>	<i>Organization Address</i>	<i>What was the name of the representative of the organization that paid the reimbursement?</i>	<i>Representative Address</i>

Securities and Investments

Do you or your spouse/partner own any securities issued by the Commonwealth of Massachusetts or any public agency, county, or municipality? Yes

<i>Who owns the security?</i>	<i>Name the issuer of the security</i>	<i>Describe the security</i>	<i>If you own the security, please list the income it generated in 2024</i>
Me	Putnam Investments	MA tax exempt incomes mutual fund	



Did you or your spouse/partner own any securities or investments as of December 31, 2024? Yes

Who owns the investment?	What is the name of the Issuer?	Please describe the security	Where is the security's principal place of business?
Me	Ameriprise Financial	Invested in a managed brokerage account, invested in multiple stocks, mutual funds and ETFs. Please contact for details	Not Applicable

Trusts

Did you or your spouse/partner have a beneficial ownership interest or serve as the trustee of a business or charitable trust as of December 31, 2024? No

<i>What is the name of the trust?</i>	<i>Trust Address</i>	<i>What day was the trust created?</i>	<i>Please name the grantors</i>	<i>Please list the trustees</i>	<i>Who are the trust beneficiaries?</i>	<i>What percentage of the trust equity do you own?</i>	<i>How much income did you earn from the trust in 2024?</i>



Did you or your spouse/partner own any securities and investments in a business or charitable trust with a fair market value of more than \$1,000 as of December 31, 2024? No

<i>What is the name of the trust?</i>	<i>Trust Address</i>	<i>What is the name of the Issuer?</i>	<i>Describe the security:</i>

Did you or your spouse/partner own securities and investments held in a family trust with a fair market value of more than \$1,000 as of December 31, 2024? No

<i>Who are the trust beneficiaries?</i>	<i>Who is the Issuer?</i>	<i>Describe the security:</i>	<i>Address of real estate held in the trust</i>

Did you or your spouse/partner have a beneficial ownership interest or serve as a trustee of a realty trust as of December 31, 2024? No

<i>What is the name of the trust?</i>	<i>Trust Address</i>	<i>When was the trust created</i>	<i>Please name the grantors</i>	<i>Please list the trustees</i>	<i>Who are the trust beneficiaries ?</i>	<i>What percentage of the trust equity do you own?</i>



Do you or your spouse/partner beneficially own property in a realty trust as of December 31, 2024? No

<i>What is the name of the trust?</i>	<i>Trust Address</i>	<i>Please describe the property held in the trust:</i>	<i>If the property is in Massachusetts, please list its assessed value:</i>	<i>What are the names on the deed?</i>	<i>Did you make any income from the property in 2024? Please select the amount:</i>

Are there any mortgages — including home equity and reverse mortgage loans — as of December 31, 2024, on any property held in a business, charitable, or realty trust that you owned and reported in this form? No

<i>What is the name of the trust?</i>	<i>Address of real estate held in the trust</i>	<i>What is the name of the creditor?</i>	<i>Creditor Address</i>	<i>If you borrowed the loan, what was the original amount?</i>	<i>If you borrowed the loan, how much is still owed?</i>	<i>What is the interest rate on the loan?</i>	<i>What year is the mortgage due or terminated?</i>

Was any property in Massachusetts bought by or transferred to a business, charitable, family, or realty trust owned by you in 2024? No

<i>Address of property bought in the trust</i>	<i>Please describe the property held in the trust:</i>	<i>What is the name of the seller or transferor?</i>



Where any properties in Massachusetts sold by or transferred from a business, charitable, family, or realty trust owned by you in 2024? No

<i>Address of property bought in the trust</i>	<i>Please describe the property held in the trust:</i>	<i>What is the name of the seller or transferor?</i>

Real Estate

Did you or your spouse/partner own any real estate in Massachusetts with an assessed value of more than \$1,000 as of December 31, 2024? (Does not include out-of-state property) Yes

<i>Address of property</i>	<i>Please describe the property</i>	<i>Who are the people holding interest in the property?</i>	<i>If you own the property, what is the assessed value?</i>
681 Massachusetts Ave #5 Boston Massachusetts 02118	Condo	Melissa Carlson and Mike Dalton	\$100,001 or more
105 Spring Valley Road Wellfleet Massachusetts 02667	Single Family Vacation Home	Melissa Carlson and Mike Dalton	\$100,001 or more

Did you or your spouse/partner have a direct or indirect ownership of any business, investment, or rental properties with an assessed value of more than \$1,000 in 2024? This includes time-share arrangements. No

<i>Address of property</i>	<i>Please describe the property</i>	<i>Who are the people holding interest in the property?</i>	<i>If you own the property, what is the assessed value?</i>	<i>Did you make any income from the property in 2024? Please select the amount</i>

Did you or your spouse/partner buy or have transferred any real estate in Massachusetts in 2024? No



<i>Address of property</i>	<i>Please describe the property</i>	<i>What is the name of the seller or transferor?</i>	<i>Address of the seller or transferor</i>

Did you or your spouse/partner sell or transfer any real estate in Massachusetts in 2024? No

<i>Address of property</i>	<i>Please describe the property</i>	<i>What is the name of the seller or transferor?</i>	<i>Address of the purchaser or transferee</i>

Mortgage and Debt Information

Do you or your spouse/partner own property subject to a mortgage -- including home equity and reverse mortgages -- as of December 31, 2024? This includes mortgages on property located outside of Massachusetts that were held for business or rental purposes. Yes

<i>Address of property</i>	<i>Please describe the property</i>	<i>Please name the mortgagee:</i>	<i>If you own the property, what is the assessed value?</i>
681 Massachusetts Ave #5 Boston Massachusetts 02118	Condo	Melissa Carlson and Mike Dalton	\$100,001 or more
105 Spring Valley Road Wellfleet Massachusetts 02118	Single family vacation home	Melissa Carlson and Mike Dalton	\$100,001 or more

Do you or your spouse/partner have any debts, loans, or other liabilities that you need to report? No

<i>What is the name of the creditor?</i>	<i>Creditor Address</i>	<i>If you are the borrower, what was the original</i>	<i>If you are the borrower, what is the amount</i>	<i>What is the interest rate on the loan?</i>	<i>What year is the loan due or terminated?</i>	<i>Please list loan collateral:</i>



		<i>amount borrowed?</i>	<i>currently owed?</i>			

Did any creditors forgive a debt of more than \$1,000 to you or your spouse/partner in 2024? You do not have to include debts forgiven by a spouse, close relative, or the spouse of a close relative. No

<i>What is the name of the creditor?</i>	<i>Creditor Address</i>	<i>Please identify the amount forgiven</i>

Non-profit and Corporate Boards

Please list any non-profit or corporate boards on which you sat during Calendar Year 2024

Name of Entity:	Position Held:	Did you receive compensation from this Entity?

Certification

I certify under the pains and penalties of perjury that:

- I made a diligent effort to obtain the required information concerning myself and my immediate family members; and
- The information provided on this form and any attachments is true and complete.

E-Signature



Signature Name: Melissa Carlson

Signature Date: 2025-07-08