Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Altman, Roy
U.S. District Court - Florida Southern
District Judge

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. Â§ 13141 et. seq., 5 U.S.C. Â§ 7353, and Judicial Conference regulations.

/s/ Altman, Roy [electronically signed on Sep 17, 2026 2:20pm by Altman, Roy in JEFS]
/s/ Altman, Roy [electronically signed on Aug 12, 2026 3:07pm by Altman, Roy in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	AEI Enterprise Club National Board	Non-Profit	Member
2.	Denver University Advisory Board	Non-Profit	Member

II. Agreements

I do not have any Agreements to report
No entries in this section

III A. Filer Non-Investment Income

I do not have any Filer Non-Investment Income to report
No entries in this section

III B. Spouse Non-Investment Income

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	Biscayne Bay Waterkeeper			$0.00	
2.	Lever for Change			$0.00	

IV. Reimbursements

	SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	Federalist Society	Jan 7, 2025	Jan 7, 2025	Houston, TX	Speech	Flight & Parking
2.	Federalist Society	Jan 27, 2025	Jan 27, 2025	St. Louis, MO	Speech	Flight & Parking

	SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
3.	Federalist Society	Feb 10, 2025	Feb 10, 2025	Chicago, IL	Speech	Flight & Parking
4.	Federalist Society	Feb 24, 2025	Feb 24, 2025	Charlotte, NC	Speech	Flight & Parking
5.	AEI Santa Barbara	Apr 21, 2025	Apr 23, 2025	Santa Barbara, CA	Speech	Flight, Hotel, Uber & Parking
6.	Columbia University Institute of Global Politics	Apr 7, 2025	Apr 8, 2025	New York, NY	Speech	Flight & Parking
7.	Originalism for Judges Seminar	May 2, 2025	May 2, 2025	Tampa, FL	Seminar	Flight, Uber, & Parking
8.	Tzomet Game	May 18, 2025	May 19, 2025	New York, NY	Seminar	Flight & Food
9.	Columbia University Institute of Global Politics	Apr 27, 2025	Apr 29, 2025	New York, NY	Seminar	Flight & Uber
10.	Korn/Ferry International	Sep 26, 2025	Sep 27, 2025	Tampa, FL	Presentation	Flight, Hotel, & Parking
11.	Federalist Society	Sep 29, 2025	Sep 29, 2025	Raleigh, NC	Speech	Flight, Uber, & Food
12.	NYU Law	Oct 7, 2025	Oct 8, 2025	New York, NY	Speech	Flight, Uber, & Food
13.	Columbia Law School	Oct 21, 2025	Oct 21, 2025	New York, NY	Speech	Flight & Parking
14.	AJC Cincinnati	Oct 23, 2025	Oct 24, 2025	Cincinnati, OH	Speech	Flight, Uber & Parking
15.	Federalist Society	Nov 6, 2025	Nov 7, 2025	Washington DC	Seminar & Presentation	Flight, Uber & Parking
16.	American Jewish Committee (AJC)	Dec 15, 2025	Dec 15, 2025	Tampa, FL	Speech	Flight, Uber, & Food
17.	Federalist Society	Apr 7, 2025	Apr 8, 2025	New Haven, CT	Speech	Flight & Uber

V. Gifts

	SOURCE OF GIFT	DESCRIPTION	VALUE
1.	World Jewish Congress	Flight, Transportation, Hotel, Food, & Programming	$11,832.00
2.	Columbia University Institute of Global Politics	Flight & Parking	$610.00
3.	Christians United for Israel	Flight & Hotel	$1,509.00
4.	Hertog Foundation	Flight & Transportation	$634.00
5.	AJC	Conference Ticket	$695.00
6.	Balate	Hotel	$4,500.00

VI. Liabilities

	CREDITOR NAME	TYPE OF LIABILITY	VALUE
1.	Department of Education	Student Loan	$15,000 or less
2.	US Bank National Association	Other: Mortgage	$500,001 - $1,000,000

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**Rental House - Asheville, NC- Purchased 10/12/2021 for $986,901**	$15,001 - $50,000	Rent	$1,000,001 - $5,000,000	Cost (Real Estate Only)
2.	**(H) Trust dtd 01/11/2011: 1 (H)**				
2-A.	Merrill Lynch - Cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
2-B.	ML Bank Deposit Program (Bank of America)	$5,001 - $15,000	Interest	$500,001 - $1,000,000	Cash/Market
2-C.	BLF Treasury Trust	$5,001 - $15,000	Interest	$250,001 - $500,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
2-D.	U.S. Treasury Bill	$1,001 - $2,500	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Matured	Jan 28, 2025	$500,001 - $1,000,000

2-E.	U.S. Treasury Bill	$1,001 - $2,500	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Matured	May 8, 2025	$250,001 - $500,000

2-F.	U.S. Treasury Bill	$2,501 - $5,000	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Matured	Dec 11, 2025	$500,001 - $1,000,000

2-G.	Abbott Labs - Common Stock	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
2-H.	Abbvie Inc. - Common Stock	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
2-I.	Automatic Data Proc. - Common Stock	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
2-J.	Beckton Dickinson - Common Stock	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-K.	Cisco Systems Inc. - Common Stock	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
2-L.	Diageo PLC SPSD ADR New	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-M.	Dover - Common Stock	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
2-N.	Johnson & Johnson - Common Stock	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
2-O.	Kimberly Clark - Common Stock	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-P.	McDonalds Corp - Common Stock	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
2-Q.	Pepsico Inc. - Common stock	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-R.	Procter & Gamble Co. - Common Stock	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
2-S.	Waste Management Inc. - Common Stock	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
2-T.	Zoetis Inc. - Common Stock	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
2-U.	Wells Fargo & Co.	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

3.	**(H) Trust dtd 01/11/2011: 2 (H)**				
3-A.	Merrill Lynch - Cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
3-B.	ML Deposit Account (BOA)	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
3-C.	ML Preferred Deposit (BOA)	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
3-D.	U.S. Treasury Bill	$2,501 - $5,000	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Matured	Jul 17, 2025	$100,001 - $250,000

3-E.	Amazon - Common Stock		None	$100,001 - $250,000	Cash/Market
3-F.	Apple Inc. - Common Sotck P1	$5,001 - $15,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
3-G.	Chipotle Mexican Grill - Common Stock		None	$50,001 - $100,000	Cash/Market
3-H.	Johnson & Johnson	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
3-I.	JP Morgan	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
3-J.	McDonald's Corp	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
3-K.	META Platforms	$1,000 or less	Dividend	$250,001 - $500,000	Cash/Market
3-L.	Netflix - Common Stock		None	$50,001 - $100,000	Cash/Market
3-M.	Solventum Corp. - Common Stock		None	$15,000 or less	Cash/Market
3-N.	Starbucks Corp - Common Stock	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
3-O.	Union Pacific	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
3-P.	3M Company - Common Stock	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
3-Q.	Calvert Global Water - Mutual Fund	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jun 1, 2025	$15,000 or less

3-R.	Invesco QQQ TR Series 1 - Mutual Fund	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

4.	**(H) Trust dtd 01\11\2011: 3 (H)**				
4-A.	Charles Schwab - Sweep Account	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
4-B.	Schwab Government Money	$1,001 - $2,500	Dividend,Distribution	$50,001 - $100,000	Cash/Market
4-C.	US Treasuries	$1,001 - $2,500	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 27, 2025	$15,001 - $50,000
(2).	Matured	Sep 25, 2025	$15,001 - $50,000

4-D.	U.S. Treasury Bill	$1,000 or less	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Matured	Mar 27, 2025	$15,001 - $50,000

4-E.	U.S. Treasury Bill	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 25, 2025	$15,001 - $50,000

4-F.	Amazon.com Inc.		None	$15,001 - $50,000	Cash/Market
4-G.	Apple, Inc - Common Stock	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
4-H.	Berkshire Hathaway - Common Stock		None	$100,001 - $250,000	Cash/Market
4-I.	Bristol Myers Squibb - Common Stock	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-J.	Caterpillar, Inc. - Common Stock	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
4-K.	Chevron Corp. - Common Stock	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
4-L.	Deere & Co. - Common Stock	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
4-M.	Freeport McMoran	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
4-N.	Heico Corp	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
4-O.	Home Depot Inc	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
4-P.	IBM Corp. - Common Stock	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
4-Q.	JP Morgan - Common Stock	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
4-R.	Johnson & Johnson - Common Stock	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
4-S.	Mastercard, Inc. - Common Stock	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
4-T.	Microsoft Corp. - Common Stock	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
4-U.	RTX (FKA Raytheon Technologies)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
4-V.	Pepsico, Inc. - Common Stock	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-W.	Southern Co. - Common Stock	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
4-X.	Starbucks Corp - Common Stock	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
4-Y.	SPDR S&P Midcap	$1,000 or less	Dividend,Distribution	$50,001 - $100,000	Cash/Market
4-Z.	Verizon Communications - Common Stock	$1,000 or less	Dividend	$15,000 or less	Cash/Market

5.	**(H) Trust DTD 10\01\2018 (H)**				
5-A.	Charles Schwab Sweep Account	$1,000 or less	Interest	$15,000 or less	Cash/Market
5-B.	Amazon.com Inc.		None	$15,001 - $50,000	Cash/Market
5-C.	Apple, Inc. - Common Stock	$15,001 - $50,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$15,000 or less

5-D.	Auto Data Processing	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
5-E.	Berkshire Hathaway, Inc. - Common Stock	$5,001 - $15,000	Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 24, 2025	$15,000 or less

5-F.	Caterpillar, Inc. - Common Stock	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
5-G.	Chevron Corp. - Common Stock	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
5-H.	Costco Wholesale Co. - Common Stock	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
5-I.	Deere & Co. - Common Stock	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
5-J.	Freeport McMoran	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
5-K.	FRP Holdings, Inc. - Commons Stock		None		

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 20, 2025 $15,000 or less				
5-L.	Home Depot	$5,001 - $15,000	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Feb 24, 2025 $15,001 - $50,000				
5-M.	IBM Corp. - Common Stock	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
5-N.	JP Morgan Chase & Co. - Common Stock	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
5-O.	Johnson & Johnson - Common Stock	$1,001 - $2,500	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jan 3, 2025 $15,000 or less				
5-P.	Mastercard, Inc. - Common Stock	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
5-Q.	McDonalds Corp. - Common Sotck	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Feb 24, 2025 $15,000 or less				
5-R.	Merck	$2,501 - $5,000	Dividend,Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Oct 27, 2025 $15,001 - $50,000				
5-S.	Microsoft Corp. - Common Stock	$15,001 - $50,000	Dividend,Gain	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jun 20, 2025 $15,001 - $50,000				
5-T.	Oracle Corp	$15,001 - $50,000	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Sep 17, 2025 $15,001 - $50,000				
5-U.	Pepsico, Inc. - Common Stock	$5,001 - $15,000	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Oct 27, 2025 $15,001 - $50,000				
5-V.	Southern Co. - Pfd	$5,001 - $15,000	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Feb 24, 2025 $15,000 or less				
5-W.	Vulcan Materials - Common Stock	$5,001 - $15,000	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Feb 24, 2025 $15,000 or less				
5-X.	SPDR S&P Midcap 400 ETF	$1,000 or less	Dividend,Distribution	$50,001 - $100,000	Cash/Market
6.	**(H) IRA (H)**				
6-A.	Charles Schwab Sweep Account	$1,000 or less	Interest	$15,000 or less	Cash/Market
6-B.	Berkshire Hathaway - Common Stock		None	$15,000 or less	Cash/Market
6-C.	IShares Core S&P 500 - ETF	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
6-D.	IShares Core US Aggregate Bond ETF	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-E.	IShares MSCI EAFE - ETF	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-F.	IShare North American Natural Resou - ETF	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-G.	Vangaurd FTSE Emerging Markets - ETF	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-H.	Vanguard Real Estate - ETF	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-I.	Vanguard Small Cap - ETF	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7.	**(H) IRA Rollover (H)**				
7-A.	Charles Schwab Sweep Account	$1,000 or less	Interest	$15,000 or less	Cash/Market
7-B.	U.S. Treasury Bill	$1,000 or less	Interest		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Buy	Mar 27, 2025	$15,001 - $50,000	
	(2).	Matured	Sep 25, 2025	$15,001 - $50,000	
7-C.	U.S. Treasury Bill	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Buy	Sep 25, 2025	$15,001 - $50,000	
7-D.	U.S. Treasury Bill	$1,000 or less	Interest		
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Matured	Mar 27, 2025	$15,001 - $50,000	
7-E.	Berkshire Hathway - Common Stock		None	$50,001 - $100,000	Cash/Market
7-F.	Deere & Co. - Common Stock	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
7-G.	Freeport McMoran	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-H.	Home Depot	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-I.	IBM Corp. - Common Stock	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
7-J.	JP Morgan Chase & Co. - Common Stock	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-K.	Johnson & Johnson - Common Stock	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-L.	Mastercard, Inc. - Common Stock	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-M.	Microsoft Corp. - Common Stock	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-N.	Pepsico, Inc. - Common Stock	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-O.	Phillips 66	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-P.	RTX (FKA Raytheon Technologies)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-Q.	Southern Co. - Common Stock	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-R.	Verizon Communications - Common Stock	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-S.	Ishares Tips Bond ETF	$1,000 or less	Distribution	$15,000 or less	Cash/Market
8.	**(H) 529 Plan #1 (H)**				
8-A.	Aggressive Track: 70% Equity	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Buy	Jul 8, 2025	$50,001 - $100,000	
8-B.	Moderately Aggressive Track: 60% Equity	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Buy	Jul 8, 2025	$15,001 - $50,000	
8-C.	Moderate Track: 50% Equity	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Buy	Jul 8, 2025	$15,001 - $50,000	
8-D.	Schwab 529 Aggressive Portfolio (95% Equity)	$1,001 - $2,500	Dividend,Gain		
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold	Jul 8, 2025	$50,001 - $100,000	
8-E.	Schwab 529 Moderately Aggresive Portfolio (80% Equity)	$5,001 - $15,000	Dividend,Gain		
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold	Jul 8, 2025	$15,001 - $50,000	
8-F.	Schwab 529 Moderate Portfolio (60%, 70%, 80% Equity)	$1,000 or less	Dividend,Gain		
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold	Jul 8, 2025	$15,001 - $50,000	
9.	**(H) 529 Plan #2 (H)**				

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
9-A.	Moderate Track: 60% Equity	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
9-B.	Moderately Aggressive Track: 70% Equity	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
9-C.	Aggressive Track: 80% Equity	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

VIII. Additional Information or Explanations

	ADDITIONAL INFORMATION OR EXPLANATION
1.	Rental Home owned in Asheville, NC- Purchased on 10/12/21 for $986,901.