Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Bulsara, Sanket
U.S. District Court - New York Eastern
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/ Bulsara, Sanket [electronically signed on Jun 25, 2026 10:51am by Bulsara, Sanket in JEFS]
/s/ Bulsara, Sanket [electronically signed on Jun 15, 2026 6:40pm by Bulsara, Sanket in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	St. John's University	University/College	Adjunct Professor

II. Agreements

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

III A. Filer Non-Investment Income

	SOURCE	INCOME TYPE	INCOME AMOUNT	HONORARIUM DATE
1.	St. John's University	Salary	$8,000.00	

III B. Spouse Non-Investment Income

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	SUNY Stonybrook	Salary	No	$0.00	

IV. Reimbursements

	SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	Harvard Law School	Sep 1, 2025	Sep 6, 2025	Cambridge, MA	Teach Trial Advocacy	Transportation, meals, lodging

Additional Explanation: There is no position or income related to this entry.

V. Gifts

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

VI. Liabilities

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

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**(H) Individual Assets**				
1-A.	Ledyard National Bank (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
1-B.	U.S. Savings Bonds, Series I		None	$15,001 - $50,000	Cash/Market
1-C.	Guardian Whole Life	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
	Additional Explanation: Whole Life, Paid Up at Age 99				
1-D.	Citibank, N.A. (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
1-E.	[redacted]	$50,001 - $100,000	Distribution	$500,001 - $1,000,000	Book Value
2.	**(H) Account #1**				
2-A.	Dreyfus Bank Ins Dep Account (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
2-B.	Blackrock ETF Trus Equity Factor (DYNF)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Sep 16, 2025	$15,001 - $50,000

2-C.	Blackrock ETF TR Ishares AI Innovation & Tech Active ETF (BAI)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 16, 2025	$15,001 - $50,000

2-D.	Blackrock ETF TR Ishares Thematic Rotation Active ETF (THRO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,001 - $50,000

2-E.	iShares Gold Tr iShares New (IAU)	$1,000 or less	Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,000 or less

2-F.	IShares Tr S&P 100 ETF (OEF)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,001 - $50,000

2-G.	iShares TR Core S&P 500 ETF (IVV)	$15,001 - $50,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,001 - $50,000
(2).	Sold (part)	May 20, 2025	$50,001 - $100,000

2-H.	iShares TR S&P 500 Growth ETF (IVW)	$2,501 - $5,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	May 20, 2025	$15,000 or less
(2).	Sold (part)	Sep 16, 2025	$15,000 or less

2-I. iShares Tr S&P 500 Value ETF (IVE) — $1,001 - $2,500 — Dividend — $100,001 - $250,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,000 or less
(4).	Buy (add'l)	Nov 18, 2025	$15,001 - $50,000

2-J. Ishares Tr US Technology ETF (IYW) — $5,001 - $15,000 — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	May 20, 2025	$15,000 or less
(2).	Sold	Sep 16, 2025	$15,001 - $50,000

2-K. Ishares Tr MBS ETF (MBB) — $1,000 or less — Dividend,Gain — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less

2-L. Ishares TR 10-20 Year Treasury Bond ETF (TLH) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,000 or less
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,000 or less

2-M. Ishares TR US Aerospace & Defense ETF (ITA) — None — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 16, 2025	$15,001 - $50,000

2-N. Ishares Tr MCSI EAFE Value ETF (EFV) — $5,001 - $15,000 — Dividend,Gain — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Buy (add'l)	May 20, 2025	$15,001 - $50,000
(3).	Sold (part)	Sep 16, 2025	$15,001 - $50,000
(4).	Sold (part)	Nov 18, 2025	$15,000 or less

2-O. Ishares Tr MSCI EAFE Growth ETF (EFG) — $5,001 - $15,000 — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,001 - $50,000
(2).	Sold (part)	Sep 16, 2025	$15,001 - $50,000
(3).	Sold	Nov 18, 2025	$15,000 or less

2-P. Ishares TR MSCI Quality Factor ETF (QUAL) — $15,001 - $50,000 — Dividend,Gain — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	Sep 16, 2025	$15,000 or less
(3).	Sold (part)	Nov 18, 2025	$15,001 - $50,000

2-Q. iShares Tr MSCI USA Momentum Factor ETF (MTUM) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Nov 18, 2025	$15,000 or less

2-R. Ishares Inc Core MSCI Emerging Mkts ETF (IEMG) — $1,001 - $2,500 — Dividend — $50,001 - $100,000 — Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(2).	Buy (add'l)	May 20, 2025	$15,001 - $50,000
(3).	Buy (add'l)	Sep 16, 2025	$15,000 or less
(4).	Buy (add'l)	Nov 18, 2025	$15,001 - $50,000

2-S.	iShares Inc MSCI Emerging Mkts Ex (EMXC)	$1,001 - $2,500	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Sold	May 20, 2025	$15,001 - $50,000

2-T.	Ishares Tr Core Total USD BD MKT ETF (IUSB)	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	May 20, 2025	$15,000 or less
(2).	Sold (part)	Sep 16, 2025	$15,001 - $50,000
(3).	Sold (part)	Nov 18, 2025	$15,000 or less

2-U.	Ishares TR US Infrastructure ETF (IFRA)	$1,001 - $2,500	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 27, 2025	$15,000 or less

2-V.	Ishares Tr Currency Hedged MSCI EAFE ETF (HEFA)	$1,000 or less	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,000 or less
(2).	Sold	May 20, 2025	$15,000 or less

2-W.	Ishares Tr Core Int Aggregate BD ETF (IAGG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,001 - $50,000

2-X.	Ishares TR 20+ Year Treasury Bond ETF (TLT)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 27, 2025	$15,000 or less

3.	**(H) Account #2**				
3-A.	Blackrock ETF Trus Equity Factor (DYNF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-B.	Blackrock ETF TR Ishares Innovation & Tech Active ETF (BAI)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-C.	Blackrock ETF TR Ishares Thematic Rotation Active ETF (THRO)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,000 or less

3-D.	Ishares TR S&P 100 ETF (OEF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 16, 2025	$15,000 or less

3-E.	Ishares Tr Core S&P 500 ETF (IVV)	$1,001 - $2,500	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$15,000 or less

3-F.	iShares Tr S&P 500 Growth ETF (IVW)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-G.	iShares Tr S&P 500 Value ETF (IVE)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Nov 18, 2025	$15,000 or less

3-H.	Ishares TR 10-20 Year Treasury Bond ETF (TLH)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
3-I.	Ishares TR MSCI EAFE Value EFT (EFV)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	May 20, 2025	$15,000 or less
(2).	Sold (part)	Sep 16, 2025	$15,000 or less

3-J.	Ishares Tr MSCI EAFE Growth ETF (EFG)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Sold	Sep 16, 2025	$15,000 or less

3-K.	Ishares TR MSCI Quality Factor ETF (QUAL)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Nov 18, 2025	$15,000 or less

3-L.	iShares Tr MSCI USA Momentum Factor ETF (MTUM)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-M.	Ishares Inc Core MSCI Emerging Mkts ETF (IEMG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,000 or less

3-N.	Ishares Tr Core Total USD Bd Mkt ETF (IUSB)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-O.	iShares Inc MSCI Emerging Mkts Ex (EMXC)	$1,000 or less	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	May 20, 2025	$15,000 or less

3-P.	Ishares Gold TR (IAU)		None	$15,000 or less	Cash/Market
3-Q.	Ishares Tr US Technology ETF (IYW)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Sep 16, 2025	$15,000 or less

4.	**(H) Account #3**				
4-A.	Blackrock ETF TR US Equity Factor (DYNF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Sep 16, 2025	$15,000 or less

4-B.	Blackrock ETF TR Ishares Innovation & Tech Active ETF (BAI)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 16, 2025	$15,000 or less

4-C.	Blackrock ETF TR Ishares Thematic Rotation Active ETF (THRO)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,000 or less

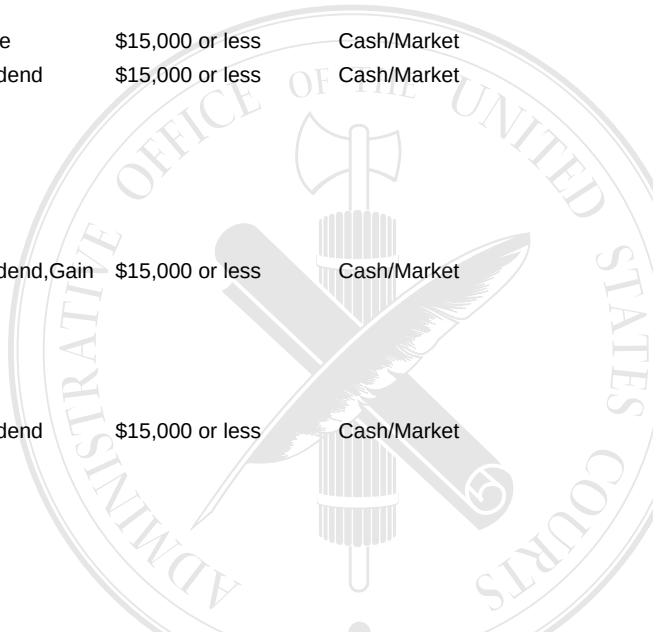
4-D.	Ishares Gold TR (IAU)		None	$15,000 or less	Cash/Market
4-E.	iShares S&P 100 ETF (OEF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,000 or less
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,000 or less

4-F.	iShares TR Core S&P 500 ETF (IVV)	$2,501 - $5,000	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$15,000 or less

4-G.	Ishares TR S&P 500 Value ETF (IVE)	$1,000 or less	Dividend	$15,000 or less	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Feb 27, 2025 $15,000 or less				
	(2). Buy (add'l) May 20, 2025 $15,000 or less				
	(3). Buy (add'l) Nov 18, 2025 $15,000 or less				
4-H.	iShares TR S&P 500 Growth ETF (IVW)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-I.	iShares TR US Technology ETF (IYW)	$1,001 - $2,500	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Sep 16, 2025 $15,000 or less				
4-J.	iShares Tr 10-20 Yr Treasury Bd ETF (TLH)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Feb 27, 2025 $15,000 or less				
	(2). Buy (add'l) Sep 16, 2025 $15,000 or less				
4-K.	iShares TR MCSI EAFE Value ETF (EFV)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Feb 27, 2025 $15,000 or less				
	(2). Buy (add'l) May 20, 2025 $15,000 or less				
	(3). Sold (part) Sep 16, 2025 $15,000 or less				
4-L.	iShares TR MSCI EAFE Growth ETF (EFG)	$1,000 or less	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Feb 27, 2025 $15,000 or less				
	(2). Sold Sep 16, 2025 $15,000 or less				
4-M.	iShares TR MSCI USA Quality Factor ETF (QUAL)	$1,001 - $2,500	Dividend,Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Feb 27, 2025 $15,000 or less				
	(2). Sold (part) Sep 16, 2025 $15,000 or less				
	(3). Sold (part) Nov 18, 2025 $15,000 or less				
4-N.	iShares Tr MSCI USA Momentum Factor ETF (MTUM)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-O.	iShares Inc Core MSCI Emerging Mkts (IEMG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Feb 27, 2025 $15,000 or less				
	(2). Buy (add'l) May 20, 2025 $15,000 or less				
	(3). Buy (add'l) Nov 18, 2025 $15,000 or less				
4-P.	iShares Inc Core MSCI Emrg. Markets Ex China (EMXC)	$1,000 or less	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 20, 2025 $15,000 or less				
4-Q.	iShares TR Core Total USD Bd Mkt ETF (IUSB)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Sep 16, 2025 $15,000 or less				
4-R.	iShares Tr Core Intl Aggregate Bond ETF (IAGG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy May 20, 2025 $15,000 or less				
4-S.	iShares Tr Currency Hedged MSCI (HEFA)	$1,000 or less	Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Feb 27, 2025 $15,000 or less				
	(2). Sold May 20, 2025 $15,000 or less				
4-T.	iShares Tr US Aerospace & Defense (ITA)		None	$15,000 or less	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 16, 2025	$15,000 or less

5. **(H) Account #4**

5-A.	TIAA Access Nuveen Lifecycle 2040 T1		None	$250,001 - $500,000	Cash/Market
5-B.	TIAA Access Nuveen Lifecycle 2050 T1		None	$15,000 or less	Cash/Market
5-C.	TIAA Access American EuroPC GR T1		None	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 14, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Jul 14, 2025	$15,000 or less
(3).	Buy (add'l)	Oct 1, 2025	$15,000 or less

5-D.	TIAA-Access Vanguard TotIntBd Ix T1		None	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 14, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 14, 2025	$15,000 or less
(3).	Buy (add'l)	Oct 1, 2025	$15,000 or less

5-E.	TIAA Vanguard EXT MKT IX T1		None	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 14, 2025	$15,001 - $50,000
(2).	Sold (part)	Jul 14, 2025	$15,000 or less
(3).	Sold (part)	Oct 1, 2025	$15,000 or less
(4).	Sold (part)	Oct 15, 2025	$15,000 or less

5-F.	TIAA Traditional Annuity (fixed)	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market

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

6. **(H) Account #5**

6-A.	TIAA Traditional	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 14, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 14, 2025	$15,000 or less
(3).	Buy (add'l)	Oct 1, 2025	$15,000 or less

6-B.	TIAA Real Estate		None	$15,000 or less	Cash/Market
6-C.	CREF Core Bond Market R3		None	$15,000 or less	Cash/Market
6-D.	CREF Total Global Stock R3		None	$15,000 or less	Cash/Market
6-E.	CREF Growth R3		None	$15,001 - $50,000	Cash/Market
6-F.	CREF S&P 500 Index R3		None	$15,000 or less	Cash/Market
6-G.	CREF Global Equities R3		None	$15,000 or less	Cash/Market
6-H.	TIAA Access Nuveen Lifecycle 2040 T1		None	$250,001 - $500,000	Cash/Market
6-I.	TIAA Access Nuveen International Equity Instl		None	$15,000 or less	Cash/Market
6-J.	TIAA Access MFS Mid Cap Growth Fund T1		None	$15,000 or less	Cash/Market
6-K.	TIAA Access Vanguard Inst Ix Pl T1		None	$15,001 - $50,000	Cash/Market
6-L.	TIAA Vanguard Extend MKT Index Inst Pl	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 14, 2025	$15,001 - $50,000
(2).	Sold (part)	Jul 14, 2025	$15,000 or less
(3).	Sold (part)	Oct 1, 2025	$15,000 or less

6-M.	TIAA American EuroPac GRW R6	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 14, 2025 $15,001 - $50,000				
	(2). Sold (part) Oct 1, 2025 $15,000 or less				
6-N.	TIAA Vanguard Total Intl Bond Indx Ins	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Apr 14, 2025 $15,000 or less				
	(2). Buy (add'l) Jul 14, 2025 $15,000 or less				
7.	**(H) Account #6**				
7-A.	TIAA Traditional	$1,000 or less	Interest	$15,000 or less	Cash/Market
7-B.	TIAA Real Estate		None	$15,000 or less	Cash/Market
7-C.	Nuveen Core Plus Bond Instl	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-D.	Nuveen Infl-Lnkd Bond-Inst	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-E.	iShares MSCI Int Ix K	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 14, 2025 $15,000 or less				
7-F.	Schwab Small Cap Index	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-G.	State Street Eq 500 Idx K	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8.	**(H) Account #7**				
8-A.	TIAA Traditional	$1,000 or less	Interest	$15,000 or less	Cash/Market
8-B.	TIAA Real Estate		None	$15,000 or less	Cash/Market
8-C.	CREF Total Global Stock R2		None	$15,000 or less	Cash/Market
8-D.	CREF Growth R2		None	$15,000 or less	Cash/Market
8-E.	CREF S&P 500 Index R2		None	$15,000 or less	Cash/Market
8-F.	CREF Global Equities R2		None	$15,000 or less	Cash/Market
8-G.	iShares MSCI Int Ix K	$1,000 or less	Dividend	$15,000 or less	Cash/Market
8-H.	Schwab Small Cap Index	$1,000 or less	Dividend	$15,000 or less	Cash/Market
9.	**(H) Account #8**				
9-A.	Dreyfus Bank Ins Dep Account (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
9-B.	Blackrock ETF TRII Flexible (BINC)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 11, 2025 $15,000 or less				
	(2). Buy (add'l) Sep 16, 2025 $15,000 or less				
9-C.	Blackrock ETF Tr iShares AI Innovation & Tech (BAI)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy May 20, 2025 $15,000 or less				
	(2). Buy (add'l) Sep 16, 2025 $15,000 or less				
9-D.	Blackrock ETF Tr iShares US Thematic Rotation (THRO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
9-E.	iShares Gold TR Ishares New (IAU)	$1,000 or less	Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Feb 27, 2025 $15,000 or less				
	(2). Sold (part) Apr 11, 2025 $15,000 or less				
	(3). Sold (part) May 20, 2025 $15,000 or less				
	(4). Buy (add'l) Sep 16, 2025 $15,000 or less				
9-F.	iShares S&P 100 ETF (OEF)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

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DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,000 or less
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,001 - $50,000

9-G. iShares TR Core S&P 500 ETF (IVV) — $15,001 - $50,000 — Dividend,Gain — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$15,001 - $50,000
(3).	Sold (part)	Aug 1, 2025	$15,000 or less
(4).	Buy (add'l)	Sep 16, 2025	$15,000 or less

9-H. iShares TR S&P 500 Growth ETF (IVW) — $1,001 - $2,500 — Dividend,Gain — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	May 20, 2025	$15,000 or less
(2).	Sold (part)	Aug 1, 2025	$15,000 or less

9-I. Ishares TR S&P 500 Value ETF (IVE) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(2).	Buy (add'l)	Nov 18, 2025	$15,000 or less

9-J. iShares TR 20+ Year Treasury Bond ETF (TLT) — $1,000 or less — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 27, 2025	$15,000 or less

9-K. iShares TR US Technology ETF (IYW) — $5,001 - $15,000 — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Aug 1, 2025	$15,000 or less
(2).	Sold	Sep 16, 2025	$15,000 or less

9-L. iShares TR JPMorgan USD Emerging Mkts BD (EMB) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,000 or less

9-M. iShares TR MBS ETF (MBB) — $1,001 - $2,500 — Dividend,Gain — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	Apr 11, 2025	$15,000 or less
(3).	Buy (add'l)	May 20, 2025	$15,000 or less

9-N. iShares Tr 10-20 Yr Treasury Bond ETF (TLH) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,000 or less

9-O. iShares Tr US Aerospace & Defense (ITA) — None — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 16, 2025	$15,000 or less

9-P. iShares TR MSCI Eafe Value ETF (EFV) — $2,501 - $5,000 — Dividend,Gain — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	Apr 11, 2025	$15,000 or less
(3).	Buy (add'l)	May 20, 2025	$15,000 or less
(4).	Sold (part)	Sep 16, 2025	$15,000 or less
(5).	Sold (part)	Nov 18, 2025	$15,000 or less



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
9-Q.	iShares TR MSCI EAFE Growth ETF (EFG)	$2,501 - $5,000	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Sold	Sep 16, 2025	$15,001 - $50,000

9-R.	iShares TR MSCI Momentum Factor (MTUM)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Nov 18, 2025	$15,000 or less

9-S.	iShares Inc MSCI Emerging Mkts Ex (EMXC)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Sold	May 20, 2025	$15,000 or less

9-T.	iShares Tr Currency Hedged MSCI (HEFA)	$1,000 or less	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,000 or less
(2).	Sold	May 20, 2025	$15,000 or less

9-U.	iShares TR US Infrastructure ETF (IFRA)	$1,001 - $2,500	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 27, 2025	$15,000 or less

9-V.	iShares Tr Core Intl Aggregate Bond ETF (IAGG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,000 or less

9-W.	Blackrock ETF TR US Equity (DYNF)	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Aug 1, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 16, 2025	$15,000 or less

9-X.	iShares Inc Core MSCI Emerging Mkts (IEMG)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,000 or less
(4).	Buy (add'l)	Nov 18, 2025	$15,000 or less

9-Y.	iShares TR MSCI USA Quality Factor ETF (QUAL)	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	Aug 1, 2025	$15,000 or less
(3).	Sold (part)	Sep 16, 2025	$15,000 or less
(4).	Sold (part)	Nov 18, 2025	$15,000 or less

9-Z.	iShares TR Core Total USD Bd Mkt ETF (IUSB)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 11, 2025	$15,000 or less
(2).	Sold (part)	Sep 16, 2025	$15,000 or less
(3).	Sold (part)	Nov 18, 2025	$15,000 or less

VIII. Additional Information or Explanations

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



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