AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 13101-13111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Donnelly, Ann M.	United States District Court, Eastern District of New York	08/13/2025
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**
United States District Judge - Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
United States District Court 225 Cadman Plaza East Brooklyn, NY 11201		

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 Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Member	Donnelly LLC (no reportable assets)
2.		
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements.)*

☐ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.	2015	NY State Pension Plan (defined benefit pension plan)
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

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

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.	2024	New York State Retirement System (pension)	$95,909.52
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
1.	2024	Ernst & Young (salary)
2.	2024	Citigroup (pension)
3.		
4.		

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

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☑ 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 Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

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

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable liabilities.)*

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

Name of Person Reporting	Date of Report
Donnelly, Ann M.	08/13/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
1. Individual Assets (H)									
2. Rental Property, Brooklyn, NY	E	Rent	O	W					
3. Account #1 (H)									
4. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	J	T	Sold (part)	02/21/24	J		
5.					Sold (part)	05/08/24	J		
6.					Buy (add'l)	07/03/24	J		
7.					Sold (part)	07/24/24	J		
8. Strategic Advisers Fidelity US TtlStk (FCTDX)	D	Dividend	M	T	Sold (part)	04/04/24	J		
9.					Sold (part)	06/25/24	J		
10.					Sold (part)	07/02/24	L		
11.					Buy (add'l)	07/23/24	L		
12.					Sold (part)	09/12/24	J		
13.					Sold (part)	10/15/24	J		
14.					Sold (part)	11/15/24	J		
15. Strategic Advisers Fidelity Em Mkts (FGOMX)	A	Dividend	J	T	Buy (add'l)	02/20/24	J		
16.					Buy (add'l)	06/25/24	J		
17.					Sold (part)	07/02/24	K		

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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Donnelly, Ann M.	08/13/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
18.					Buy (add'l)	07/23/24	J		
19.					Sold (part)	10/15/24	J		
20. Fidelity SAI Inflation-Focused (FIFGX)	A	Dividend	J	T	Buy (add'l)	07/02/24	K		
21.					Sold (part)	07/23/24	K		
22. Strategic Advisers Fidelity Core Inc (FIWGX)	C	Dividend	L	T	Sold (part)	01/16/24	J		
23.					Sold (part)	04/04/24	J		
24.					Sold (part)	06/25/24	J		
25.					Buy (add'l)	07/02/24	L		
26.					Sold (part)	07/23/24	K		
27.					Sold (part)	09/12/24	J		
28.					Sold (part)	11/15/24	J		
29. Fidelity SAI Canada Equity Index Fund (FSCJX)	A	Dividend	J	T	Buy	09/12/24	J		
30. Fidelity SAI Inflation Protected Bond (FSPWX)	A	Dividend	J	T	Buy	09/12/24	J		
31.					Buy (add'l)	10/15/24	J		
32.					Buy (add'l)	11/15/24	J		
33. Fidelity SAI Real Estate Fund (FSRJX)	A	Dividend	J	T	Buy	09/12/24	J		
34. Strategic Advisers Fidelity International Fund (FUSIX)	B	Dividend	L	T	Buy (add'l)	02/20/24	J		

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	
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35.					Buy (add'l)	05/07/24	J		
36.					Buy (add'l)	06/25/24	J		
37.					Buy (add'l)	07/02/24	J		
38.					Sold (part)	07/23/24	J		
39.					Buy (add'l)	11/15/24	J		
40. Fid Salem Street Trust - Fidelity SAI Short-Term Bond Fund (FZOMX)	A	Dividend	J	T	Buy (add'l)	04/04/24	J		
41.					Buy (add'l)	07/02/24	J		
42.					Buy (add'l)	10/15/24	J		
43. Fidelity SAI Emerging Markets Index (FERGX)		None			Sold	07/02/24	J		
44. Fidelity SAI High Income (FSHGX)	A	Dividend			Sold	07/02/24	J		
45. Fidelity SAI Low Duration Income Fund (FZOLX)	A	Dividend			Buy (add'l)	04/04/24	J		
46.					Buy (add'l)	07/02/24	J		
47.					Sold	07/23/24	J		
48. Fidelity SAI US Treasury Bond Index (FUTBX)	A	Dividend			Buy	01/16/24	J		
49.					Buy (add'l)	06/25/24	J		
50.					Sold	07/02/24	J		
51. Account #2 (H)									

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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52. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	B	Dividend	K	T	Buy (add'l)	01/17/24	J		
53.					Sold (part)	02/16/24	J		
54.					Sold (part)	02/21/24	L		
55.					Buy (add'l)	04/05/24	J		
56.					Sold (part)	05/08/24	K		
57.					Sold (part)	05/17/24	J		
58.					Buy (add'l)	06/26/24	J		
59.					Buy (add'l)	07/24/24	J		
60.					Sold (part)	08/09/24	J		
61.					Buy (add'l)	09/13/24	J		
62.					Buy (add'l)	10/16/24	J		
63.					Sold (part)	11/15/24	J		
64.					Sold (part)	11/18/24	J		
65.					Buy (add'l)	12/18/24	J		
66. Fidelity SAI Canada Equity Index Fund (FSCJX)	A	Dividend	K	T	Buy	09/12/24	J		
67.					Buy (add'l)	10/15/24	J		
68.					Buy (add'l)	11/15/24	J		

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69. Fidelity SAI High Income Fund (FSHGX)	A	Dividend	J	T	Buy (add'l)	02/20/24	J		
70.					Sold (part)	07/23/24	K		
71. Strategic Advisers Fidelity Em Mkts (FGOMX)	C	Dividend	M	T	Buy (add'l)	01/16/24	J		
72.					Buy (add'l)	02/20/24	K		
73.					Sold (part)	05/07/24	J		
74.					Buy (add'l)	06/25/24	J		
75.					Sold (part)	07/23/24	L		
76.					Buy (add'l)	09/12/24	J		
77.					Sold (part)	10/15/24	J		
78.					Buy (add'l)	11/15/24	J		
79. Strategic Advisers Fidelity International Fund (FUSIX)	E	Dividend	O	T	Buy (add'l)	01/16/24	J		
80.					Buy (add'l)	02/20/24	J		
81.					Sold (part)	04/04/24	J		
82.					Buy (add'l)	05/07/24	K		
83.					Buy (add'l)	06/25/24	J		
84.					Buy (add'l)	07/23/24	J		
85.					Buy (add'l)	11/15/24	K		

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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86. Strategic Advisers Fidelity US TtlStk (FCTDX)	F	Dividend	P1	T	Sold (part)	01/16/24	J		
87.					Sold (part)	04/04/24	J		
88.					Buy (add'l)	05/07/24	J		
89.					Sold (part)	06/25/24	J		
90.					Sold (part)	07/23/24	L		
91.					Sold (part)	09/12/24	J		
92.					Sold (part)	10/15/24	L		
93.					Sold (part)	11/15/24	L		
94. Fidelity Advisor Strategic Income Fund (FSRIX)	A	Dividend	J	T	Buy (add'l)	02/20/24	J		
95.					Sold (part)	09/12/24	J		
96. Fidelity SAI Inflation Protected Bond (FSPWX)	A	Dividend	L	T	Buy	09/12/24	J		
97.					Buy (add'l)	10/15/24	K		
98.					Buy (add'l)	11/15/24	K		
99. Fidelity SAI Inflation-Focused (FIFGX)	B	Dividend	K	T	Buy (add'l)	01/16/24	J		
100.					Buy (add'l)	02/20/24	J		
101.					Sold (part)	04/04/24	J		
102.					Buy (add'l)	05/07/24	J		

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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
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103.					Sold (part)	06/25/24	J		
104.					Buy (add'l)	07/23/24	K		
105.					Sold (part)	09/12/24	J		
106. Fidelity SAI Short-Term Bond Fund (FZOMX)	B	Dividend	K	T	Buy (add'l)	01/16/24	J		
107.					Sold (part)	02/20/24	J		
108.					Buy (add'l)	04/04/24	J		
109.					Buy (add'l)	07/23/24	J		
110.					Buy (add'l)	10/15/24	J		
111. Fidelity SAI Real Estate Fund (FSRJX)	A	Dividend	K	T	Buy	09/12/24	K		
112.					Buy (add'l)	10/15/24	J		
113.					Buy (add'l)	11/15/24	J		
114. Strategic Advisers Fidelity Core Income Fund (FIWGX)	E	Dividend	O	T	Sold (part)	01/16/24	K		
115.					Sold (part)	02/20/24	J		
116.					Sold (part)	04/04/24	K		
117.					Buy (add'l)	05/07/24	J		
118.					Sold (part)	06/25/24	K		
119.					Buy (add'l)	07/23/24	M		

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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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
120.					Sold (part)	09/12/24	K		
121.					Buy (add'l)	10/15/24	J		
122.					Sold (part)	11/15/24	J		
123. Fidelity SAI Low Duration Income Fund (FZOLX)	B	Dividend	K	T	Buy (add'l)	04/04/24	K		
124.					Sold (part)	05/07/24	J		
125.					Buy (add'l)	06/25/24	J		
126.					Sold (part)	09/12/24	J		
127.					Sold (part)	11/15/24	J		
128. Fidelity SAI Long-Term Treasury Bond Index Fund (FBLTX)	A	Dividend			Sold	01/16/24	J		
129. Fidelity SAI Emerging Markets Index (FERGX)		None			Buy (add'l)	02/20/24	J		
130.					Sold	07/23/24	K		
131. Fidelity Capital & Income Fund (FAGIX)	A	Dividend			Sold	09/12/24	J		
132. Fidelity SAI US Treasury Bond Index (FUTBX)	A	Dividend			Buy	01/16/24	J		
133.					Buy (add'l)	02/20/24	J		
134.					Sold (part)	05/07/24	J		
135.					Buy (add'l)	06/25/24	J		
136.					Sold (part)	07/23/24	J		

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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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
137.					Sold (part)	09/12/24	J		
138.					Sold	10/15/24	K		
139. Account #3 (H)									
140. Dodge & Cox Stock X (DOXGX)		None	J	T					
141. TRP New Horizons I (PRNHX)		None	J	T					
142. American Funds New Perspective R6 World (RNPGX)		None	J	T					
143. FID GR Co Pool CL 2		None	K	T					
144. PIM Total RT Inst (PTTRX)		None			Sold	10/02/24	J		
145. Account #4 (H)									
146. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	J	T	Sold (part)	02/21/24	J		
147.					Buy (add'l)	04/05/24	J		
148.					Sold (part)	05/08/24	J		
149.					Buy (add'l)	07/03/24	J		
150.					Sold (part)	07/24/24	J		
151. Fidelity SAI Inflation-Focused (FIFGX)		None			Buy (add'l)	02/20/24	J		
152.					Sold	07/02/24	J		
153. Strategic Advisers Fidelity Em Mkts (FGOMX)	C	Dividend	M	T	Buy (add'l)	02/20/24	J		

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 Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
154.					Sold (part)	05/07/24	J		
155.					Buy (add'l)	06/25/24	J		
156.					Buy (add'l)	07/02/24	K		
157.					Buy (add'l)	07/23/24	L		
158.					Buy (add'l)	09/12/24	J		
159.					Sold (part)	10/15/24	J		
160.					Buy (add'l)	11/15/24	J		
161.	Strategic Advisers Fidelity US TtlStk (FCTDX)	D	Dividend	N	T	Sold (part)	04/04/24	J		
162.					Buy (add'l)	05/07/24	J		
163.					Sold (part)	06/25/24	J		
164.					Buy (add'l)	07/02/24	K		
165.	Strategic Advisers Fidelity International Fund (FUSIX)	B	Dividend	L	T	Buy (add'l)	01/16/24	J		
166.					Buy (add'l)	02/20/24	J		
167.					Sold (part)	04/04/24	J		
168.					Buy (add'l)	05/07/24	J		
169.					Buy (add'l)	06/25/24	J		
170.					Sold (part)	07/23/24	J		

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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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
171.					Sold (part)	11/15/24	J		
172. Fidelity SAI Emerging Markets Index (FERGX)		None			Sold	07/02/24	J		
173. Strategic Advisers Fidelity Core Income Fund (FIWGX)	C	Dividend	K	T	Sold (part)	01/16/24	J		
174.					Sold (part)	04/04/24	J		
175.					Sold (part)	06/25/24	J		
176.					Sold (part)	07/02/24	K		
177.					Sold (part)	07/23/24	L		
178.					Sold (part)	09/12/24	J		
179.					Buy (add'l)	10/15/24	J		
180. Fidelity SAI Short-Term Bond Fund (FZOMX)	A	Dividend			Buy (add'l)	04/04/24	J		
181.					Sold	07/02/24	J		
182. Fidelity SAI Low Duration Income Fund (FZOLX)	A	Dividend			Buy (add'l)	04/04/24	J		
183.					Sold	07/02/24	J		
184. Fidelity SAI Long-Term Treasury Bond Index Fund (FBLTX)	A	Dividend			Sold	01/16/24	J		
185. Fidelity SAI High Income Fund (FSHGX)	A	Dividend			Sold	07/02/24	J		
186. Fidelity SAI US Treasury Bond Index (FUTBX)	A	Dividend			Buy	01/16/24	J		
187.					Buy (add'l)	02/20/24	J		

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 Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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188.					Buy (add'l)	06/25/24	J		
189.					Sold	07/02/24	J		
190. Account #5 (H)									
191. UBS Bank (cash) (Y)									
192. Fidelity Government Money Market (SPAXX) (cash eq.)	B	Dividend	L	T	Sold (part)	01/02/24	J		
193.					Buy (add'l)	01/11/24	J		
194.					Sold (part)	01/16/24	K		
195.					Sold (part)	01/17/24	J		
196.					Sold (part)	01/23/24	J		
197.					Sold (part)	01/25/24	J		
198.					Sold (part)	01/29/24	J		
199.					Buy (add'l)	01/30/24	J		
200.					Buy (add'l)	01/31/24	J		
201.					Sold (part)	02/01/24	J		
202.					Sold (part)	02/07/24	K		
203.					Buy (add'l)	02/08/24	J		
204.					Sold (part)	02/21/24	J		

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
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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 Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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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)	
205.					Buy (add'l)	02/22/24	J		
206.					Sold (part)	02/27/24	J		
207.					Buy (add'l)	02/28/24	J		
208.					Buy (add'l)	02/29/24	J		
209.					Sold (part)	03/01/24	J		
210.					Buy (add'l)	03/07/24	J		
211.					Sold (part)	03/08/24	J		
212.					Sold (part)	03/14/24	J		
213.					Sold (part)	03/21/24	J		
214.					Buy (add'l)	03/21/24	J		
215.					Buy (add'l)	03/28/24	J		
216.					Sold (part)	04/01/24	J		
217.					Buy (add'l)	04/01/24	J		
218.					Buy (add'l)	04/04/24	J		
219.					Sold (part)	04/12/24	J		
220.					Sold (part)	04/15/24	J		
221.					Sold (part)	04/16/24	J		

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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☐ 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)	
222.					Buy (add'l)	04/17/24	J		
223.					Buy (add'l)	04/18/24	J		
224.					Sold (part)	04/19/24	J		
225.					Sold (part)	04/23/24	J		
226.					Sold (part)	04/24/24	J		
227.					Buy (add'l)	04/29/24	J		
228.					Buy (add'l)	04/30/24	J		
229.					Sold (part)	05/01/24	J		
230.					Buy (add'l)	05/02/24	J		
231.					Sold (part)	05/13/24	J		
232.					Buy (add'l)	05/16/24	J		
233.					Sold (part)	05/21/24	J		
234.					Sold (part)	05/29/24	J		
235.					Buy (add'l)	05/30/24	K		
236.					Sold (part)	05/31/24	J		
237.					Sold (part)	06/03/24	K		
238.					Buy (add'l)	06/10/24	J		

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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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)	
239.					Sold (part)	06/12/24	J		
240.					Sold (part)	06/13/24	J		
241.					Buy (add'l)	06/13/24	J		
242.					Sold (part)	06/14/24	J		
243.					Buy (add'l)	06/21/24	J		
244.					Sold (part)	06/24/24	J		
245.					Buy (add'l)	06/25/24	J		
246.					Sold (part)	06/26/24	J		
247.					Buy (add'l)	06/27/24	J		
248.					Sold (part)	06/28/24	J		
249.					Buy (add'l)	07/11/24	J		
250.					Sold (part)	07/18/24	J		
251.					Buy (add'l)	07/30/24	J		
252.					Buy (add'l)	07/31/24	J		
253.					Sold (part)	08/01/24	J		
254.					Buy (add'l)	08/02/24	J		
255.					Buy (add'l)	08/08/24	J		

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
Donnelly, Ann M.	08/13/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
256.					Buy (add'l)	08/19/24	J		
257.					Buy (add'l)	08/22/24	J		
258.					Sold (part)	08/26/24	J		
259.					Sold (part)	08/27/24	J		
260.					Buy (add'l)	08/29/24	J		
261.					Buy (add'l)	08/30/24	J		
262.					Sold (part)	09/03/24	K		
263.					Buy (add'l)	09/05/24	J		
264.					Buy (add'l)	09/09/24	J		
265.					Sold (part)	09/11/24	J		
266.					Buy (add'l)	09/19/24	J		
267.					Sold (part)	09/26/24	J		
268.					Buy (add'l)	09/27/24	J		
269.					Buy (add'l)	09/30/24	J		
270.					Sold (part)	10/01/24	K		
271.					Buy (add'l)	10/03/24	J		
272.					Sold (part)	10/15/24	J		

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
Donnelly, Ann M.	08/13/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
273.					Buy (add'l)	10/17/24	J		
274.					Sold (part)	10/24/24	J		
275.					Buy (add'l)	10/30/24	J		
276.					Buy (add'l)	10/31/24	J		
277.					Sold (part)	11/01/24	J		
278.					Sold (part)	11/04/24	J		
279.					Buy (add'l)	11/04/24	J		
280.					Buy (add'l)	11/05/24	L		
281.					Sold (part)	11/06/24	J		
282.					Buy (add'l)	11/14/24	J		
283.					Buy (add'l)	11/27/24	J		
284.					Buy (add'l)	11/29/24	K		
285.					Sold (part)	12/02/24	K		
286.					Buy (add'l)	12/12/24	J		
287.					Sold (part)	12/23/24	J		
288.					Buy (add'l)	12/26/24	J		
289.					Buy (add'l)	12/30/24	J		

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
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
290.					Buy (add'l)	12/31/24	J		
291. American Funds American Mutual Fund (AMRFX)	D	Dividend	M	T					
292. Cisco Systems Inc (CSCO)	B	Dividend	L	T					
293. Fidelity Inv MM Fds Government Fund Class I (FRGXX) (cash eq.)	D	Dividend	L	T	Sold (part)	02/21/24	J		
294.					Sold (part)	02/27/24	J		
295.					Sold (part)	04/24/24	K		
296.					Sold (part)	04/26/24	J		
297.					Sold (part)	06/21/24	J		
298.					Sold (part)	07/01/24	J		
299.					Sold (part)	07/02/24	J		
300.					Sold (part)	07/03/24	J		
301.					Sold (part)	07/24/24	J		
302.					Sold (part)	09/11/24	J		
303.					Sold (part)	09/16/24	J		
304.					Sold (part)	09/17/24	J		
305.					Sold (part)	09/26/24	J		
306.					Sold (part)	10/01/24	J		

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 Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
307.					Sold (part)	10/02/24	J		
308.					Sold (part)	10/15/24	K		
309.					Sold (part)	10/24/24	K		
310.					Sold (part)	10/28/24	J		
311.					Buy (add'l)	10/31/24	K		
312. American Funds Growth Fund of America (GFFFX)	D	Dividend	L	T					
313. Lord Abbett Bond Debenture (LBNYX)	B	Dividend	K	T					
314. Nicholas Funds Nicholas Fund Inc (NICSX)	C	Dividend	K	T					
315. JP Morgan Large Cap Growth Fund Class I (SEEGX)	C	Dividend	N	T					
316. Schwab 1000 Index Fund (SNXFX)	B	Dividend	M	T					
317. Travelers Cos Inc (TRV)	A	Dividend	K	T					
318. American Century Ultra Fund (TWUIX)	C	Dividend	L	T					
319. Account #6 (H)									
320. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	K	T	Sold (part)	07/03/24	J		
321.					Sold (part)	07/03/24	J		
322.					Buy (add'l)	07/05/24	J		
323.					Sold (part)	07/24/24	J		

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
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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 Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
324.					Sold (part)	08/09/24	J		
325.					Buy (add'l)	09/13/24	J		
326.					Sold (part)	09/13/24	J		
327.					Buy (add'l)	10/04/24	J		
328.					Sold (part)	10/16/24	J		
329.					Sold (part)	11/15/24	J		
330.					Buy (add'l)	12/06/24	J		
331.					Buy (add'l)	12/13/24	J		
332.					Buy (add'l)	12/20/24	J		
333.					Buy (add'l)	12/26/24	J		
334. Fidelity Blue Chip Value (FBCVX)	C	Dividend	K	T					
335. Fidelity Growth Company Fund (FDGRX)	C	Dividend	K	T					
336. Fidelity Emerging Markets Discovery (FEDDX)	A	Dividend	J	T					
337. Fidelity Emerging Markets Fund (FEMKX)	A	Dividend	J	T					
338. Fidelity International Small Cap (FISMX)	A	Dividend	J	T					
339. Fidelity International Value Factor ETF (FIVA)	A	Dividend	J	T					
340. Fidelity International Capital Apprec (FIVFX)	B	Dividend	K	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

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 Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
341. Fidelity International Value (FIVLX)	A	Dividend	K	T	Buy (add'l)	01/10/24	J		
342.					Buy (add'l)	02/21/24	J		
343. Fidelity Large Cap Stock Fund (FLCSX)	B	Dividend	K	T	Buy (add'l)	02/21/24	J		
344. Fidelity Magellan Fund (FMAGX)	C	Dividend	L	T					
345. Fidelity Advisor Conservative Income Municipal Bond Fund (FMNDX)	A	Dividend	J	T	Buy (add'l)	01/10/24	J		
346.					Sold (part)	01/19/24	K		
347.					Sold (part)	07/02/24	J		
348. Fidelity Emerging Markets Index Fund (FPADX)	A	Dividend	K	T	Sold (part)	01/10/24	J		
349.					Buy (add'l)	04/05/24	J		
350.					Buy (add'l)	06/10/24	J		
351. Fidelity SAI Tax-Free Bond (FSAJX)	C	Dividend	M	T					
352. Fidelity Mid Cap Index (FSMDX)	B	Dividend	L	T	Buy (add'l)	07/02/24	J		
353. Fidelity SAI Conserv Income Muni Bond Fd (FSMJX)	B	Dividend	K	T	Buy	01/19/24	K		
354.					Buy (add'l)	02/21/24	J		
355.					Buy (add'l)	07/23/24	J		
356.					Buy (add'l)	10/15/24	J		
357.					Buy (add'l)	11/15/24	J		

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	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
358. Fidelity International Index (FSPSX)	C	Dividend	M	T	Buy (add'l)	07/23/24	J		
359.					Buy (add'l)	09/12/24	J		
360.					Sold (part)	11/15/24	J		
361. Fidelity Small Cap Index (FSSNX)	A	Dividend	K	T	Buy (add'l)	01/10/24	J		
362. Fidelity New York Municipal Income (FTFMX)	B	Dividend	L	T	Buy (add'l)	01/10/24	J		
363.					Buy (add'l)	02/21/24	J		
364.					Buy (add'l)	04/05/24	J		
365.					Sold (part)	06/10/24	J		
366.					Sold (part)	07/02/24	J		
367.					Sold (part)	07/23/24	J		
368. Fidelity Interm Trs Bd Index (FUAMX)	A	Dividend	K	T					
369. Fidelity Value Factor ETF (FVAL)	A	Dividend	J	T					
370. Fidelity Value Discovery Fund (FVDFX)	A	Dividend	J	T					
371. Fidelity 500 Index Fund (FXAIX)	C	Dividend	N	T					
372. Fidelity Advisor Focused Emerging Markets Fund (FZAEX)	A	Dividend	K	T					
373. JP Morgan Large Cap Growth Fund (SEEGX) (Y)									

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

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

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value.

Account #3 is controlled and managed by the employer of an individual with assets subject to this report. The account holder is permitted to adjust percentages of investment for each position, but the timing of any transactions is within the exclusive purview of the manager. Despite request, specific transaction dates are not available to the filer. In the absence of more precise information, transactions are reported as of the second business day of the quarter in which they occurred.

Name of Person Reporting	Date of Report
Donnelly, Ann M.	08/13/2025

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. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Ann M. Donnelly

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. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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