**Annual, 2025**

## Financial Disclosure Report (AO Form 10)

**Filer's Information**
**Duncan, Stuart Kyle**
U.S. Court of Appeals - Fifth Circuit
Circuit 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/ Duncan, Stuart Kyle [electronically signed on Jul 13, 2026 2:17pm by Duncan, Stuart Kyle in JEFS]**

### I. Positions

| | ORGANIZATION/ENTITY NAME | ORGANIZATION/ENTITY TYPE | POSITION HELD |
|---|---|---|---|
| 1. | Regent University School of Law | University/College | Adjunct Faculty |
| 2. | Catholic University Columbus School of Law | University/College | Jurist in Residence |

### II. Agreements

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

### III A. Filer Non-Investment Income

| | SOURCE | INCOME TYPE | INCOME AMOUNT | HONORARIUM DATE |
|---|---|---|---|---|
| 1. | Regent University School of Law | Teaching Income | $1,000.00 | |
| 2. | Catholic University Law School | Other: Jurist in Residence/teaching inc | $3,000.00 | |

### III B. Spouse Non-Investment Income

I do not have any Spouse Non-Investment Income to report
No entries in this section

### IV. Reimbursements

| | SOURCE OF REIMBURSEMENT | FROM DATE | TO DATE | LOCATION | PURPOSE | ITEMS PAID OR PROVIDED |
|---|---|---|---|---|---|---|
| 1. | Catholic University Law School | Jun 7, 2025 | Jun 22, 2025 | Krakow, Poland | Teaching | Transportation, food, lodging |
| 2. | Notre Dame Law School | Jun 22, 2025 | Jun 24, 2025 | Dublin, Ireland | Judicial Conference | Transportation, food, lodging |
| 3. | Notre Dame Law School | Feb 12, 2025 | Feb 13, 2025 | South Bend, IN | Speaker | Transportation, food, lodging |

## 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. | Campus Federal Credit Union (cash) | $1,000 or less | Interest | $15,000 or less | Cash/Market |
| 2. | **(H) Account #1** | | | | |
| 2-A. | T. Rowe Price US Equity Research<br>**Additional Explanation**: The ticker symbol for this asset is (TSPA) | $5,001 - $15,000 | Dividend | $50,001 - $100,000 | Cash/Market |
| 2-B. | AB Small Cap Growth Portfolio Advisor Class (QUAYX) | | None | $15,000 or less | Cash/Market |
| 2-C. | Allspring Core Plus Bond Fund Class Institutional (WIPIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-D. | American Funds Strategic Bond Fund Class F-2 (ANBFX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-E. | AQR Long-Short Equity Fund Class I (QLEIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-F. | Brown Advisory Sustainable Growth Fund Inv (BIAWX) | $15,001 - $50,000 | Gain | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jan 3, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 2-G. | Cohen & Steers Real Estate Securities Fund (CSDIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-H. | Cohen & Steers Realty Shares Fund Class L (CSRSX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-I. | Fidelity Adv Equity Grw I (EQPGX) | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Jan 3, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 2-J. | FullerThaler Behavioral Small-Cap Equity Fund (FTHSX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-K. | John Hancock Bond Fund Class I (JHBIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-L. | John Hancock Funds Disciplined Value Mid Cap Fnd Class I (JVMIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-M. | John Hancock Funds International Growth Fund Class I (GOGIX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 2-N. | Nomura Large Cap Growth Inst (IYGIX) (was Macquarie) | $5,001 - $15,000 | Dividend | $50,001 - $100,000 | Cash/Market |
| 2-O. | MFS International Equity I (MIEKX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 2-P. | MFS Limited Maturity I (MQLIX) | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jan 13, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 2-Q. | MFS Mid Cap Value Fund Class I (MCVIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-R. | MFS New Discovery Value Fund Class I (NDVIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |

| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 2-S. | MFS Total Return Bd I (MRBIX) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jan 13, 2025 $15,000 or less | | | | |
| 2-T. | MFS Value Fund Class I (MEIIX) | $5,001 - $15,000 | Dividend | $50,001 - $100,000 | Cash/Market |
| 2-U. | PIMCO Income Fund Class I-2 (PONPX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-V. | PIMCO Mortgage Opportunities and Bond Fund Class I-2 (PMZPX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 13, 2025 $15,000 or less | | | | |
| 2-W. | Principal Global Real Estate Securities Fund Instl Class (POSIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-X. | Principal MidCap Fund Institutional Class (PCBIX) | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 2-Y. | T. Rowe Price Integrated U.S. Small-Cap Growth Equity Fund (PRDS | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-Z. | T. Rowe Price Small-Cap Value Fund (PRSVX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 2-AA. | T. Rowe Price Value Fund (TRVLX) | $2,501 - $5,000 | Dividend | $50,001 - $100,000 | Cash/Market |
| 2-AB. | TCW MetWest Total Return Bond Fund Class I (MWTIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 13, 2025 $15,000 or less | | | | |
| 3. | **(H) Account 2** | | | | |
| 3-A. | T. Rowe Price US Equity Research | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Additional Explanation**: The ticker symbol for this asset is (TSPA) | | | | |
| 3-B. | AB Small Cap Growth Portfolio Advisor Class (QUAYX) | | None | $15,000 or less | Cash/Market |
| 3-C. | Allspring Core Plus Bond Fund Class Institutional (WIPIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-D. | Brown Advisory Sustainable Growth Fund Inv (BIAWX) | $5,001 - $15,000 | Gain | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jan 3, 2025 $15,001 - $50,000 | | | | |
| 3-E. | Cohen & Steers Real Estate Securities Fund (CSDIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-F. | Cohen & Steers Realty Shs Inc (CSRSX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-G. | Fidelity Adv Equity Grw I (EQPGX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 3, 2025 $15,001 - $50,000 | | | | |
| 3-H. | FullerThaler Behavioral Small-Cap Equity Fund (FTHSX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-I. | John Hancock Bond Fund Class I (JHBIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-J. | John Hancock Funds Disciplined Value Mid Cap Fund Class I (JVMIX | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-K. | John Hancock Funds International Growth Fund Class I (GOGIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-L. | Nomura Large Cap Growth Inst (IYGIX) (was Macquarie) | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 3-M. | MFS International Equity I (MIEKX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-N. | MFS International Intrinsic Value Fund Class I (MINIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-O. | MFS Mid Cap Value Fund Class I (MCVIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-P. | MFS New Discovery Value Fund Class I (NDVIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-Q. | MFS Total Return Bd I (MRBIX) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jan 13, 2025 $15,000 or less | | | | |
| 3-R. | MFS Value Fund Class I (MEIIX) | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |

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| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 3-S. | PIMCO Income Fund Class I-2 (PONPX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-T. | Principal Global Real Estate Securities Fund Instl Class (POSIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-U. | Principal MidCap Fund Institutional Class (PCBIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-V. | T. Rowe Price Int Sm Cap U.S. Small-Cap Growth Equity Fund (PRDS | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-W. | T. Rowe Price Value Fund (TRVLX) | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 3-X. | TCW MetWest Total Return Bond Fund Class I (MWTIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |

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

| | | | | | |
|---|---|---|---|---|---|
| 4. | **(H) Account #3** | | | | |
| 4-A. | T. Rowe Price US Equity Research<br>**Additional Explanation**: The ticker symbol for this asset is (TSPA) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-B. | AB Small Cap Growth Portfolio Advisor Class (QUAYX) | | None | $15,000 or less | Cash/Market |
| 4-C. | Allspring Core Plus Bond Fund Class Institutional (WIPIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-D. | Brown Advisory Sustainable Growth Fund Inv (BIAWX) | $5,001 - $15,000 | Gain | | |

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

| | | | | | |
|---|---|---|---|---|---|
| 4-E. | Cohen & Steers Real Estate Sec Fund, Inc. Class Instl (CSDIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-F. | Fidelity Adv Equity Grw I (EQPGX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

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

| | | | | | |
|---|---|---|---|---|---|
| 4-G. | John Hancock Funds Disciplined Value Mid Cap Fund Class I (JVMIX | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-H. | John Hancock Funds International Growth Fund Class I (GOGIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-I. | Nomura Large Cap Growth Inst (IYGIX) (was Macquarie) | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 4-J. | MFS International Equity I (MIEKX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-K. | MFS Mid Cap Value Fund Class I (MCVIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-L. | MFS New Discovery Value Fund Class I (NDVIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-M. | MFS Total Return Bd I (MRBIX) | $1,000 or less | Dividend | | |

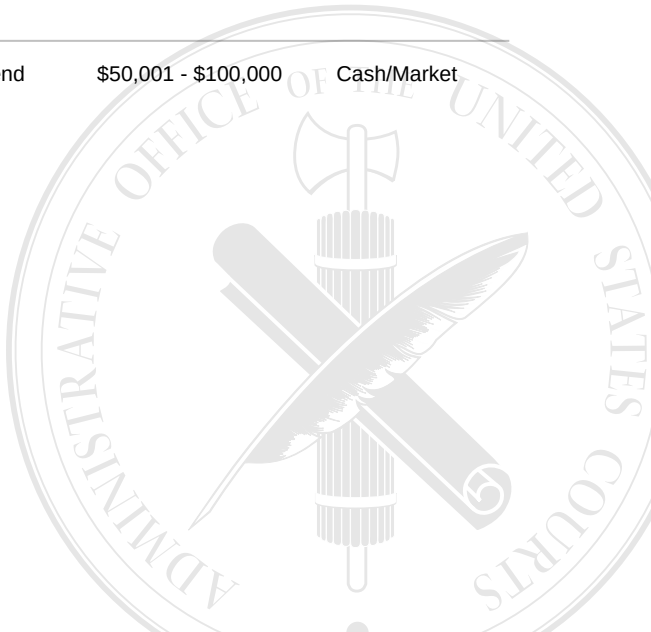
| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jan 13, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 4-N. | MFS Value Fund Class I (MEIIX) | $1,001 - $2,500 | Dividend | $15,000 or less | Cash/Market |
| 4-O. | Principal Global Real Estate Securities Fund Instl Class (POSIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-P. | Principal MidCap Fund Institutional Class (PCBIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-Q. | T. Rowe Price Integrated U.S. Small-Cap Growth Equty Fnd (PRDSX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-R. | T. Rowe Price Value Fund (TRVLX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4-S. | TCW MetWest Total Return Bond Fund Class I (MWTIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |

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

| | | | | | |
|---|---|---|---|---|---|
| 5. | **(H) Account #4** | | | | |
| 5-A. | T. Rowe Price US Equity Research<br>**Additional Explanation**: The ticker symbol for this asset is (TSPA) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 5-B. | AB Small Cap Growth Portfolio Advisor Class (QUAYX) | | None | $15,000 or less | Cash/Market |

| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 5-C. | Allspring Core Plus Bond Fund Class Institutional (WIPIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-D. | Brown Advisory Sustainable Growth Fund Inv (BIAWX) | $5,001 - $15,000 | Dividend,Gain | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jan 3, 2025 $15,001 - $50,000 | | | | |
| 5-E. | Cohen & Steers Real Estate Sec Fund, Inc. Class Instl (CSDIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-F. | Fidelity Adv Equity Grw I (EQPGX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 3, 2025 $15,001 - $50,000 | | | | |
| 5-G. | FullerThaler Behavioral Small-Cap Equity Fund (FTHSX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-H. | John Hancock Funds Disciplined Value Mid Cap Fnd Class I (JVMIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-I. | John Hancock Funds International Growth Fund Class I (GOGIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-J. | Nomura Large Cap Growth Inst (IYGIX) (was Macquarie) | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 5-K. | MFS International Equity I (MIEKX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-L. | MFS Mid Cap Value Fund Class I (MCVIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-M. | MFS New Discovery Value Fund Class I (NDVIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-N. | MFS Total Return Bd I (MRBIX) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jan 13, 2025 $15,000 or less | | | | |
| 5-O. | MFS Value Fund Class I (MEIIX) | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 5-P. | Pimco Income I2 (PONPX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-Q. | Principal Global Real Estate Securities Fund Instl Class (POSIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-R. | Principal MidCap Fund Institutional Class (PCBIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-S. | T. Rowe Price Value Fund (TRVLX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 5-T. | T. Rowe Price Integrated U.S. Small-Cap Growth Eqity Fnd (PRDSX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 5-U. | TCW MetWest Total Return Bond Fund Class I (MWTIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 13, 2025 $15,000 or less | | | | |
| 6. | **(H) Account #5** | | | | |
| 6-A. | Alger Spectra Fund A (SPECX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 6-B. | MFS Value Fund A (MEIAX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 7. | **(H) Account #6** | | | | |
| 7-A. | MSILF Government PTF Inst Money Market Fund (MVRXX) (cash eq.) | $5,001 - $15,000 | 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) | Feb 10, 2025 | $15,000 or less |
| (2). | Buy (add'l) | Mar 6, 2025 | $15,000 or less |
| (3). | Sold (part) | May 12, 2025 | $50,001 - $100,000 |
| (4). | Buy (add'l) | May 13, 2025 | $15,000 or less |
| (5). | Sold (part) | May 14, 2025 | $15,001 - $50,000 |
| (6). | Sold (part) | May 30, 2025 | $15,001 - $50,000 |
| (7). | Sold | Jun 20, 2025 | $500,001 - $1,000,000 |
| (8). | Buy | Oct 28, 2025 | $100,001 - $250,000 |
| (9). | Sold (part) | Dec 1, 2025 | $15,000 or less |
| (10). | Sold (part) | Dec 17, 2025 | $15,000 or less |
| (11). | Sold (part) | Dec 24, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 7-B. | Blue Owl Credit Inc Corp | $5,001 - $15,000 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Oct 27, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8. | **(H) Account #7** | | | | |
| 8-A. | Morgan Stanley Bank (cash) | $1,000 or less | Interest | $15,001 - $50,000 | Cash/Market |
| 8-B. | T. Rowe Price US Equity Research | $1,001 - $2,500 | Dividend,Gain | $15,000 or less | Cash/Market |

**Additional Explanation**: The ticker symbol for this asset is (TSPA)

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 20, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8-C. | AB Small Cap Growth Portfolio Advisor Class (QUAYX) | $1,000 or less | Dividend,Gain | | |

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

| | | | | | |
|---|---|---|---|---|---|
| 8-D. | Allspring Core Plus Bond Fund Class Institutional (WIPIX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 20, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8-E. | American Funds Strategic Bond Fund Class F-2 (ANBFX) | $1,001 - $2,500 | Dividend,Gain | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 20, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8-F. | Artisan High Income Adv (APDFX) | $1,000 or less | Dividend,Gain | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Apr 25, 2025 | $15,000 or less |
| (2). | Sold | Jun 20, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 8-G. | Brown Advisory Sustainable Growth Fund Inv (BIAWX) | $15,001 - $50,000 | Dividend,Gain | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jan 13, 2025 | $15,000 or less |
| (2). | Sold (part) | Mar 17, 2025 | $15,000 or less |
| (3). | Sold (part) | Jun 20, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8-H. | Cohen & Steers Real Estate Securities Fund (CSDIX) | $1,000 or less | Dividend,Gain | | |

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

| | | | | | |
|---|---|---|---|---|---|
| 8-I. | Cohen & Steers Realty Shares Fund Class L (CSRSX) | $1,000 or less | Dividend,Gain | | |

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| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|

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

| | | | | | |
|---|---|---|---|---|---|
| 8-J. | Fidelity Adv Equity Grw I (EQPGX) | $1,000 or less | Dividend,Gain | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Jan 13, 2025 | $15,000 or less |
| (2). | Buy (add'l) | Mar 17, 2025 | $15,000 or less |
| (3). | Sold (part) | Jun 20, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8-K. | FullerThaler Behavioral Small-Cap Equity Fund (FTHSX) | $1,001 - $2,500 | Dividend,Gain | | |

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

| | | | | | |
|---|---|---|---|---|---|
| 8-L. | John Hancock Bond Fund Class I (JHBIX) | $1,001 - $2,500 | Dividend,Gain | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 20, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8-M. | John Hancock Funds Disciplined Value Mid Cap Fnd Class I (JVMIX) | $1,001 - $2,500 | Dividend,Gain | | |

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

| | | | | | |
|---|---|---|---|---|---|
| 8-N. | John Hancock Funds International Growth Fund Class I (GOGIX) | $2,501 - $5,000 | Dividend,Gain | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 20, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8-O. | John Hancock Inv Grade Bond I (TIUSX) | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jan 13, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 8-P. | Lord Abbett Core Plus Bond I (LAPIX) | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jan 13, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 8-Q. | Lord Abbett Income I (LAUYX) | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jan 13, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 8-R. | Nomura Large Cap Growth Inst (IYGIX) | $5,001 - $15,000 | Dividend,Gain | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 20, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8-S. | MFS International Equity I (MIEKX) | $2,501 - $5,000 | Dividend,Gain | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 20, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8-T. | MFS Limited Maturity I (MQLIX) | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jan 13, 2025 | $15,001 - $50,000 |

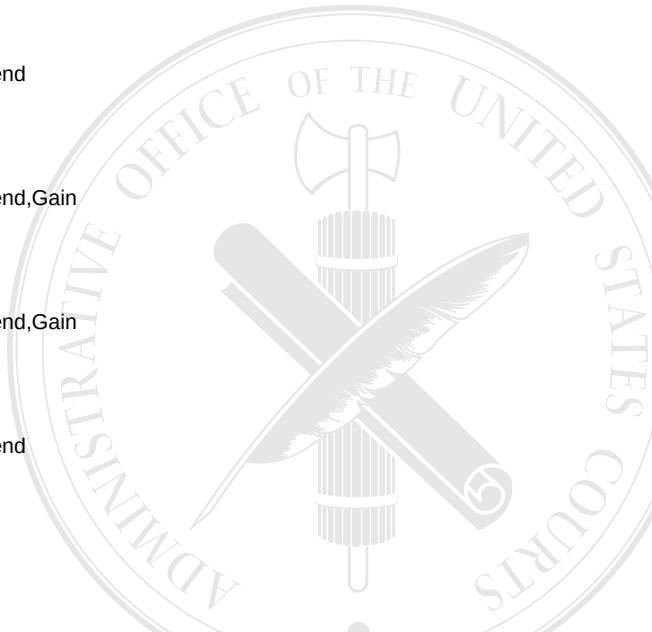
| | | | | | |
|---|---|---|---|---|---|
| 8-U. | MFS Mid Cap Value Fund Class I (MCVIX) | $1,000 or less | Dividend,Gain | | |

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

| | | | | | |
|---|---|---|---|---|---|
| 8-V. | MFS New Discovery Value Fund Class I (NDVIX) | $1,000 or less | Dividend,Gain | | |

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

| | | | | | |
|---|---|---|---|---|---|
| 8-W. | MFS Total Return Bd I (MRBIX) | $1,000 or less | Dividend | | |



| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jan 13, 2025 $15,001 - $50,000 | | | | |
| 8-X. | MFS Value Fund Class I (MEIIX) | $5,001 - $15,000 | Dividend,Gain | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jun 20, 2025 $15,001 - $50,000 | | | | |
| 8-Y. | Pimco GNMA & Gov Securities I2 (PPGNX) | $1,000 or less | Dividend,Gain | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 13, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Apr 25, 2025 $15,000 or less | | | | |
| | (3). Sold Jun 20, 2025 $15,000 or less | | | | |
| 8-Z. | Pimco Income I2 (PONPX) | $1,001 - $2,500 | Dividend,Gain | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jun 20, 2025 $15,001 - $50,000 | | | | |
| 8-AA. | Pimco Intl Bond USD Hedged I2 (PFBPX) | $1,000 or less | Dividend,Gain | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jun 20, 2025 $15,001 - $50,000 | | | | |
| 8-AB. | Pimco Mortgage Opp & Bd I2 (PMZPX) | $1,000 or less | Dividend,Gain | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 13, 2025 $15,001 - $50,000 | | | | |
| | (2). Sold (part) Jun 20, 2025 $15,001 - $50,000 | | | | |
| 8-AC. | Pimco Short Term I2 (PTSPX) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 20, 2025 $15,000 or less | | | | |
| 8-AD. | Principal Global Real Estate Securities Fund Instl Class (POSIX) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 20, 2025 $15,000 or less | | | | |
| 8-AE. | Principal MidCap Fund Institutional Class (PCBIX) | $2,501 - $5,000 | Dividend,Gain | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jun 20, 2025 $15,000 or less | | | | |
| 8-AF. | T. Rowe Price Integrated U.S. Small-Cap Growth Equity Fund (PRDS | $1,000 or less | Dividend,Gain | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 20, 2025 $15,000 or less | | | | |
| 8-AG. | T Rowe Price Sm Cap Value (PRSVX) | $1,000 or less | Dividend,Gain | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 20, 2025 $15,000 or less | | | | |
| 8-AH. | T. Rowe Price Value Fund (TRVLX) | $5,001 - $15,000 | Dividend,Gain | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jun 20, 2025 $15,001 - $50,000 | | | | |
| 8-AI. | TCW Emerging Markets Income I (TGEIX) | $1,000 or less | Dividend,Gain | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 13, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Jun 20, 2025 $15,000 or less | | | | |
| 8-AJ. | TCW MetWest Total Return Bond Fund Class I (MWTIX) | $1,001 - $2,500 | Dividend,Gain | $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 | Jan 13, 2025 | $15,001 - $50,000 |
| (2). | Sold (part) | Jun 20, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 8-AK. | TCW Metropolitan West Unconstrained Bond I (MWCIX) | $1,000 or less | Dividend,Gain | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Jan 13, 2025 | $15,000 or less |
| (2). | Sold (part) | Jun 20, 2025 | $15,000 or less |

| | | | |
|---|---|---|---|
| 9. | **(H) Account #8** | | |
| 9-A. | American Funds AMCAP Fund Class 529-A (CAFAX) | $1,001 - $2,500 | Dividend,Gain |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jul 30, 2025 | $15,000 or less |
| (2). | Sold | Dec 22, 2025 | $15,000 or less |

| | | | |
|---|---|---|---|
| 9-B. | American Funds The Growth Fund of America Class 529-A (CGFAX) | $1,001 - $2,500 | Dividend,Gain |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jul 30, 2025 | $15,000 or less |
| (2). | Sold | Dec 22, 2025 | $15,000 or less |

| | | | |
|---|---|---|---|
| 9-C. | American Funds Investment Company of America Class 529-A (CICAX) | $2,501 - $5,000 | Dividend,,Gain |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jul 30, 2025 | $15,000 or less |
| (2). | Sold | Dec 22, 2025 | $15,000 or less |

| | | | |
|---|---|---|---|
| 9-D. | American Funds New Perspective Fund Class 529-A (CNPAX) | $1,001 - $2,500 | Dividend,Gain |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jul 30, 2025 | $15,000 or less |
| (2). | Sold | Dec 22, 2025 | $15,000 or less |

| | | | |
|---|---|---|---|
| 9-E. | American Funds Cap World Growth & Income (CWIAX) | $1,000 or less | Dividend,Gain |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jul 30, 2025 | $15,000 or less |

| | | | |
|---|---|---|---|
| 10. | **(H) Account #9** | | |
| 10-A. | American Funds AMCAP Fund Class 529-A (CAFAX) | $1,000 or less | Gain |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | May 12, 2025 | $15,000 or less |

| | | | |
|---|---|---|---|
| 10-B. | American Funds The Growth Fund of America Class 529-A (CGFAX) | $1,000 or less | Gain |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | May 12, 2025 | $15,000 or less |

| | | | |
|---|---|---|---|
| 10-C. | American Funds Investment Company of America Class 529-A (CICAX) | $1,000 or less | Dividend,Gain |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | May 12, 2025 | $15,000 or less |

| | | | |
|---|---|---|---|
| 10-D. | American Funds New Perspective Fund Class 529-A (CNPAX) | $1,000 or less | Gain |

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| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | May 12, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 11. | **(H) Account #10** | | | | |
| 11-A. | American Funds AMCAP Fund Class 529-A (CAFAX) | | $1,000 or less | Dividend,Gain | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Aug 4, 2025 | $15,000 or less |
| (2). | Sold | Dec 16, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 11-B. | American Funds The Growth Fund of America Class 529-A (CGFAX) | | $1,001 - $2,500 | Dividend,Gain | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Aug 4, 2025 | $15,000 or less |
| (2). | Sold (part) | Aug 25, 2025 | $15,000 or less |
| (3). | Sold | Dec 16, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 11-C. | American Funds Investment Company of America Class 529-A (CICAX) | | $1,001 - $2,500 | Dividend,Gain | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Aug 4, 2025 | $15,000 or less |
| (2). | Sold (part) | Aug 25, 2025 | $15,000 or less |
| (3). | Sold | Dec 16, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 11-D. | American Funds New Perspective Fund Class 529-A (CNPAX) | | $1,000 or less | Dividend,Gain | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Aug 4, 2025 | $15,000 or less |
| (2). | Sold | Dec 16, 2025 | $15,000 or less |

## VIII. Additional Information or Explanations

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