**Annual, 2025**

## Financial Disclosure Report (AO Form 10)

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**Filer's Information**
**Calvert, Victoria M.**
U.S. District Court - Georgia Northern
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/ Calvert, Victoria M. [electronically signed on Jul 1, 2026 9:22pm by Calvert, Victoria M. in JEFS]**
**/s/ Calvert, Victoria M. [electronically signed on Jun 26, 2026 1:14pm by Calvert, Victoria M. in JEFS]**

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### I. Positions

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

### 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. | Self-Employed Attorney | | | $0.00 | |

### IV. Reimbursements

| | SOURCE OF REIMBURSEMENT | FROM DATE | TO DATE | LOCATION | PURPOSE | ITEMS PAID OR PROVIDED |
|---|---|---|---|---|---|---|
| 1. | Federal Judges Association | Apr 3, 2025 | Apr 4, 2025 | Philadelphia, PA | Board Meeting | Airfare, Ubers, lodging & meals |
| 2. | Law & Economics Center | Oct 19, 2025 | Oct 24, 2025 | Arlington, VA | Seminar | Airfare, lodging, Uber, and meals |

## 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

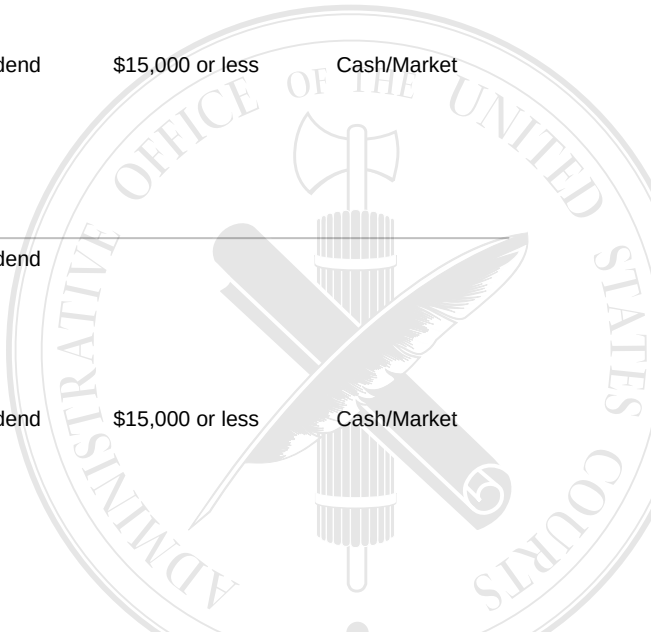
| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 1. | **(H) IRA #1 (H)** | | | | |
| 1-A. | - Vanguard World Fund ESG Intl Stk ETF (VSGX) | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 1-B. | - Vanguard World Fund ESG US STK ETF (ESGV) | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Apr 8, 2025 $15,000 or less | | | | |
| 1-C. | - iShares TR ESG AWR USD ETF (SUSC) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 1-D. | - iShares TR ESG AWR US AGRGT (EAGG) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 2. | **(H) Roth IRA #1 (H)** | | | | |
| 2-A. | - iShares Russell 2000 Value ETF (IWN) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Aug 29, 2025 $15,000 or less | | | | |
| | (2). Sold Dec 1, 2025 $15,000 or less | | | | |
| 2-B. | -iShares Core S&P US Growth ETF (IUSG) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-C. | - iShares MSCI USA QLT FCT (QUAL) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-D. | - Vanguard Balanced Index FDS Total Bnd Mrkt (BND) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-E. | - Vanguard Index FDS Vanguard Total STK (VTI) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-F. | - Vanguard Index FDS Vanguard Value fka Vanguard Value ETF (VTV) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jul 23, 2025 $15,000 or less | | | | |
| 2-G. | - Vanguard Intl Equity Index FDS FTSE EMR (VWO) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-H. | - Vanguard Developed Markets Index Fund (VEA) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Apr 1, 2025 $15,000 or less | | | | |
| 2-I. | - Vanguard Mega Cap Growth Index Fund (MGK) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-J. | - Vanguard Scottsdale Funds Vanguard aka Vanguard Intermediate (VCIT) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-K. | - iShares TR 3 7 YR Treas Bd (IEI) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-L. | - iShares TR EAFE Growth ETF (EFG) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Apr 1, 2025 $15,000 or less | | | | |
| 2-M. | - SPDR Mid Cap ETF (SPMD) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 9, 2025 $15,000 or less | | | | |
| 2-N. | - iShares EMR MRK CHNA (EMXC) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |

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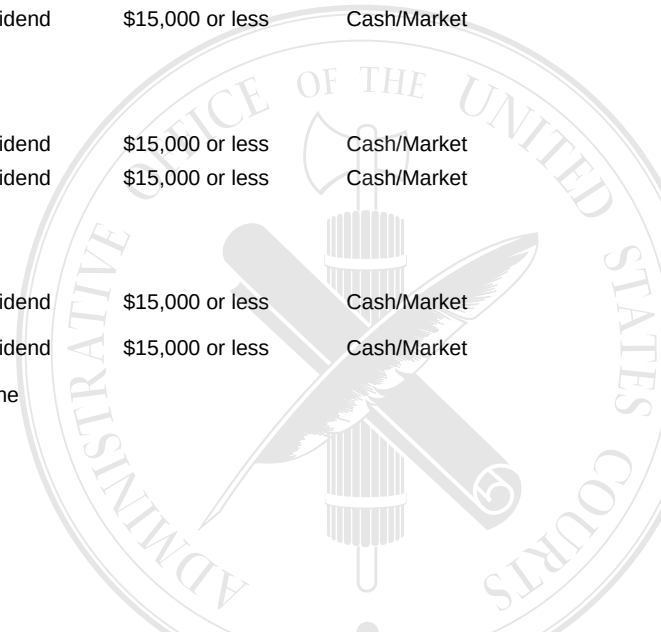
| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Dec 2, 2025 $15,000 or less | | | | |
| 3. | **(H) 401(k) Account (H)** | | | | |
| 3-A. | - JPMorgan Equity Income Fund Class R6 | $5,001 - $15,000 | Dividend | $50,001 - $100,000 | Cash/Market |
| 3-B. | - Fidelity 500 Index Fund | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| 3-C. | - Janus Henderson Triton Fund Class | $1,001 - $2,500 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Dec 4, 2025 $15,001 - $50,000 | | | | |
| 3-D. | - American Funds New World Fund Class R-6 | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 3-E. | - Carillon Eagle Mid Cap Growth Fund R6 | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 3-F. | - Fidelity Real Estate Index | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-G. | - Columbia Overseas Value Fund I3 | $2,501 - $5,000 | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Exchange Jul 3, 2025 $15,000 or less | | | | |
| 3-H. | - Fidelity Intm Tr BD Idx | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Exchange Jul 3, 2025 $15,000 or less | | | | |
| 3-I. | - Fidelity Strategic Income | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-J. | - Fidelity Blue Chip Group K6 | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 3-K. | - JPM Core Bond R6 | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-L. | - Fidelity Intl Index | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 3-M. | - Fidelity Freedom 2045 | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 3-N. | - Janus Henderson Triton N Fund | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Exchange Dec 4, 2025 $15,001 - $50,000 | | | | |
| 4. | **(H) (H) Brokerage Account** | | | | |
| 4-A. | - Vanguard Total Stock Market ETF | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jan 8, 2025 $15,000 or less | | | | |
| | (2). Buy (add'l) Jan 17, 2025 $15,000 or less | | | | |
| 4-B. | - Vanguard FTSE Developed Markets ETF | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 31, 2025 $15,000 or less | | | | |
| 4-C. | - iShares Core MSCI EAFE ETF | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-D. | - iShares Russell 2000 Value ETF | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Dec 1, 2025 $15,000 or less | | | | |
| 4-E. | - iShares Core S&P US Growth ETF | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jan 17, 2025 $15,000 or less | | | | |
| 4-F. | - iShares MSCI USA Quality Factor ETF | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-G. | - iShares MSCI EAFE Growth ETF | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Mar 31, 2025 $15,000 or less | | | | |
| | (2). Sold Dec 12, 2025 $15,000 or less | | | | |
| 4-H. | - Vanguard Value ETF | $1,000 or less | Dividend | $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). Sold (part) Jan 17, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Jul 22, 2025 $15,000 or less | | | | |
| 4-I. | - Vanguard FTSE Emerging Markets | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-J. | - Vanguard Mega Cap Growth | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-K. | - iShares National Muni Bond | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Jan 17, 2025 $15,000 or less | | | | |
| 4-L. | - SPDR Portfolio S&P 400 Mid Cap | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 8, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Apr 7, 2025 $15,000 or less | | | | |
| 4-M. | - Vanguard Mid Cap | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 7, 2025 $15,000 or less | | | | |
| 4-N. | - iShares MSCI Emerging Markets exChina | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Dec 12, 2025 $15,000 or less | | | | |
| 4-O. | - SPDR Portfolio S&P 1500 Composite Stock ETF | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 8, 2025 $15,000 or less | | | | |
| 4-P. | - Schwab US Broad Market ETF | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Feb 14, 2025 $15,000 or less | | | | |
| 4-Q. | - SPDR S&P 600 Small CapValue ETF | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 11, 2025 $15,000 or less | | | | |
| 4-R. | - Schwab US Large Cap Growth | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 11, 2025 $15,000 or less | | | | |
| 4-S. | - SPDR Portfolio Developed Wld ex-US | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Dec 23, 2025 $15,000 or less | | | | |
| 4-T. | - SPDR S&P 500 Value ETF | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jul 22, 2025 $15,000 or less | | | | |
| 4-U. | - Vanguard Muni Bond Tax Exempt | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Sep 12, 2025 $15,000 or less | | | | |
| 5. | **(H) IRA #2 (H)** | | | | |
| 5-A. | - iShares Russell 2000 Value ETF (IWN) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jan 8, 2025 $15,000 or less | | | | |
| | (2). Sold Dec 2, 2025 $15,000 or less | | | | |
| 5-B. | - iShares Core S&P US Growth ETF (IUSG) | $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). Sold (part) Jan 8, 2025 $15,000 or less | | | | |
| 5-C. | - iShares TR MSCI USA QLT FCT (QUAL) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-D. | - Vanguard Balanced Index FDS Total Bond Market (BND) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-E. | - Vanguard Index FDS Vanguard Value (VTV) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jul 22, 2025 $15,000 or less | | | | |
| 5-F. | - Vanguard Intl Equity Index FDS FTSE EMR (VWO) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-G. | - Vanguard Developed Markets Index Fund (VEA) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 31, 2025 $15,000 or less | | | | |
| | (2). Buy (add'l) Jul 22, 2025 $15,000 or less | | | | |
| 5-H. | - iShares 3-7 Year Treasury Bond (IEI) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-I. | - Vanguard Scottsdale Funds Vanguard aka Vanguard Intermediate (VCIT) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-J. | - Vanguard Index FDS Vanguard Total STK (VTI) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 5-K. | - Vanguard Mega Cap Growth Index Fund (MGK) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-L. | - iShares TR EAFE Growth ETF (EFG) | | None | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Mar 31, 2025 $15,000 or less | | | | |
| 5-M. | - SPDR Mid Cap ETF (SPMD) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 8, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Dec 1, 2025 $15,000 or less | | | | |
| 5-N. | - iShares EMR MRK CHNA (EMXC) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Dec 1, 2025 $15,000 or less | | | | |
| 5-O. | - Vanguard Scottsdale Long-Term (VGLT) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6. | **(H) Roth IRA #2 (H)** | | | | |
| 6-A. | - iShares Russell 2000 Value ETF (IWN) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Dec 1, 2025 $15,000 or less | | | | |
| 6-B. | - iShares TR MSCI USA QLT FCT (QUAL) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6-C. | - iShares Core S&P US Growth ETF (IUSG) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6-D. | - Vanguard Balanced Index FDS Total Bond Market (BND) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6-E. | - Vanguard Index FDS Vanguard Value (VTV) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jul 23, 2025 $15,000 or less | | | | |
| 6-F. | - Vanguard Intl Equity Index FDS FTSE EMR (VWO) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6-G. | - Vanguard Developed Markets Index Fund (VEA) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Apr 1, 2025 $15,000 or less | | | | |
| 6-H. | - iShares 3-7 Year Treasury Bond (IEI) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6-I. | - Vanguard Scottsdale Funds fka Vanguard Intermed (VCIT) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6-J. | - iShares TR EAFE Grwth ETF (EFG) | | None | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Apr 1, 2025 $15,000 or less | | | | |



| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 6-K. | - Vanguard Index FDS Vanguard Total STK (VTI) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6-L. | - Vanguard Mega Cap Growth Index Fund (MGK) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6-M. | - SPDR Mid Cap ETF (SPMD) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6-N. | - iShares EMR MRK CHNA (EMXC) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Dec 2, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 6-O. | - Vanguard Scottsdale Long-Term (VGLT) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |

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

| | | | | | |
|---|---|---|---|---|---|
| 7. | **(H) Defined Contribution Plan (H)** | | | | |
| 7-A. | - BlackRock Total Return Fund | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 7-B. | - Janus Henderson Venture Fund | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 7-C. | - MassMutual Blue Chip Growth Fund | $2,501 - $5,000 | Dividend | $15,000 or less | Cash/Market |
| 7-D. | - MassMutual Mid Cap Growth Fund | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 7-E. | - MFS Value Fund | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 7-F. | - American Funds New Perspective R6 | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 7-G. | - Vanguard Real Estate Index Admiral | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 7-H. | - American Century Small Cap Value R6 | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 7-I. | - Invesco Small Cap Value | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 7-J. | - Vanguard Small Cap Index Admiral | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 7-K. | - AmCent Mid Cap Value | | None | $15,000 or less | Cash/Market |
| 7-L. | - Vanguard Mid Cap Index Fund - Admiral | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 7-M. | - Vanguard Growth Index Admiral | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 7-N. | - Vanguard Institutional Index Instl P1 | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 7-O. | - Vanguard Value Index | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 7-P. | - JP Morgan Covernment Bond | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 7-Q. | - SAGIC Diversified Bond | | None | $15,000 or less | Cash/Market |
| 7-R. | - Capital Group EuroPacific Growth SA | | None | $15,000 or less | Cash/Market |
| 7-S. | - Vanguard Emerging Mkts Stock Idx Adm (X) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 8. | **(H) 457(b) Plan (H)** | | | | |
| 8-A. | - Vanguard Target Retirement 2040 Fund | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 9. | **(H) SEP IRA #1 (H)** | | | | |
| 9-A. | - iShares Russell 2000 Value ETF (IWN) | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jan 9, 2025 | $15,000 or less |
| (2). | Buy (add'l) | Apr 23, 2025 | $15,000 or less |
| (3). | Sold | Dec 2, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 9-B. | - iShares Core S&P US Growth ETF (IUSG) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jan 9, 2025 | $15,000 or less |
| (2). | Buy (add'l) | Apr 23, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 9-C. | - iShares TR MSCI USA QLT FCT (QUAL) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Apr 23, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 9-D. | - Vanguard Developed Markets Index Fund (VEA) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Apr 1, 2025 | $15,000 or less |
| (2). | Buy (add'l) | Apr 23, 2025 | $15,000 or less |
| (3). | Buy (add'l) | Jul 23, 2025 | $15,000 or less |

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| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 9-E. | - Vanguard Intl Equity Index FDS FTSE EMR (VWO) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Apr 23, 2025 $15,000 or less | | | | |
| | (2). Buy (add'l) Jul 23, 2025 $15,000 or less | | | | |
| 9-F. | - Vanguard Index FDS Vanguard Value (VTV) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Apr 23, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Jul 23, 2025 $15,000 or less | | | | |
| 9-G. | - Vanguard Index FDS Vanguard Total STK (VTI) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Apr 23, 2025 $15,000 or less | | | | |
| 9-H. | - Vanguard Balanced Index FDS Total Bond Market (BND) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Apr 23, 2025 $15,000 or less | | | | |
| 9-I. | - Vanguard Scottsdale Funds fka Vanguard Intermed (VCIT) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Apr 23, 2025 $15,000 or less | | | | |
| 9-J. | - iShares 3-7 Year Treasury Bond (IEI) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Apr 23, 2025 $15,000 or less | | | | |
| 9-K. | - iShares TR EAFE Grwth ETF (EFG) | | None | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Apr 1, 2025 $15,000 or less | | | | |
| 9-L. | - Vanguard Mega Cap Growth Index Fund (MGK) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Apr 23, 2025 $15,000 or less | | | | |
| 9-M. | - SPDR Mid Cap ETF (SPMD) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 9, 2025 $15,000 or less | | | | |
| | (2). Buy (add'l) Apr 23, 2025 $15,000 or less | | | | |
| | (3). Sold (part) Dec 2, 2025 $15,000 or less | | | | |
| 9-N. | - Vanguard Scottsdale Long-Term (VGLT) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy May 5, 2025 $15,000 or less | | | | |
| 9-O. | - iShares EMR MRK CHNA (EMXC) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Dec 2, 2025 $15,000 or less | | | | |
| | (2). Buy (add'l) Dec 24, 2025 $15,000 or less | | | | |
| 10. | **(H) 529 Account #1 (H)** | | | | |
| 10-A. | - Connecticut Higher Education Trust 529 Port 2034 | | None | $15,001 - $50,000 | Cash/Market |
| 11. | **(H) 529 Account #2 (H)** | | | | |
| 11-A. | - Path2College 529 College Saving Plan 2032/2033 | | None | $50,001 - $100,000 | Cash/Market |
| 12. | **Bank of America Cash Accounts** | $1,000 or less | Interest | $500,001 - $1,000,000 | Cash/Market |

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| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 13. | **Flourish Savings Account** | $5,001 - $15,000 | Interest | $100,001 - $250,000 | Cash/Market |

## VIII. Additional Information or Explanations

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