Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Donnelly, Ann
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/ Donnelly, Ann [electronically signed on Aug 7, 2026 8:00am by Donnelly, Ann in JEFS]

I. Positions

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

II. Agreements

	EMPLOYER OR PARTY NAME	TERMS	AGREEMENT START MONTH	AGREEMENT START YEAR
1.	NY State Pension Plan	Defined Benefit Pension Plan		2015

III A. Filer Non-Investment Income

	SOURCE	INCOME TYPE	INCOME AMOUNT	HONORARIUM DATE
1.	New York State Retirement System	Fixed Retirement / Pension Benefits	$95,501.52	

III B. Spouse Non-Investment Income

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	Ernst & Young (salary)		No	$0.00	
2.	Citigroup (pension)		No	$0.00	

IV. Reimbursements

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

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.	Rental Property, Brooklyn, NY	$15,001 - $50,000	Rent	$500,001 - $1,000,000	Estimated
2.	**(H) Account #1**				
2-A.	Fidelity Government Cash Reserves (FDRXX) (cash eq.)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-B.	Fidelity SAI Long Term Treasury Bond Index (FBLTX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 28, 2025	$15,000 or less
(2).	Buy (add'l)	May 13, 2025	$15,000 or less
(3).	Buy (add'l)	Jul 15, 2025	$15,000 or less
(4).	Buy (add'l)	Aug 18, 2025	$15,000 or less

2-C.	Strategic Advisers Fidelity US TtlStk (FCTDX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 25, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 28, 2025	$15,000 or less
(4).	Sold (part)	Apr 23, 2025	$15,000 or less
(5).	Sold (part)	May 2, 2025	$15,000 or less
(6).	Sold (part)	May 13, 2025	$15,000 or less
(7).	Sold (part)	Jul 15, 2025	$15,000 or less
(8).	Sold (part)	Oct 29, 2025	$15,000 or less

2-D.	Strategic Advisers Fidelity Em Mkts (FGOMX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 28, 2025	$15,000 or less

2-E.	Fidelity SAI Inflation-Focused (FIFGX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-F.	Strategic Advisers Fidelity Core Inc (FIWGX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$15,000 or less
(2).	Sold (part)	Mar 28, 2025	$15,000 or less
(3).	Buy (add'l)	Apr 23, 2025	$15,000 or less
(4).	Buy (add'l)	May 2, 2025	$15,000 or less
(5).	Buy (add'l)	May 13, 2025	$15,000 or less
(6).	Buy (add'l)	Jul 15, 2025	$15,000 or less
(7).	Buy (add'l)	Oct 29, 2025	$15,000 or less
(8).	Buy (add'l)	Dec 16, 2025	$15,000 or less

2-G.	Strategic Advisers Fid Aternatives Fd (FSAOX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-H.	Fidelity SAI High Income Fund (FSHGX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

2-I.	Fidelity SAI Canada Equity Index Fund (FSCJX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-J.	Fidelity SAI Inflation Protected Bond (FSPWX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 25, 2025	$15,000 or less
(2).	Sold (part)	Mar 28, 2025	$15,000 or less

2-K.	Fidelity SAI Real Estate Fund (FSRJX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Sep 26, 2025	$15,000 or less

2-L.	Strategic Advisers Fidelity International Fund (FUSIX)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,000 or less
(2).	Sold (part)	Feb 25, 2025	$15,000 or less
(3).	Sold (part)	Mar 28, 2025	$15,000 or less
(4).	Sold (part)	Apr 23, 2025	$15,000 or less
(5).	Sold (part)	Aug 18, 2025	$15,000 or less

2-M.	Fid Salem St Trust - Fidelity SAI Short-Term Bond Fund (FZOMX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$15,000 or less
(2).	Sold (part)	Mar 28, 2025	$15,000 or less
(3).	Sold (part)	May 13, 2025	$15,000 or less

3.	**(H) Account #2**				
3-A.	Fidelity Government Cash Reserves (FDRXX) (cash eq.)	$1,001 - $2,500	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)	Jan 3, 2025	$15,000 or less
(2).	Sold (part)	Feb 21, 2025	$15,000 or less
(3).	Buy (add'l)	Feb 26, 2025	$15,000 or less
(4).	Sold (part)	Mar 31, 2025	$15,000 or less
(5).	Buy (add'l)	Apr 24, 2025	$15,000 or less
(6).	Buy (add'l)	May 14, 2025	$15,000 or less
(7).	Sold (part)	May 16, 2025	$15,000 or less
(8).	Sold (part)	Jun 18, 2025	$15,000 or less
(9).	Buy (add'l)	Jul 16, 2025	$15,000 or less
(10).	Sold (part)	Aug 22, 2025	$15,000 or less
(11).	Buy (add'l)	Sep 12, 2025	$15,000 or less
(12).	Sold (part)	Sep 29, 2025	$15,000 or less
(13).	Buy (add'l)	Oct 30, 2025	$15,000 or less
(14).	Sold (part)	Nov 14, 2025	$15,000 or less
(15).	Buy (add'l)	Dec 12, 2025	$15,000 or less
(16).	Buy (add'l)	Dec 17, 2025	$15,000 or less
(17).	Sold (part)	Dec 17, 2025	$15,000 or less
(18).	Sold (part)	Dec 30, 2025	$15,000 or less

3-B. Fidelity SAI Long Term Treasury Bond Index (FBLTX) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 28, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 15, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 26, 2025	$15,000 or less
(4).	Buy (add'l)	Dec 16, 2025	$15,000 or less
(5).	Buy (add'l)	Dec 29, 2025	$15,000 or less

3-C. Strategic Advisers Fid Aternatives Fd (FSAOX) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 15, 2025	$15,000 or less
(2).	Buy (add'l)	Aug 18, 2025	$15,000 or less
(3).	Buy (add'l)	Oct 29, 2025	$15,000 or less
(4).	Buy (add'l)	Dec 29, 2025	$15,000 or less

3-D. Fidelity SAI Canada Equity Index Fund (FSCJX) — $1,000 or less — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 23, 2025	$15,000 or less
(3).	Buy (add'l)	May 2, 2025	$15,000 or less
(4).	Buy (add'l)	May 13, 2025	$15,000 or less
(5).	Buy (add'l)	May 20, 2025	$15,000 or less
(6).	Buy (add'l)	Sep 26, 2025	$15,000 or less
(7).	Buy (add'l)	Dec 16, 2025	$15,000 or less

3-E. Fidelity SAI High Income Fund (FSHGX) — $1,001 - $2,500 — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,001 - $50,000
(2).	Sold (part)	Apr 23, 2025	$15,000 or less
(3).	Sold (part)	May 20, 2025	$15,000 or less

3-F. Strategic Advisers Fidelity Em Mkts (FGOMX) — $2,501 - $5,000 — Dividend — $100,001 - $250,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 25, 2025	$15,000 or less
(3).	Sold (part)	Mar 28, 2025	$15,000 or less
(4).	Sold (part)	Apr 23, 2025	$15,000 or less
(5).	Sold (part)	Jun 17, 2025	$15,000 or less
(6).	Sold (part)	Aug 18, 2025	$15,000 or less
(7).	Sold (part)	Oct 29, 2025	$15,000 or less

3-G. Strategic Advisers Fidelity International Fund (FUSIX) — $15,001 - $50,000 — Dividend — $500,001 - $1,000,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,000 or less
(2).	Sold (part)	Feb 25, 2025	$15,001 - $50,000
(3).	Sold (part)	Mar 28, 2025	$15,001 - $50,000
(4).	Sold (part)	Apr 23, 2025	$15,000 or less
(5).	Buy (add'l)	May 13, 2025	$15,000 or less
(6).	Buy (add'l)	May 20, 2025	$15,000 or less
(7).	Sold (part)	Aug 18, 2025	$15,000 or less

3-H. Strategic Advisers Fidelity US TtlStk (FCTDX) — $15,001 - $50,000 — Dividend — $1,000,001 - $5,000,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 25, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 28, 2025	$50,001 - $100,000
(4).	Sold (part)	Apr 23, 2025	$15,001 - $50,000
(5).	Sold (part)	May 2, 2025	$15,001 - $50,000
(6).	Sold (part)	May 13, 2025	$15,001 - $50,000
(7).	Buy (add'l)	May 20, 2025	$15,000 or less
(8).	Sold (part)	Jul 15, 2025	$15,001 - $50,000
(9).	Sold (part)	Oct 29, 2025	$15,001 - $50,000
(10).	Sold (part)	Dec 29, 2025	$15,000 or less

3-I. Fidelity Advisor Strategic Income Fund (FSRIX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

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

3-J. Fidelity SAI Inflation Protected Bond (FSPWX) — $2,501 - $5,000 — Dividend — $50,001 - $100,000 — Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 25, 2025	$15,000 or less
(3).	Sold (part)	Mar 28, 2025	$15,000 or less
(4).	Sold (part)	Apr 23, 2025	$15,000 or less
(5).	Buy (add'l)	May 2, 2025	$15,000 or less
(6).	Buy (add'l)	May 13, 2025	$15,000 or less
(7).	Sold (part)	May 20, 2025	$15,000 or less
(8).	Buy (add'l)	Jun 17, 2025	$15,000 or less
(9).	Buy (add'l)	Jul 15, 2025	$15,000 or less
(10).	Buy (add'l)	Aug 18, 2025	$15,000 or less
(11).	Buy (add'l)	Oct 29, 2025	$15,000 or less
(12).	Buy (add'l)	Dec 29, 2025	$15,000 or less

3-K. Fidelity SAI Inflation-Focused (FIFGX) — $2,501 - $5,000 — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 25, 2025	$15,000 or less
(3).	Sold (part)	Mar 28, 2025	$15,000 or less
(4).	Buy (add'l)	May 2, 2025	$15,000 or less
(5).	Sold (part)	Jun 17, 2025	$15,000 or less
(6).	Sold (part)	Aug 18, 2025	$15,000 or less
(7).	Sold (part)	Dec 16, 2025	$15,000 or less
(8).	Sold (part)	Dec 29, 2025	$15,000 or less

3-L. Fidelity SAI Short-Term Bond Fund (FZOMX) — $1,001 - $2,500 — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	May 2, 2025	$15,000 or less
(2).	Sold (part)	May 13, 2025	$15,000 or less
(3).	Buy (add'l)	May 20, 2025	$15,000 or less

3-M. Fidelity SAI Real Estate Fund (FSRJX) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 28, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$15,000 or less
(3).	Sold (part)	Sep 26, 2025	$15,000 or less

3-N. Strategic Advisers Fidelity Core Income Fund (FIWGX) — $15,001 - $50,000 — Dividend — $500,001 - $1,000,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$50,001 - $100,000
(2).	Sold (part)	Feb 25, 2025	$15,000 or less
(3).	Buy (add'l)	Apr 23, 2025	$15,001 - $50,000
(4).	Buy (add'l)	May 2, 2025	$15,001 - $50,000
(5).	Buy (add'l)	May 13, 2025	$15,001 - $50,000
(6).	Buy (add'l)	Jul 15, 2025	$15,001 - $50,000
(7).	Buy (add'l)	Aug 18, 2025	$15,001 - $50,000
(8).	Buy (add'l)	Oct 29, 2025	$15,001 - $50,000

3-O. Fidelity SAI Low Duration Income Fund (FZOLX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$15,000 or less
(2).	Sold (part)	Mar 28, 2025	$15,001 - $50,000
(3).	Sold (part)	May 13, 2025	$15,001 - $50,000
(4).	Buy (add'l)	Jun 17, 2025	$15,000 or less

4. **(H) Account #3**

4-A. Dodge & Cox Stock X — $1,001 - $2,500 — Dividend — $15,001 - $50,000 — Cash/Market

4-B. TRP New Horizons I — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jun 11, 2025	$15,000 or less

4-C. Vanguard Target Ret 2020 — None — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 11, 2025	$15,000 or less

4-D. American Funds New Perspective R6 World — $1,001 - $2,500 — Dividend — $15,000 or less — Cash/Market

4-E. FID GR Co K6 — $1,001 - $2,500 — Dividend — $15,001 - $50,000 — Cash/Market

4-F. Pimco Total Return A — None — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 25, 2025	$15,000 or less

4-G. Pimco Total Return Inst — $1,000 or less — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 25, 2025	$15,000 or less

4-H. Capital Group Europacific Growth U2 — None — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 25, 2025	$15,000 or less

4-I. American Funds Europacific Fund R6 — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 25, 2025	$15,000 or less

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

5-A. Fidelity Government Cash Reserves (FDRXX) (cash eq.) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

5-B. Fidelity SAI Canada Equity Index Fund (FSCJX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 26, 2025	$15,000 or less

5-C. Strategic Advisers Fidelity Em Mkts (FGOMX) — $2,501 - $5,000 — Dividend — $100,001 - $250,000 — Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 25, 2025	$15,000 or less
(2).	Sold (part)	Mar 28, 2025	$15,000 or less
(3).	Buy (add'l)	May 2, 2025	$15,000 or less
(4).	Sold (part)	Jun 17, 2025	$15,000 or less
(5).	Sold (part)	Aug 18, 2025	$15,000 or less
(6).	Sold (part)	Sep 26, 2025	$15,000 or less
(7).	Sold (part)	Oct 29, 2025	$15,000 or less

5-D.	Strategic Advisers Fidelity US TtlStk (FCTDX)	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 25, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 28, 2025	$15,000 or less
(3).	Sold (part)	May 13, 2025	$15,000 or less
(4).	Sold (part)	May 20, 2025	$15,000 or less
(5).	Sold (part)	Dec 29, 2025	$15,000 or less

5-E.	Strategic Advisers Fidelity International Fund (FUSIX)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 23, 2025	$15,000 or less
(2).	Sold (part)	May 2, 2025	$15,000 or less

5-F.	Strategic Advisers Fidelity Core Income Fund (FIWGX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 25, 2025	$15,000 or less

5-G.	Fid Salem Street Trust - Fidelity SAI Short-Term Bond Fund (FZOM	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 13, 2025	$15,000 or less

5-H.	Fidelity SAI Inflation Protected Bond (FSPWX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 17, 2025	$15,000 or less

5-I.	Fidelity SAI Long Term Treasury Bond Index (FBLTX)	$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)	Oct 29, 2025	$15,000 or less
(3).	Buy (add'l)	Dec 16, 2025	$15,000 or less
(4).	Buy (add'l)	Dec 29, 2025	$15,000 or less

5-J.	Strategic Advisers Fid Aternatives Fd (FSAOX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 18, 2025	$15,000 or less
(2).	Buy (add'l)	Oct 29, 2025	$15,000 or less

5-K.	Fidelity SAI High Income Fund (FSHGX)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 23, 2025	$15,000 or less
(2).	Buy (add'l)	May 2, 2025	$15,000 or less
(3).	Sold	Dec 16, 2025	$15,000 or less

5-L.	Fidelity Advisor Strategic Income Fund (FSRIX)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 23, 2025	$15,000 or less
(2).	Sold	Dec 16, 2025	$15,000 or less

6.	**(H) Account #5**				
6-A.	Fidelity Government Money Market (SPAXX) (cash eq.)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

DESCRIPTION				INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**				
(1).	Sold (part)	Jan 2, 2025	$15,000 or less				
(2).	Buy (add'l)	Jan 3, 2025	$15,000 or less				
(3).	Sold (part)	Jan 8, 2025	$15,000 or less				
(4).	Buy (add'l)	Jan 9, 2025	$15,000 or less				
(5).	Sold (part)	Jan 15, 2025	$15,001 - $50,000				
(6).	Sold (part)	Jan 17, 2025	$15,000 or less				
(7).	Sold (part)	Jan 22, 2025	$15,000 or less				
(8).	Buy (add'l)	Jan 23, 2025	$15,000 or less				
(9).	Buy (add'l)	Jan 30, 2025	$15,001 - $50,000				
(10).	Sold (part)	Feb 3, 2025	$15,001 - $50,000				
(11).	Sold (part)	Feb 4, 2025	$15,000 or less				
(12).	Buy (add'l)	Feb 6, 2025	$15,000 or less				
(13).	Buy (add'l)	Feb 20, 2025	$15,000 or less				
(14).	Buy (add'l)	Feb 27, 2025	$15,001 - $50,000				
(15).	Sold (part)	Mar 3, 2025	$15,000 or less				
(16).	Buy (add'l)	Mar 6, 2025	$15,000 or less				
(17).	Sold (part)	Mar 11, 2025	$15,000 or less				
(18).	Sold (part)	Mar 19, 2025	$15,000 or less				
(19).	Buy (add'l)	Mar 20, 2025	$15,000 or less				
(20).	Buy (add'l)	Mar 24, 2025	$15,001 - $50,000				
(21).	Sold (part)	Mar 25, 2025	$15,000 or less				
(22).	Buy (add'l)	Mar 28, 2025	$15,000 or less				
(23).	Buy (add'l)	Mar 31, 2025	$15,000 or less				
(24).	Sold (part)	Apr 1, 2025	$15,000 or less				
(25).	Buy (add'l)	Apr 2, 2025	$15,000 or less				
(26).	Buy (add'l)	Apr 3, 2025	$15,000 or less				
(27).	Sold (part)	Apr 15, 2025	$15,000 or less				
(28).	Buy (add'l)	Apr 17, 2025	$15,000 or less				
(29).	Buy (add'l)	Apr 22, 2025	$15,001 - $50,000				
(30).	Buy (add'l)	Apr 23, 2025	$15,001 - $50,000				
(31).	Sold (part)	Apr 24, 2025	$15,000 or less				
(32).	Sold (part)	Apr 28, 2025	$15,000 or less				
(33).	Buy (add'l)	Apr 29, 2025	$15,000 or less				
(34).	Buy (add'l)	Apr 30, 2025	$15,000 or less				
(35).	Sold (part)	May 1, 2025	$15,000 or less				
(36).	Buy (add'l)	May 1, 2025	$15,000 or less				
(37).	Buy (add'l)	May 2, 2025	$15,000 or less				
(38).	Buy (add'l)	May 13, 2025	$15,000 or less				
(39).	Buy (add'l)	May 15, 2025	$15,000 or less				
(40).	Buy (add'l)	May 29, 2025	$15,000 or less				
(41).	Buy (add'l)	May 30, 2025	$15,000 or less				
(42).	Sold (part)	Jun 2, 2025	$15,001 - $50,000				
(43).	Buy (add'l)	Jun 3, 2025	$15,000 or less				
(44).	Sold (part)	Jun 4, 2025	$15,000 or less				
(45).	Buy (add'l)	Jun 12, 2025	$15,000 or less				
(46).	Sold (part)	Jun 13, 2025	$15,001 - $50,000				
(47).	Sold (part)	Jun 16, 2025	$15,000 or less				
(48).	Sold (part)	Jun 24, 2025	$15,000 or less				
(49).	Buy (add'l)	Jun 26, 2025	$15,000 or less				
(50).	Buy (add'l)	Jun 27, 2025	$15,001 - $50,000				
(51).	Buy (add'l)	Jun 30, 2025	$15,000 or less				
(52).	Buy (add'l)	Jul 2, 2025	$15,000 or less				
(53).	Sold (part)	Jul 3, 2025	$15,000 or less				
(54).	Buy (add'l)	Jul 10, 2025	$15,000 or less				
(55).	Buy (add'l)	Jul 24, 2025	$15,000 or less				
(56).	Buy (add'l)	Jul 30, 2025	$15,000 or less				
(57).	Buy (add'l)	Jul 31, 2025	$15,000 or less				
(58).	Sold (part)	Aug 1, 2025	$15,000 or less				
(59).	Sold (part)	Aug 4, 2025	$15,000 or less				
(60).	Buy (add'l)	Aug 7, 2025	$15,000 or less				
(61).	Buy (add'l)	Aug 21, 2025	$15,000 or less				
(62).	Buy (add'l)	Aug 29, 2025	$15,000 or less				
(63).	Sold (part)	Sep 2, 2025	$15,000 or less				
(64).	Buy (add'l)	Sep 3, 2025	$15,000 or less				
(65).	Buy (add'l)	Sep 4, 2025	$15,000 or less				
(66).	Sold (part)	Sep 15, 2025	$15,000 or less				
(67).	Sold (part)	Sep 16, 2025	$15,000 or less				
(68).	Sold (part)	Sep 17, 2025	$15,001 - $50,000				
(69).	Buy (add'l)	Sep 18, 2025	$15,000 or less				
(70).	Sold (part)	Sep 19, 2025	$15,000 or less				
(71).	Sold (part)	Sep 22, 2025	$15,000 or less				
(72).	Sold (part)	Sep 30, 2025	$15,000 or less				
(73).	Buy (add'l)	Sep 30, 2025	$15,000 or less				
(74).	Sold (part)	Oct 1, 2025	$15,000 or less				
(75).	Buy (add'l)	Oct 2, 2025	$15,000 or less				
(76).	Sold (part)	Oct 6, 2025	$15,000 or less				
(77).	Sold (part)	Oct 14, 2025	$15,000 or less				
(78).	Buy (add'l)	Oct 16, 2025	$15,000 or less				
(79).	Sold (part)	Oct 17, 2025	$15,000 or less				
(80).	Sold (part)	Oct 22, 2025	$15,001 - $50,000				
(81).	Buy (add'l)	Oct 30, 2025	$15,001 - $50,000				
(82).	Sold (part)	Oct 31, 2025	$15,001 - $50,000				
(83).	Sold (part)	Nov 3, 2025	$15,001 - $50,000				
(84).	Buy (add'l)	Nov 4, 2025	$15,000 or less				
(85).	Buy (add'l)	Nov 13, 2025	$15,000 or less				
(86).	Buy (add'l)	Nov 20, 2025	$15,001 - $50,000				
(87).	Sold (part)	Nov 24, 2025	$15,000 or less				
(88).	Sold (part)	Nov 25, 2025	$15,000 or less				
(89).	Buy (add'l)	Nov 26, 2025	$15,000 or less				
(90).	Buy (add'l)	Nov 28, 2025	$15,001 - $50,000				
(91).	Sold (part)	Dec 1, 2025	$15,000 or less				
(92).	Buy (add'l)	Dec 2, 2025	$15,000 or less				
(93).	Sold (part)	Dec 8, 2025	$15,000 or less				
(94).	Buy (add'l)	Dec 11, 2025	$15,000 or less				
(95).	Sold (part)	Dec 12, 2025	$15,000 or less				
(96).	Sold (part)	Dec 17, 2025	$15,000 or less				
(97).	Sold (part)	Dec 24, 2025	$15,000 or less				
(98).	Buy (add'l)	Dec 26, 2025	$15,000 or less				
(99).	Buy (add'l)	Dec 30, 2025	$15,000 or less				

(100).	Buy (add'l)	Dec 31, 2025	$15,000 or less

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
6-B.	American Funds American Mutual Fund (AMRFX)	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market
6-C.	Cisco Systems Inc (CSCO)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
6-D.	Fidelity Inv MM Fds Government Fund Class I (FRGXX) (cash eq.)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
6-E.	American Funds Growth Fund of America (GFFFX)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
6-F.	Lord Abbett Bond Debenture (LBNYX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
6-G.	Nicholas Funds Nicholas Fund Inc (NICSX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
6-H.	JP Morgan Large Cap Growth Fund Class I (SEEGX)	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market
6-I.	Schwab 1000 Index Fund (SNXFX)	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Aug 18, 2025	$100,001 - $250,000

6-J.	Travelers Cos Inc (TRV)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
6-K.	American Century Ultra Fund (TWUIX)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market

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

7-A.	Fidelity Government Cash Reserves (FDRXX) (cash eq.)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 6, 2025	$15,001 - $50,000
(2).	Sold (part)	Feb 21, 2025	$15,000 or less
(3).	Sold (part)	Mar 31, 2025	$15,000 or less
(4).	Buy (add'l)	May 9, 2025	$15,000 or less
(5).	Sold (part)	May 14, 2025	$15,000 or less
(6).	Sold (part)	May 16, 2025	$15,000 or less
(7).	Buy (add'l)	Jun 13, 2025	$15,000 or less
(8).	Buy (add'l)	Jun 16, 2025	$15,000 or less
(9).	Sold (part)	Jun 18, 2025	$15,000 or less
(10).	Sold (part)	Jun 27, 2025	$15,000 or less
(11).	Buy (add'l)	Jul 11, 2025	$15,000 or less
(12).	Buy (add'l)	Jul 16, 2025	$15,000 or less
(13).	Buy (add'l)	Jul 22, 2025	$15,000 or less
(14).	Sold (part)	Aug 19, 2025	$15,000 or less
(15).	Sold (part)	Aug 22, 2025	$15,000 or less
(16).	Buy (add'l)	Sep 12, 2025	$15,000 or less
(17).	Sold (part)	Sep 29, 2025	$15,000 or less
(18).	Buy (add'l)	Oct 3, 2025	$15,000 or less
(19).	Sold (part)	Nov 14, 2025	$15,000 or less
(20).	Buy (add'l)	Nov 18, 2025	$15,000 or less
(21).	Buy (add'l)	Dec 5, 2025	$15,000 or less
(22).	Buy (add'l)	Dec 12, 2025	$15,000 or less
(23).	Sold (part)	Dec 17, 2025	$15,000 or less
(24).	Buy (add'l)	Dec 19, 2025	$15,000 or less
(25).	Buy (add'l)	Dec 26, 2025	$15,000 or less
(26).	Sold (part)	Dec 30, 2025	$15,000 or less

7-B.	Fidelity Blue Chip Value (FBCVX)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 25, 2025	$15,000 or less
(2).	Sold	Apr 23, 2025	$15,001 - $50,000

7-C.	Fidelity Stock Selector Fund (FDSSX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 18, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 26, 2025	$15,000 or less

7-D.	Fidelity Growth Company Fund (FDGRX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 28, 2025	$15,000 or less

7-E.	Fidelity Emerging Markets Discovery (FEDDX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-F.	Fidelity Enhanced Large Cap Core ETF (FELC)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 26, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Dec 16, 2025	$15,000 or less

7-G.	Fidelity Emerging Markets Fund (FEMKX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-H.	Fidelity Fundamental Small-Mid Cap ETF (FFSM)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 18, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 26, 2025	$15,000 or less
(3).	Buy (add'l)	Dec 16, 2025	$15,000 or less

7-I.	Fidelity International Capital Apprec (FICQX) was (FIVFX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
7-J.	Fidelity International Small Cap (FISMX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-K.	Fidelity International Value Factor ETF (FIVA)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-L.	Fidelity International Value (FIVLX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jul 15, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 26, 2025	$15,000 or less
(3).	Buy (add'l)	Dec 29, 2025	$15,000 or less

7-M.	Fidelity Large Cap Stock Fund (FLCSX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 28, 2025	$15,001 - $50,000

7-N.	Fidelity Magellan Fund (FMAGX)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,000 or less
(2).	Sold (part)	Mar 28, 2025	$15,000 or less
(3).	Buy (add'l)	Dec 16, 2025	$15,000 or less

7-O.	Fidelity Advisor Conservative Income Municipal Bond Fund (FMNDX)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 25, 2025	$15,000 or less

7-P.	Fidelity Emerging Markets Index Fund (FPADX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-Q.	Fidelity SAI Tax-Free Bond (FSAJX)	$2,501 - $5,000	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).	Sold (part)	Jul 15, 2025	$15,001 - $50,000
(2).	Sold (part)	Aug 18, 2025	$15,000 or less
(3).	Sold (part)	Sep 26, 2025	$15,001 - $50,000
(4).	Sold (part)	Dec 16, 2025	$15,000 or less

7-R.	Fidelity Sml Mid Multfct (FSMD)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 3, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 25, 2025	$15,001 - $50,000
(3).	Sold	Mar 28, 2025	$15,001 - $50,000

7-S.	Fidelity Mid Cap Index (FSMDX)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
7-T.	Fidelity SAI Conserv Income Muni Bond Fd (FSMJX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 23, 2025	$15,001 - $50,000
(3).	Buy (add'l)	May 13, 2025	$15,000 or less
(4).	Sold (part)	Sep 26, 2025	$15,000 or less
(5).	Sold (part)	Dec 16, 2025	$15,001 - $50,000
(6).	Buy (add'l)	Dec 29, 2025	$15,000 or less

7-U.	Fidelity International Index (FSPSX)	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

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

7-V.	Fidelity Small Cap Index (FSSNX)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 28, 2025	$15,000 or less
(2).	Buy (add'l)	Jun 17, 2025	$15,000 or less
(3).	Buy (add'l)	Aug 18, 2025	$15,000 or less

7-W.	Fidelity New York Municipal Income (FTFMX)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
7-X.	Fidelity Interm Trs Bd Index (FUAMX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-Y.	Fidelity Value Factor ETF (FVAL)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-Z.	Fidelity Value Discovery Fund (FVDFX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 23, 2025	$15,000 or less
(3).	Buy (add'l)	Jun 17, 2025	$15,000 or less
(4).	Buy (add'l)	Jul 15, 2025	$15,000 or less
(5).	Buy (add'l)	Aug 18, 2025	$15,000 or less
(6).	Sold (part)	Sep 26, 2025	$15,000 or less
(7).	Buy (add'l)	Dec 16, 2025	$15,000 or less
(8).	Buy (add'l)	Dec 29, 2025	$15,000 or less

7-AA.	Fidelity 500 Index Fund (FXAIX)	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market
7-AB.	Fidelity Advisor Focused Emerging Markets Fund (FZAEX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

VIII. Additional Information or Explanations

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