AO 10
Rev. 1/2019

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 101-111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Berman, Richard M.	U.S. District Court - S.D.N.Y.	08/11/2025
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
U.S. District Judge, Senior Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
U.S. District Court 500 Pearl Street New York, NY 10007		

IMPORTANT NOTES: ***The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.***

I. POSITIONS. *(Reporting individual only; see pp. 9-13 of filing instructions.)*

☑ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.		
2.		
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions.)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE
1.		
2.		
3.		
4.		

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets)	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. Apple Inc	A	Dividend	L	T	Buy (add'l)	02/15/24	J		
2.					Buy (add'l)	03/25/24	J		
3.					Buy (add'l)	03/26/24	J		
4. Liberty Media Corp Liberty Cap Cl A	A	Dividend	K	T					
5. LM CBA Equity Income Builder Fund CL A	A	Dividend	K	T					
6. Morgan Stanley Money Market Fund	A	Interest	M	T					
7. US Treasury Inflation Index NTS CPI Non Seasonally	A	Interest	M	T					
8. SPDR S&P 500 ETF Trust	B	Dividend	N	T	Buy (add'l)	03/04/24	J		
9.					Buy (add'l)	05/02/24	J		
10.					Buy (add'l)	05/15/24	J		
11.					Buy (add'l)	06/13/24	K		
12.					Buy (add'l)	06/20/24	J		
13.					Buy (add'l)	06/28/24	K		
14.					Buy (add'l)	07/03/24	J		
15.					Buy (add'l)	07/09/24	J		
16.					Buy (add'l)	07/16/24	J		
17.					Sold (part)	08/09/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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☐ NONE *(No reportable income, assets, or transactions.)*

	A. Description of Assets (including trust assets)	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
18.						Sold (part)	10/02/24	J	A	
19.						Buy (add'l)	11/11/24	J		
20.	Liberty Media Corp Liberty Cap com Ser A		None	K	T					
21.	Vanguard Total Stock Index	D	Distribution	M	T					
22.	Ishares Russell 2000 Index Fund	B	Dividend	M	T					
23.	UTS SPDR Trust Ser 1	C	Dividend	L	T					
24.	TSASC Inc NY TOB Settlement Asset	C	Interest	L	T					
25.	New York ST Urban Dev Corp Rev Personal Income Tax	B	Interest	M	T					
26.	T-C Infl Lnkd Bond Rtmt	A	Distribution	K	T					
27.	T-C Lifecycle 2020 Rtmt		None	K	T					
28.	T-C Lifecycle Rtmt Inc Rtmt	A	Distribution	K	T					
29.	Property Indian River County, FL	E	Rent	L	W					
30.	SPDR Gold Trust		None	K	T					
31.	Ishares TR Dow Jones US	A	Dividend	J	T					
32.	Union Pacific corp	A	Dividend	J	T					
33.	Rydex ETR TR Index Fund	A	Dividend	J	T					
34.	New York State Dorm Auth Pers Inc Tax Rev 2/15/2022	B	Interest	L	T					

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
35. Spartan Total Market Index	A	Interest	K	T					
36. Spartan Small Cap Index	A	Interest	K	T					
37. Costco Wholesale Crp	A	Dividend	K	T					
38. Goldman Sachs Group Inc	A	Dividend	K	T	Buy (add'l)	05/02/24	J		
39.					Buy (add'l)	05/15/24	J		
40.					Buy (add'l)	06/07/24	K		
41. United States Treasury Bill	B	Interest	M	T					
42. Liberty Spinco Inc Cl A	A	Dividend	J	T					
43. Invisa Inc	A	Dividend	J	T					
44. Stratasys LTD	A	Dividend	J	T					
45. Vanguard S&P 500 ETF	A	Dividend	K	T					
46. Netflix	A	Dividend	K	T					
47. Vanguard TTL Stk Mkt ETF	A	Dividend	K	T					
48. US Treasury Bill 3/16/2017	A	Interest	L	T					
49. Amazon Com Inc	A	Dividend	L	T					
50. Dunkirk NY 3/15/2031	A	Interest			Sold	02/22/24	M	A	
51. United States Treasury Bill 7/5/18	A	Interest	M	T					

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52. European Monetary Unit Savings Dep	A	Interest	J	T					
53. Time Warner Inc	A	Dividend	J	T					
54. US Treasury Bill Matures 10/11/18	A	Interest	M	T					
55. US Treasury Bill Matures 11/15/18	A	Interest	L	T					
56. US Treasury Bill Matures 3/28/19	A	Interest	L	T					
57. US Treasury Bill Matures 1/17/19	A	Interest	M	T					
58. US Treasury Bill Matures 4/11/19	A	Interest	M	T					
59. US Treasury Bill 7/5/18	A	Interest	N	T					
60. Yonkers NY Serial Genl Oblig Ser A 9/1/24	A	Interest			Sold	02/22/24	K	A	
61. Discovery Inc Ser A	A	Dividend	J	T					
62. US Treasury Bill 10/11/18	A	Interest	M	T					
63. US Treasury Bill 1/17/19	A	Interest	M	T					
64. US Treasury Bill 4/11/19	A	Interest	M	T					
65. AT&T Inc	A	Dividend	J	T					
66. Visa Inc	A	Dividend	J	T					
67. Schenectady CN BE 3125 42FB15	A	Interest			Sold	07/10/24	K	A	
68. Us Treasury Bill Mature 7/9/20 Issued 1/9/20	B	Interest	M	T					

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69. Microsoft Corp	B	Dividend	M	T	Buy (add'l)	02/15/24	J		
70.					Buy (add'l)	03/08/24	J		
71.					Buy (add'l)	03/26/24	J		
72.					Buy (add'l)	05/02/24	J		
73.					Buy (add'l)	05/15/24	J		
74.					Buy (add'l)	05/28/24	J		
75.					Buy (add'l)	07/16/24	J		
76.					Sold (part)	10/02/24	J	A	
77. Berkshire Hathaway	A	Dividend	L	T	Buy (add'l)	05/02/24	J		
78.					Buy (add'l)	07/09/24	J		
79. Lululemon Athetica Inc	A	Dividend	K	T					
80. Zoom Video Communications	A	Dividend	J	T					
81. Vanguard Mid Cap Growth	A	Dividend	J	T					
82. Vanguard Growth	A	Dividend	J	T					
83. Vanguard Prime MMKT	A	Dividend	M	T					
84. Unitedhealth GP	A	Dividend	J	T	Buy (add'l)	02/29/24	J		
85.					Buy (add'l)	03/25/24	J		

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86. Bank of America Corp	A	Dividend	J	T					
87. Johnson & Johnson	A	Dividend	J	T					
88. General Motors	A	Dividend	J	T					
89. Citigroup Inc	A	Dividend			Sold	06/07/24	J	A	
90. Brandes International EQ	A	Dividend	K	T	Sold (part)	06/04/24	J	A	
91. Facebook Inc	A	Dividend	K	T					
92. TJX COS Inc	A	Dividend	J	T					
93. Amgen Inc	A	Dividend	J	T					
94. Wells Fargo & Co	A	Dividend	J	T					
95. Qualcomm Inc	A	Dividend	J	T					
96. Home Depot Inc	A	Dividend	J	T	Buy (add'l)	06/04/24	J		
97. Broadcom Inc	A	Dividend	J	T					
98. Blackstone Group	A	Dividend	J	T	Buy (add'l)	05/08/24	J		
99. Legg Mason Clearbridge Sel I	A	Dividend	K	T					
100. Walt Disney Co Hldg	A	Dividend			Buy (add'l)	05/08/24	K		
101.					Sold	06/07/24	J	A	
102. Blackline Inc	A	Dividend	J	T					

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103. Brooks-Automation Inc	A	Dividend	J	T					
104. Fastenal Co	A	Dividend	J	T					
105. Mastercard Inc	A	Dividend	J	T					
106. Tractor Supply Co	A	Dividend	J	T					
107. Tyler Technologies Inc	A	Dividend			Sold	03/25/24	J	A	
108. Verisk Analytics Inc	A	Dividend	J	T	Sold (part)	10/16/24	J	A	
109. Walgreens Boots Alliance Inc	A	Dividend			Sold	05/08/24	J	A	
110. Waste Connections Inc	A	Dividend	J	T					
111. Abbott Laboratories	A	Dividend	J	T					
112. Accenture PLC Ireland	A	Dividend	J	T					
113. Air Prod & Chem	A	Dividend	J	T					
114. Alphabet Inc	A	Dividend	L	T	Buy (add'l)	02/15/24	J		
115.					Buy (add'l)	02/29/24	J		
116.					Buy (add'l)	03/25/24	J		
117.					Buy (add'l)	05/15/24	J		
118. American Tower Reit	A	Dividend	J	T					
119. Ameriprise Fincl Inc	A	Dividend	J	T					

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120. Amphenol Corp	A	Dividend	J	T					
121. Ansys Inc	A	Dividend	J	T					
122. Aptargroup Inc	A	Dividend	J	T	Sold (part)	05/08/24	J	A	
123. Aptiv PLC	A	Dividend	J	T					
124. Assurant Inc	A	Dividend	J	T					
125. Atlassian Corp	A	Dividend			Sold (part)	02/15/24	J	A	
126.					Sold	05/08/24	J	A	
127. Automatic Data Processing Inc	A	Dividend	J	T					
128. Becton Dickinson & Co	A	Dividend	J	T					
129. Bright Horizons Family Solutions	A	Dividend	J	T					
130. Broadridge Fin Solu LLC	A	Dividend	J	T					
131. Cable One Inc	A	Dividend			Sold	02/15/24	J	A	
132. CDW Corporation	A	Dividend	J	T	Sold (part)	10/16/24	J	A	
133. Costar Group Inc	A	Dividend	J	T					
134. Dollar Gen Corp	A	Dividend			Sold	03/25/24	J	A	
135. Ecolab Inc	A	Dividend	J	T					
136. Fidelity Natl Information	A	Dividend			Sold	02/15/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
137. Gilead Science	A	Dividend			Sold	03/25/24	J	A	
138. Glacier Bancorp Inc	A	Dividend			Sold	03/25/24	J	A	
139. Guidewire Software Inc	A	Dividend	J	T					
140. Heico Corp	A	Dividend	J	T					
141. Idexx Labs	A	Dividend	J	T					
142. Ill Tool Works Inc	A	Dividend	J	T					
143. Illumina Inc	A	Dividend			Sold	03/25/24	J	A	
144. Intuit Inc	A	Dividend	J	T					
145. Jack Henry & Assoc Inc	A	Dividend	J	T					
146. Kimberly Clark Corp	A	Dividend	J	T					
147. Markel Corp	A	Dividend	J	T					
148. Masimo Corporation	A	Dividend			Sold	02/15/24	J	A	
149. Mc Cormick and Co	A	Dividend			Sold	03/25/24	J	A	
150. McDonalds Corp	A	Dividend	J	T					
151. Merck & Co Inc	A	Dividend	J	T					
152. Nexterra Energy Inc	A	Dividend	J	T					
153. Nike Inc	A	Dividend	J	T					

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
154. Okta Inc	A	Dividend			Sold	02/15/24	J	A	
155. Old Dominion Freight Line	A	Dividend	J	T					
156. Regeneron Pharmaceuticals Inc	A	Dividend	J	T					
157. Republic Services Inc	A	Dividend	J	T					
158. Roper Technologies Inc	A	Dividend	J	T					
159. Sherwin Williams Company	A	Dividend	J	T					
160. Snap On Inc	A	Dividend	J	T					
161. Stericycle Inc	A	Dividend			Sold	03/25/24	J	A	
162. Steris PLC	A	Dividend	J	T					
163. Stryker Corp	A	Dividend	J	T					
164. Teleflex Inc	A	Dividend			Sold (part)	03/25/24	J	A	
165.					Sold	05/08/24	J	A	
166. Tesla Inc	A	Dividend	K	T	Buy (add'l)	06/20/24	J		
167. Texas Instruments	A	Dividend			Sold	10/16/24	J	A	
168. Thermo Fisher Scientific	A	Dividend	J	T					
169. Trade Desk Inc Class A	A	Dividend	J	T					
170. Transdigm Group Inc	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
171. Twilio Inc	A	Dividend			Sold (part)	03/25/24	J	A	
172.					Sold	05/08/24	J	A	
173. Verizon Communications	A	Dividend	J	T					
174. WEC Energy Group Inc	A	Dividend	J	T					
175. Xcel Energy Inc	A	Dividend			Sold	03/25/24	J	A	
176. Zoetis Inc	A	Dividend	J	T					
177. ABB Ltd	A	Dividend	J	T					
178. Advanced Micro Devices	A	Dividend	J	T	Buy (add'l)	05/28/24	J		
179. Adyen N V Unsponsored	A	Dividend			Sold	05/08/24	J	A	
180. Amgen inc	A	Dividend	J	T					
181. Ball Corporation	A	Dividend			Sold	05/08/24	J	A	
182. Biomarin Pharmac	A	Dividend	J	T					
183. Blackstone Inc	A	Dividend	J	T	Buy (add'l)	05/08/24	J		
184.					Buy (add'l)	06/04/24	J		
185. Calavo Growers Inc	A	Dividend			Sold	05/08/24	J	A	
186. Calif Water Svc GP Del	A	Dividend			Sold	05/08/24	J	A	
187. Chewy Inc	A	Dividend			Sold	02/15/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
188. Clorox Co	A	Dividend	J	T					
189. Coca Cola Co	A	Dividend	J	T					
190. Commerce Bancshares	A	Dividend			Sold	10/16/24	J	A	
191. Cooper Co Inc New	A	Dividend	J	T	Sold (part)	10/16/24	J	A	
192. Costco Wholesale Corp New	A	Dividend	J	T					
193. Coterra Energy Inc	A	Dividend	J	T					
194. Crown Castle Intl Corp	A	Dividend			Sold	05/08/24	J	A	
195. Danaher Corporation	A	Dividend	J	T					
196. Veralto Corp (Spinoff Danaher)	A	Dividend	J	T					
197. Dexcom Inc	A	Dividend			Sold	10/16/24	J	A	
198. Diageo PLC Spon Adr New	A	Dividend			Sold	10/16/24	J	A	
199. Everest Re Group LTD	A	Dividend	J	T					
200. Henkel AG & Co KGAA	A	Dividend			Sold	05/08/24	J	A	
201. Intuitive Surgical Inc	A	Dividend	J	T					
202. Kering S A ADR	A	Dividend			Sold	05/08/24	J	A	
203. Motorola Solutions Inc	A	Dividend	J	T					
204. Northern Trust Corporation	A	Dividend			Sold	10/16/24	J	A	

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Name of Person Reporting	Date of Report
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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A. Description of Assets (including trust assets)	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
205. Nvidia Corporation	A	Dividend	M	T	Buy (add'l)	03/04/24	J		
206.					Buy (add'l)	03/08/24	J		
207.					Buy (add'l)	03/26/24	K		
208.					Buy (add'l)	04/23/24	J		
209.					Buy (add'l)	05/02/24	J		
210.					Buy (add'l)	05/15/24	J		
211.					Buy (add'l)	05/28/24	J		
212.					Buy (add'l)	06/20/24	J		
213.					Buy (add'l)	06/28/24	J		
214.					Buy (add'l)	07/03/24	J		
215.					Buy (add'l)	07/16/24	J		
216.					Buy (add'l)	07/17/24	J		
217.					Buy (add'l)	07/26/24	J		
218.					Buy (add'l)	10/09/24	J		
219.					Buy (add'l)	10/29/24	J		
220.					Buy (add'l)	11/11/24	K		
221. Paypal Hldgs Inc	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
222. Phillips 66 Com	A	Dividend	J	T					
223. Reinsurance Group of America	A	Dividend	J	T					
224. Rockwell Automation Inc	A	Dividend	J	T					
225. Ross Stores Inc	A	Dividend	J	T					
226. Salesforce.com Inc	A	Dividend	J	T					
227. Snowflake Inc	A	Dividend	L	T	Buy (add'l)	02/29/24	J		
228.					Buy (add'l)	05/08/24	J		
229.					Buy (add'l)	06/04/24	J		
230.					Sold (part)	11/11/24	K	A	
231. Synopsys Inc	A	Dividend	J	T					
232. Travelers Companies Inc	A	Dividend	J	T					
233. Uber Technologies Inc	A	Dividend	J	T	Buy (add'l)	05/08/24	J		
234.					Buy (add'l)	06/04/24	J		
235. White Mountain GRP Bermuda	A	Dividend	J	T					
236. Workday Inc Cl A	A	Dividend	J	T					
237. Wright Medical Group	A	Dividend	J	T					
238. Xylem Inc Com	A	Dividend			Sold	10/16/24	J	A	

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
239. Abiomed Inc	A	Dividend	J	T					
240. Adobe Inc	A	Dividend	J	T					
241. AirBNB Inc	A	Dividend			Sold	06/07/24	J	A	
242. Alcon Inc	A	Dividend	J	T					
243. Align Technology	A	Dividend			Sold	10/16/24	J	A	
244. Affirm Hldgs Inc CL A	A	Dividend			Sold	05/08/24	J	A	
245. Alleghany CP Delaware	A	Dividend	J	T					
246. Ametek Inc New	A	Dividend			Sold	10/16/24	J	A	
247. Aramark Holdings Corporation	A	Dividend			Sold	10/16/24	J	A	
248. Vestis Corp (Spinoff of Aramark)	A	Dividend	J	T					
249. ASML Holding NV NY Reg New	A	Dividend	J	T					
250. Autodesk Inc Delaware	A	Dividend	J	T					
251. Avalonbay Comm Inc	A	Dividend	J	T					
252. Baxter Intl Inc	A	Dividend			Sold	05/08/24	J	A	
253. Beiersdorf AG Unspons ADR	A	Dividend	J	T					
254. Berkley W R Corp	A	Dividend			Sold	10/16/24	J	A	
255. Blackstone Group Inc CL A	A	Dividend			Sold	05/08/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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256. Block Inc	A	Dividend			Sold	05/08/24	J	A	
257. Booking Holdings Inc	A	Dividend	J	T					
258. Boston Properties Inc	A	Dividend			Sold	05/08/24	J	A	
259. Cabot Oil & Gas Corp A	A	Dividend	J	T					
260. Cal Maine Foods Inc	A	Dividend	J	T					
261. Capital One Financial Corp	A	Dividend	J	T					
262. Charles Schwab New	A	Dividend	J	T					
263. Chipotle Mexican Grill Inc Com	A	Dividend	J	T					
264. Chubb LTD	A	Dividend	J	T					
265. Cincinnati Financial Ohio	A	Dividend			Sold	10/16/24	J	A	
266. Constellation Brands Inc	A	Dividend	J	T					
267. Corteva Inc	A	Dividend	J	T					
268. Crowdstrike Hldgs Inc CL A	A	Dividend	J	T					
269. Deere & Co	A	Dividend			Sold	10/16/24	J	A	
270. Docusign Inc	A	Dividend			Sold	06/07/24	J	A	
271. East West Bancorp	A	Dividend			Sold	05/08/24	J	A	
272. Elanco Animal Health Inc	A	Dividend			Sold	05/08/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
273. Eli Lilly & Co	A	Dividend	J	T					
274. Equifax Inc	A	Dividend			Sold	05/08/24	J	A	
275. Equinix Inc	A	Dividend	J	T					
276. Equity Comwlth Com SH Ben Int	A	Dividend			Sold	10/16/24	J	A	
277. Equity Lifestyle Properties	A	Dividend			Sold	05/08/24	J	A	
278. Estee Lauder Co Inc CL A	A	Dividend			Sold	10/16/24	J	A	
279. Etsy Inc Com	A	Dividend			Sold	05/08/24	J	A	
280. Fiserv Inc Wisconsin	A	Dividend	J	T					
281. Freeport-McMoran CL B	A	Dividend	J	T					
282. Gartner Inc	A	Dividend	J	T					
283. Genl Dynamics Corp	A	Dividend	J	T					
284. Global Payment Inc	A	Dividend	J	T					
285. Godaddy Inc	A	Dividend			Sold	10/16/24	J	A	
286. Hartford Fin Sers Grp Inc	A	Dividend	J	T					
287. HCA Healthcare Inc	A	Dividend			Sold	10/16/24	J	A	
288. Healthcare Tr Amer Inc Cl A	A	Dividend			Sold	05/08/24	J	A	
289. Hubspot Inc	A	Dividend			Sold	05/08/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
290. ICU Medical Inc	A	Dividend			Sold	05/08/24	J	A	
291. Independent Bk Mass	A	Dividend			Sold	05/08/24	J	A	
292. Johnson Ctls Intl PLC	A	Dividend	J	T					
293. KKR & Co Inc CL A	A	Dividend	J	T					
294. Lam Research Corporation	A	Dividend	J	T					
295. Lennar Corporation	A	Dividend	J	T					
296. Liberty Global PLC CL A	A	Dividend	J	T					
297. Lowes Companies	A	Dividend	J	T					
298. Lululemon Athletica Inc	A	Dividend	K	T					
299. LVMH Moet Hennessy Louis Vuitt	A	Dividend			Sold	05/08/24	J	A	
300. Martin Marietta Materials	A	Dividend	J	T					
301. Match Group Inc	A	Dividend			Sold	05/08/24	J	A	
302. Mckesson Corp	A	Dividend	J	T					
303. Medtronic PLC Shs	A	Dividend	J	T					
304. Meta Platforms Inc	A	Dividend	J	T	Buy (add'l)	05/01/24	J		
305. Metlife Incorporated	A	Dividend			Sold	05/08/24	J	A	
306. Metlife Inc 4.75% F	A	Dividend			Sold	05/08/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
307. Metlife Inc 5.62%	A	Dividend			Sold	05/08/24	J	A	
308. Microchip Technologies Inc	A	Dividend			Sold	10/16/24	J	A	
309. Mitsubishi UFJ Fincl Grp	A	Dividend	J	T					
310. Moderna Inc	A	Dividend	J	T					
311. Mongodb Inc CL A	A	Dividend			Sold	05/08/24	J	A	
312. Monster Beverage Corp	A	Dividend	J	T					
313. Morgan Stanley	A	Dividend	J	T					
314. MSCI Inc	A	Dividend			Sold	05/08/24	J	A	
315. MTS Systems Corp	A	Dividend	J	T					
316. Nestle Spon ADR	A	Dividend	J	T					
317. Northrop Grumman CP	A	Dividend	J	T					
318. Oracle Corp	A	Dividend	J	T					
319. O'Reilly Automotive Inc	A	Dividend	J	T					
320. Parker Hannifin Corp	A	Dividend	J	T					
321. Pennon Group PLC	A	Dividend			Sold	05/08/24	J	A	
322. PNC Finl Svcs	A	Dividend			Sold	10/16/24	J	A	
323. Procter & Gamble	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
324. RPM Inc	A	Dividend	J	T					
325. Roblox Corp CL A	A	Dividend			Sold	05/08/24	J	A	
326. S&P Global Inc	A	Dividend	J	T					
327. Sea Limited ADR	A	Dividend			Sold	05/08/24	J	A	
328. Seattle Genetics Inc	A	Dividend	J	T					
329. Severn Trent PLC Spon ADR	A	Dividend			Sold	05/08/24	J	A	
330. Shopify Inc	A	Dividend	J	T					
331. SJW Group	A	Dividend			Sold	10/16/24	J	A	
332. Smith & Nephew PLC	A	Dividend			Sold	10/16/24	J	A	
333. Snap Inc	A	Dividend			Sold	05/08/24	J	A	
334. Sony Corp	A	Dividend	J	T					
335. Steris PLC	A	Dividend	J	T					
336. SVB Financial Group	A	Dividend	J	T					
337. Taiwan Smcndctr MFG Co	A	Dividend	J	T	Buy (add'l)	05/28/24	J		
338. Tapestry Inc	A	Dividend			Sold	10/16/24	J	A	
339. Target Corp	A	Dividend	J	T					
340. TD Ameritrade Holding Corp	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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341. Townebank VA	A	Dividend			Sold	05/08/24	J	A	
342. Transunion	A	Dividend	J	T					
343. UMB Financial Corp	A	Dividend			Sold	05/08/24	J	A	
344. United Utilities Group PLC	A	Dividend			Sold	10/16/24	J	A	
345. Universal Health Services	A	Dividend			Sold	10/16/24	J	A	
346. US Bancorp	A	Dividend	J	T					
347. US Bancorp PFD B	A	Dividend			Sold	05/08/24	J	A	
348. US Concrete Inc	A	Dividend	J	T					
349. Valley Natl Bancorp	A	Dividend			Sold	05/08/24	J	A	
350. Varian Medical Sys Inc	A	Dividend	J	T					
351. Wayfair Inc	A	Dividend			Sold	02/15/24	J	A	
352. Zimmer Biomet Hldgs Inc	A	Dividend	J	T					
353. Zoominfo Technologies Inc	A	Dividend			Sold	05/08/24	J	A	
354. Take Two Interactive Software (Spinoff of Zynga)	A	Dividend	J	T					
355. Invesco S&P 500 Equal Weight	A	Dividend	J	T					
356. Clearbridge Value Trust I	A	Dividend	L	T	Sold (part)	03/25/24	K	A	
357.					Sold (part)	06/04/24	K	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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358. Anheuser Busch Inbev	A	Dividend			Sold	06/04/24	J	A	
359. Comcast Corp	A	Dividend			Sold	06/04/24	J	A	
360. Schlumberger	A	Dividend	J	T	Buy (add'l)	03/25/24	J		
361.					Buy (add'l)	06/04/24	J		
362. Viacomcbs Inc	A	Dividend	K	T					
363. Lord Abbett Short Duration	A	Dividend	K	T					
364. BNY Mellon SM/MD Cap GW I	A	Dividend	J	T					
365. CDN Pacific RY LTD	A	Dividend	J	T					
366. Exxon Mobil Corp	A	Dividend	J	T	Buy (add'l)	06/04/24	J		
367. Nuance Mid Cap Value	A	Dividend	J	T					
368. Southwest Airlines	A	Dividend	J	T					
369. Synchrony Financial	A	Dividend	J	T					
370. Atmos Energy Corp	A	Dividend	J	T					
371. Carrier Global Corporation	A	Dividend	J	T					
372. Siteone Landscapre Supply Inc	A	Dividend			Sold	02/15/24	J	A	
373. Sprout Social Inc	A	Dividend			Sold	02/15/24	J	A	
374. T Rowe Price Group Inc	A	Dividend			Sold	02/15/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
375. VF Corp	A	Dividend			Sold	02/15/24	J	A	
376. WNS Holding Limited	A	Dividend			Sold	02/15/24	J	A	
377. Workiva Inc Cl A	A	Dividend			Sold	02/15/24	J	A	
378. Willscot Mobile Mini Holdings	A	Dividend	J	T					
379. Warner Bros Discovery	A	Dividend	K	T					
380. New York NY Genl Oblig Ser A 8-1-2031	C	Interest	L	T					
381. Metropolitan Trans Auth 5% 11-15-2030	A	Interest			Sold	07/10/24	M	A	
382. East Greenbush NY 3.5% 8-1-2037	A	Interest			Sold	07/10/24	L	A	
383. Rotterdam NY 4% 6-15-2040	D	Interest	M	T					
384. Metropolitan Transportation Authority 5% 11-15-2034	A	Interest			Sold	02/22/24	L	A	
385. New York NYC Hsg Dev Corpmultifam Green 3.75% 11-1-2037	C	Interest	L	T					
386. Port Auth NY & NJ Consolidated Rev 4% 7-15-2036	C	Interest	M	T					
387. Hudson Yds Infrastructure Corp 4% 2-15-2044	A	Interest			Sold	02/22/24	M	A	
388. New York NY 4% 8-1-2042	C	Interest	L	T					
389. Veeva Sys Inc	A	Dividend	J	T					
390. Vulcan Materials Co	A	Dividend	J	T					
391. US Treasury Bill Matures 3/28/24 Issue Date 9/28/23	A	Interest			Redeemed	03/28/24	K	A	

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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A. Description of Assets (including trust assets)	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
392. US Treasury Bill Matues 6/20/24 Issue Date 12/21/23	A	Interest			Redeemed	06/20/24	M	A	
393. US Treasury Bill Matures 3/7/24 Issue Date 9/7/23	A	Interest			Sold (part)	03/04/24	J	A	
394.					Redeemed	03/07/24	L	A	
395. US Treasury Bill Matures 3/28/24 Issue Date 9/28/23	A	Interest			Redeemed	03/28/24	K	A	
396. MSLIF Treasury Securities Inst	B	Dividend			Sold (part)	02/29/24	K	A	
397.					Buy (add'l)	06/21/24	L		
398.					Sold (part)	07/02/24	K	A	
399.					Sold (part)	07/03/24	K	A	
400.					Sold	07/09/24	K	A	
401. NYS Urban Dev Corp Rev Matures 3/15/2049 Coupon 4%	D	Interest	M	T					
402. Triborough Brdg & Tunnel Auth NY Matures 5/15/2046 Coupon 4%	D	Interest	M	T					
403. NYC Transitional Fin Auth Matures 2/1/2044 Coupon 5%	C	Interest	M	T					
404. NYC Transitional Fin Auth Matures 11/1/2035 Coupon 4%	C	Interest	L	T					
405. NYS TWY Auth St Pers Income Tax Matures 3/15/2039 Coupin 4%	C	Interest	L	T					
406. New York OID Matures 8/1/2053 Coupon 4.125%	C	Interest	L	T					
407. NYS Urban Dev Corp St Sales Tax	C	Interest	L	T					
408. Suffolk County NY General Oblig 5% 10/15/26	A	Interest			Sold	02/22/24	K	A	

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
B =$1,001 - $2,500
C =$2,501 - $5,000
D =$5,001 - $15,000
E =$15,001 - $50,000
F =$50,001 - $100,000
G =$100,001 - $1,000,000
H1 =$1,000,001 - $5,000,000
H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
P1 =$1,000,001 - $5,000,000
P2 =$5,000,001 - $25,000,000
P3 =$25,000,001 - $50,000,000
P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
S =Assessment
T =Cash Market
U =Book Value
V =Other
W =Estimated

Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
409. Rensselaer BE 2125 8/1/2027	A	Interest			Sold	02/22/24	K	A	
410. NY Coupon 5% 8/1/2051	B	Interest	L	T	Buy	02/22/24	L		
411. Triborough bridge & tunnel NY Sales 4% coupon 5/15/2054	D	Interest	N	T	Buy	02/22/24	M		
412.					Buy (add'l)	07/10/24	M		
413. NYC Transitional Fin Auth 4.375% 5/1/2053	D	Interest	L	T	Buy	02/22/24	M		
414. NYS Urban Dev Corp 5% 3/15/2054	C	Interest	L	T	Buy	02/22/24	L		
415. Enovix Corporation	A	Dividend	J	T	Buy	07/17/24	J		
416. Fidelity Nasdaq Index	A	Dividend	J	T	Buy	07/11/24	K		
417. United Kingdom Pounds	A	Interest	J	T	Buy	11/04/24	J		
418. Chevron Corp	A	Dividend	J	T	Buy	02/15/24	J		
419. Royalty Pharma PLC Class A	A	Dividend	J	T	Buy	02/15/24	J		
420. Boeing Inc	A	Dividend	J	T	Buy	02/15/24	J		
421.					Buy (add'l)	03/25/24	J		
422.					Buy (add'l)	06/04/24	J		
423. Super Micro Computer Inc	A	Dividend	J	T	Buy	07/09/24	J		
424. Ishares Semiconductor ETF	A	Dividend	J	T	Buy	07/09/24	J		
425. M&T Bank	A	Dividend	J	T	Buy	02/29/24	J		

1. Income Gain Codes: (See Columns B1 and D4)
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B =$1,001 - $2,500
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Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
426. Federated Hermes Govt Oblig	A	Dividend	J	T	Buy	02/29/24	K		
427.					Sold (part)	05/08/24	J	A	
428.					Sold (part)	07/26/24	J	A	
429.					Sold (part)	10/16/24	J	A	
430.					Buy (add'l)	12/13/24	M		
431. Paramount Global	A	Dividend			Sold	06/04/24	J	A	
432. Occidental Petroleum Corp	A	Dividend	J	T	Buy	02/15/24	J		
433. Inspire Medical Systems Inc	A	Dividend			Buy	03/25/24	J		
434.					Sold	04/17/24	J	A	
435. US Treasury bill 5.23% 6/27/24	A	Interest			Buy	03/25/24	M		
436.					Redeemed	06/27/24	M	A	
437. US Treasury Bill 11/29/2024	A	Interest			Buy	08/29/24	M		
438.					Redeemed	11/29/24	M	A	
439. Bio-techne Corp	A	Dividend	J	T					
440. Embecta Corp	A	Dividend			Sold	02/15/24	J	A	
441. Pros Holding Inc	A	Dividend			Sold	02/15/24	J	A	
442. International Flavors & Fragrance	A	Dividend			Sold	03/25/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
443. Vestis Corp	A	Dividend			Sold	05/08/24	J	A	
444. Veralto Corp	A	Dividend			Sold	05/08/24	J	A	
445.									

1. Income Gain Codes: (See Columns B1 and D4) A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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3. Value Method Codes (See Column C2) Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

The 2022 report mistakenly had the following stocks as completely sold when they were not.

Line 439 - Bio-Techne Corp

Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2025

IX. CERTIFICATION.

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. app. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Richard M. Berman

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 104)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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One Columbus Circle, N.E.
Washington, D.C. 20544