AO 10
Rev. 1/2022

FINANCIAL DISCLOSURE REPORT
FOR CALENDAR YEAR 2024

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 101-111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Engelmayer, Paul A.	U.S. District Court, Southern District of New York	05/12/2025
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Judge	**5a. Report Type (check appropriate type)** ☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	**6. Reporting Period** 01/01/2024 **to** 12/31/2024
7. Chambers or Office Address Thurgood Marshall United States Courthouse 40 Centre Street New York, NY 10007		

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.	Trustee	Trust #1
2.	Trustee	Trust #2
3.	Trustee	Trust #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.		
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	Pension from U.S. Office of Personnel Management	$12,055.00
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.		
2.		
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.	Harvard Law School - 1st Year Law Class	01/07/2024 - 01/08/2024	Cambridge, MA	Instructor of Class	Travel and Lodging
2.	Harvard Law School - White Collar Crime Class	04/01/2024 - 04/01/2024	Cambridge, MA	Instructor of Class	Travel
3.	Harvard Law Review Trustees Meeting	11/22/2024 - 11/22/2024	Cambridge, MA	Attendee at Meeting	Travel and Food
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
Engelmayer, Paul A.	05/12/2025

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. Brokerage #1 (H)									
2. Berkshire Hathaway Inc Del A		None	P2	T					
3. First Eagle Global Inst CL I	E	Int./Div.	N	T	Sold (part)	12/10/24	K	A	
4. FPA Crescent	E	Int./Div.	N	T					
5. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T	Buy (add'l)	01/11/24	J		
6.					Buy (add'l)	04/26/24	J		
7.					Sold (part)	05/21/24	J		
8.					Buy (add'l)	07/01/24	K		
9.					Sold (part)	07/11/24	K		
10.					Buy (add'l)	10/02/24	K		
11.					Sold (part)	10/18/24	K		
12. Stratified LargeCap Index ETF	F	Int./Div.	P1	T					
13. Westwood Salient MLP & Engy Infras Inst	E	Int./Div.	O	T					
14. Brokerage #10 (H)									
15. Aberdeen Emerging Markets Instl		None			Sold	01/31/24	J		
16. Baird Aggregate Bond Instl	A	Int./Div.			Sold	05/21/24	J	A	
17. BlackRock Ultra Short-Term Bond ETF	A	Int./Div.			Sold	05/21/24	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; 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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☐ 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. Fidelity 500 Index Fund	A	Int./Div.	J	T					
19. Fidelity Contrafund	A	Int./Div.	J	T					
20. Fidelity Total Market Index Fund	A	Int./Div.	J	T					
21. First Eagle Global Inst CL I	A	Int./Div.	J	T					
22. Ishares Core MSCI EAFE ETF		None			Sold	05/21/24	J	A	
23. iShares Trust Barclays Short Treasury Bond Fund	A	Int./Div.			Sold	05/21/24	J		
24. Jpmorgan Ultra Short Income Etf	A	Int./Div.			Sold	05/21/24	J		
25. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T	Buy (add'l)	05/22/24	J		
26.					Buy (add'l)	10/02/24	J		
27. SPDR S&P 500 ETF	A	Int./Div.	J	T					
28. Spdr Ser Tr S&P 500 Value Etf	A	Int./Div.	J	T					
29. Vanguard Emerging Market		None			Sold	01/31/24	K		
30. Vanguard Intermediate Term Tax Exempt	A	Int./Div.			Sold	05/21/24	J		
31. Vanguard Total Stock Market ETF	A	Int./Div.	K	T	Buy (add'l)	01/31/24	K		
32. WCM Focused International Growth Instl	C	Int./Div.	K	T	Buy (add'l)	05/22/24	J		
33. WisdomTree U.S. MidCap Dividend	A	Int./Div.	J	T					
34. WisdomTree US LargeCap Dividend ETF	A	Int./Div.	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)
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35. Brokerage #11 (H)									
36. Aberdeen Emerging Markets Instl		None			Sold	01/31/24	J		
37. Berkshire Hathaway Inc Del B		None	M	T					
38. First Eagle Global Inst CL I	B	Int./Div.	K	T					
39. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T					
40. Vanguard Total Stock Market ETF	A	Int./Div.	J	T	Buy (add'l)	01/31/24	J		
41. WisdomTree US LargeCap Dividend ETF	A	Int./Div.	K	T					
42. Brokerage #12 (H)									
43. Blue Owl GP Stakes IV (A) Onshore	F	Distribution	N	T					
44. Brokerage #13 (H)									
45. Forsyth Cnty Ga Sd 5%35 Go Utx Due 02/01/35	D	Int./Div.	M	T					
46. Irving Tex 5% Go Ltx Due 09/15/33	D	Int./Div.	M	T					
47. Nassau Cn Ny 5% Go Utx Due 04/01/36	C	Int./Div.	M	T					
48. New York City Transitional Fin 5% 08/01/2029	C	Int./Div.	L	T					
49. New York N Y 5% Go Utx Due 03/01/39 Xtro	C	Int./Div.	M	T	Buy	02/29/24	M		
50. New York N Y 5% Go Utx Due 08/01/32	C	Int./Div.			Sold	02/29/24	M		
51. New York New York C 5% Wrsr Util Due 06/15/36	B	Int./Div.			Redeemed	06/17/24	L		

1. Income Gain Codes: (See Columns B1 and D4)
2. Value Codes (See Columns C1 and D3)
3. Value Method Codes (See Column C2)

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
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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52. New York St Dorm 5% 07/01/2038	D	Int./Div.	M	T					
53. New York St Dorm Au 5% Excise Tax Due 03/15/34		None	M	T	Buy	11/14/24	M		
54. New York St Dorm Au 5% Finl Sch Due 10/01/24	D	Int./Div.			Matured	10/01/24	M		
55. New York St Dorm Au 5% Go Utx Due 10/01/39 Assured Guaranty Mun		None	M	T	Buy	05/17/24	M		
56. New York St Dorm Au 5% Spl Tax Due 02/15/30	B	Int./Div.			Redeemed	06/14/24	M		
57. New York St Dorm Au 5% Spl Tax Due 03/15/34	D	Int./Div.	M	T					
58. New York St Dormitory Univ Edu	D	Int./Div.			Sold	05/16/24	M		
59. New York St Environ Pool Auth	D	Int./Div.	M	T					
60. New York St Pwr Aut 5% Elec Util Due 11/15/35	C	Int./Div.	M	T					
61. New York St. Dorm Auth Sales Tax 5% 03/15/2031	B	Int./Div.	K	T					
62. NY St Dorm Auth 5.25% Spl Tax Due 03/15/33	A	Int./Div.	M	T	Buy	07/16/24	M		
63. Ny St Dorm Auth Per 5%30 Spl Tax Due 02/15/30	C	Int./Div.			Redeemed	02/22/24	M		
64. Ny St Dorm Auth S/T 5% Excise Tax Due 03/15/30	C	Int./Div.			Redeemed	06/14/24	M		
65. Ny St Dorm Auth S/T 5%39 Excise Tax Due 03/15/39	C	Int./Div.	L	T					
66. Ny St Twy Auth Gen 5% Toll Tran Due 01/01/38	B	Int./Div.	M	T	Buy	01/31/24	M		
67. Nyc Ny Mun Fa W/S 5% Wrsr Util Due 06/15/27	C	Int./Div.	M	T	Buy	06/13/24	M		
68. Rochester Ny 5% Go Utx Due 07/31/25		None	M	T	Buy	07/17/24	M		

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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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69. Schwab Treasury Obligations Money Fund - Investor Shares	B	Int./Div.			Buy (add'l)	01/08/24	M		
70.					Sold (part)	02/14/24	M		
71.					Buy (add'l)	06/18/24	L		
72.					Buy (add'l)	07/10/24	L		
73.					Sold (part)	07/16/24	M		
74.					Sold (part)	07/30/24	L		
75.					Buy (add'l)	10/02/24	K		
76.					Sold	11/14/24	K		
77. Triborough Bridge & 5%32 Spl Tax Due 11/15/32	C	Int./Div.	M	T					
78. University Houston 5%35 Pub Educ Due 02/15/35	D	Int./Div.	M	T					
79. Brokerage #15 (H)									
80. Brevet Direct Lending - Short Duration Fund LP		None	N	T					
81. Brokerage #16 (H)									
82. Brevet Direct Lending - Short Duration Fund LP		None	O	T					
83. Brokerage #17 (H)									
84. JPMorgan Strategic Income Opportunities Fund I Class	A	Int./Div.	J	T					
85. Schwab Treasury Obligations Money Fund - Investor Shares	B	Int./Div.	K	T	Sold (part)	01/05/24	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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86.					Buy (add'l)	03/15/24	J		
87.					Buy (add'l)	04/26/24	J		
88.					Buy (add'l)	05/24/24	J		
89.					Buy (add'l)	06/07/24	J		
90.					Buy (add'l)	06/21/24	J		
91.					Buy (add'l)	07/15/24	J		
92.					Buy (add'l)	07/25/24	J		
93.					Buy (add'l)	10/29/24	J		
94.					Sold (part)	11/05/24	J		
95.					Buy (add'l)	12/06/24	J		
96.					Sold (part)	12/09/24	J		
97.					Sold (part)	12/18/24	J		
98. Us Treasur Nt 5% Ust Note Due 08/31/25	A	Int./Div.	J	T	Buy	08/08/24	J		
99. Us Treasury Bill Due 08/08/24		None			Matured	08/08/24	J		
100. Vanguard Total Stock Market ETF	A	Int./Div.	K	T	Buy (add'l)	01/05/24	J		
101.					Buy (add'l)	11/05/24	J		
102.					Buy (add'l)	12/09/24	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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103.					Buy (add'l)	12/18/24	J		
104. WisdomTree US LargeCap Dividend ETF	A	Int./Div.	J	T					
105. Brokerage #18 (H)									
106. Maritime Partners American Rivers Fund LLC	F	Distribution	O	T					
107. Brokerage #4 (H)									
108. Berkshire Hathaway Inc Del A		None	P2	T					
109. Berkshire Hathaway Inc Del B		None	N	T	Sold (part)	01/05/24	K	E	
110.					Sold (part)	01/09/24	K	E	
111.					Sold (part)	02/23/24	J	D	
112.					Sold (part)	03/27/24	K	E	
113.					Sold (part)	04/22/24	L	F	
114.					Sold (part)	08/15/24	K	E	
115.					Sold (part)	08/20/24	K	E	
116.					Sold (part)	08/30/24	J	D	
117. First Eagle Global Inst CL I	E	Int./Div.	O	T	Sold (part)	12/10/24	K		
118. JPMorgan Strategic Income Opportunities Fund I Class	A	Int./Div.	J	T					
119. Parnassus Core Equity Institutional	F	Int./Div.	O	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
Engelmayer, Paul A.	05/12/2025

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)	
120. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T	Sold (part)	01/10/24	J		
121.					Buy (add'l)	02/23/24	J		
122.					Sold (part)	03/11/24	J		
123.					Buy (add'l)	04/26/24	J		
124.					Buy (add'l)	05/07/24	J		
125.					Sold (part)	05/21/24	J		
126.					Buy (add'l)	06/06/24	K		
127.					Sold (part)	06/10/24	J		
128.					Buy (add'l)	06/27/24	J		
129.					Buy (add'l)	08/02/24	J		
130.					Buy (add'l)	08/30/24	J		
131.					Sold (part)	09/10/24	K		
132.					Buy (add'l)	10/02/24	J		
133.					Sold (part)	10/07/24	J		
134.					Buy (add'l)	11/01/24	J		
135.					Buy (add'l)	12/06/24	K		
136.					Sold (part)	12/10/24	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

Name of Person Reporting	Date of Report
Engelmayer, Paul A.	05/12/2025

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)	
137. Stratified LargeCap Index ETF	E	Int./Div.	O	T					
138. Vanguard Total Stock Market ETF	A	Int./Div.	K	T					
139. WCM Focused International Growth Instl	G	Int./Div.	O	T					
140. Westwood Salient MLP & Engy Infras Inst	D	Int./Div.	N	T					
141. WisdomTree US LargeCap Dividend ETF	E	Int./Div.	P1	T					
142. Brokerage #7 (H)									
143. CapitalSpring Direct Lending Partners, LP	A	Distribution							
144. Brokerage #8 (H)									
145. Baron Growth	D	Int./Div.	L	T					
146. Fidelity Contrafund	D	Int./Div.	M	T					
147. Fidelity Low-Priced Stock Fund		None			Sold	05/21/24	L	C	
148. Schwab Treasury Obligations Money Fund - Investor Shares	C	Int./Div.	J	T	Sold (part)	01/02/24	K		
149.					Sold (part)	01/22/24	K		
150.					Sold (part)	02/21/24	K		
151.					Sold (part)	03/11/24	K		
152.					Sold (part)	04/09/24	K		
153.					Sold (part)	05/17/24	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

Name of Person Reporting	Date of Report
Engelmayer, Paul A.	05/12/2025

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)	
154.					Buy (add'l)	05/22/24	M		
155.					Sold (part)	06/12/24	K		
156.					Sold (part)	08/12/24	K		
157.					Sold (part)	10/07/24	K		
158.					Sold (part)	12/10/24	J		
159. SPDR S&P 500 ETF	B	Int./Div.	M	T					
160. SPDR S&P MidCap 400 ETF	A	Int./Div.	K	T					
161. Tweedy, Browne International Value Fund		None			Sold	05/21/24	L	E	
162. Westwood Salient MLP & Engy Infras Inst	D	Int./Div.	N	T					
163. Brokerage #9 (H)									
164. JPMorgan Strategic Income Opportunities Fund I Class	A	Int./Div.	J	T					
165. Schwab Treasury Obligations Money Fund - Investor Shares	C	Int./Div.	L	T	Sold (part)	01/05/24	J		
166.					Buy (add'l)	02/02/24	J		
167.					Buy (add'l)	03/01/24	J		
168.					Buy (add'l)	04/12/24	J		
169.					Sold (part)	04/26/24	J		
170.					Buy (add'l)	05/07/24	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
Engelmayer, Paul A.	05/12/2025

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.)*

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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)	
171.					Sold (part)	05/22/24	J		
172.					Buy (add'l)	06/07/24	J		
173.					Sold (part)	06/27/24	J		
174.					Buy (add'l)	07/01/24	J		
175.					Buy (add'l)	08/02/24	J		
176.					Sold (part)	08/08/24	J		
177.					Buy (add'l)	08/30/24	J		
178.					Buy (add'l)	09/11/24	J		
179.					Buy (add'l)	10/02/24	J		
180.					Buy (add'l)	11/01/24	J		
181.					Sold (part)	11/05/24	J		
182.					Buy (add'l)	12/06/24	J		
183.					Sold (part)	12/09/24	J		
184.					Sold (part)	12/18/24	J		
185. SPDR Blmbg 1-3 Mth T-Bill ETF	A	Int./Div.	J	T					
186. Us Treasur Nt 5% Ust Note Due 08/31/25	A	Int./Div.	K	T	Buy	08/08/24	K		
187. Us Treasury Bill Due 08/08/24		None			Matured	08/08/24	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

Name of Person Reporting	Date of Report
Engelmayer, Paul A.	05/12/2025

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.)*

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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)	
188. Vanguard Short Term Federal Fd Admiral Shares	A	Int./Div.	K	T					
189. Vanguard Total Stock Market ETF	A	Int./Div.	K	T	Buy (add'l)	01/05/24	J		
190.					Buy (add'l)	11/05/24	J		
191.					Buy (add'l)	12/09/24	J		
192.					Buy (add'l)	12/18/24	J		
193. WisdomTree US LargeCap Dividend ETF	A	Int./Div.	J	T					
194. Brokerage #19 (H)									
195. Aberdeen Emerging Markets Instl		None			Sold	01/31/24	J		
196. Baird Aggregate Bond Instl	A	Int./Div.			Sold	05/21/24	J	A	
197. BlackRock Ultra Short-Term Bond ETF	A	Int./Div.			Sold	05/21/24	J		
198. Fidelity 500 Index Fund	A	Int./Div.	J	T					
199. Fidelity Contrafund	A	Int./Div.	J	T					
200. Fidelity Total Market Index Fund	A	Int./Div.	J	T					
201. First Eagle Global Inst CL I	A	Int./Div.	J	T					
202. Ishares Core MSCI EAFE ETF		None			Sold	05/21/24	J	A	
203. iShares Trust Barclays Short Treasury Bond Fund	A	Int./Div.			Sold	05/21/24	J		
204. Jpmorgan Ultra Short Income Etf	A	Int./Div.			Sold	05/21/24	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; 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.)*

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205. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T	Buy (add'l)	05/22/24	J		
206.					Buy (add'l)	10/02/24	J		
207. SPDR S&P 500 ETF	A	Int./Div.	J	T					
208. Spdr Ser Tr S&P 500 Value Etf	A	Int./Div.	J	T					
209. Vanguard Emerging Market		None			Sold	01/31/24	K		
210. Vanguard Intermediate Term Tax Exempt	A	Int./Div.			Sold	05/21/24	J		
211. Vanguard Total Stock Market ETF	A	Int./Div.	K	T	Buy (add'l)	01/31/24	K		
212. WCM Focused International Growth Instl	C	Int./Div.	K	T	Buy (add'l)	05/22/24	J		
213. WisdomTree U.S. MidCap Dividend	A	Int./Div.	J	T					
214. WisdomTree US LargeCap Dividend ETF	A	Int./Div.	K	T					
215. Brokerage #20 (H)									
216. Aberdeen Emerging Markets Instl		None			Sold	01/31/24	J		
217. Berkshire Hathaway Inc Del B		None	M	T					
218. First Eagle Global Inst CL I	B	Int./Div.	K	T					
219. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T					
220. Vanguard Total Stock Market ETF	A	Int./Div.	J	T	Buy (add'l)	01/31/24	J		
221. WisdomTree US LargeCap Dividend ETF	A	Int./Div.	K	T					

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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

3. Value Method Codes (See Column C2)
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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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222. Brokerage #2 (H)									
223. Schwab Treasury Obligations Money Fund - Investor Shares	B	Int./Div.	M	T	Sold (part)	01/05/24	J		
224.					Sold (part)	01/09/24	K		
225.					Sold (part)	01/11/24	J		
226.					Buy (add'l)	01/23/24	K		
227.					Sold (part)	02/06/24	K		
228.					Buy (add'l)	02/22/24	J		
229.					Buy (add'l)	03/01/24	K		
230.					Buy (add'l)	04/01/24	K		
231.					Sold (part)	04/08/24	K		
232.					Sold (part)	04/09/24	K		
233.					Sold (part)	04/22/24	J		
234.					Buy (add'l)	04/26/24	K		
235.					Buy (add'l)	05/07/24	J		
236.					Buy (add'l)	06/06/24	J		
237.					Buy (add'l)	07/01/24	J		
238.					Sold (part)	07/30/24	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
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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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239.					Buy (add'l)	08/02/24	J		
240.					Buy (add'l)	08/16/24	K		
241.					Buy (add'l)	08/21/24	K		
242.					Sold (part)	08/23/24	K		
243.					Buy (add'l)	09/03/24	J		
244.					Sold (part)	09/09/24	K		
245.					Sold (part)	09/16/24	J		
246.					Buy (add'l)	10/02/24	K		
247.					Buy (add'l)	11/01/24	J		
248.					Sold (part)	11/13/24	J		
249.					Buy (add'l)	12/06/24	J		
250.					Buy (add'l)	12/11/24	M		
251.					Sold (part)	12/12/24	K		
252.					Buy (add'l)	12/24/24	J		
253.					Sold (part)	12/31/24	L		
254. IRA #11 (H)									
255. Brevet Direct Lending - Short Duration Fund Ltd		None	N	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
Engelmayer, Paul A.	05/12/2025

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. IRA #6 (H)									
257. Orthogon Partners II LP Offshore	E	Distribution	M	T					
258. CapitalSpring Investment Partners V Parallel III, LP	C	Distribution	N	T					
259. Schwab Treasury Obligations Money Fund - Investor Shares	B	Int./Div.	K	T	Buy (add'l)	01/11/24	J		
260.					Sold (part)	05/21/24	L		
261.					Buy (add'l)	06/28/24	K		
262.					Buy (add'l)	11/22/24	J		
263.					Buy (add'l)	12/06/24	J		
264. IRA#1 Roth1 (H)									
265. SKK Ventures QP, LLC - BD2 (NanoDx)		None	M	T					
266. SKK 9i Ventures QP, LLC QM0 (QMENTA)		None	L	T	Buy	06/13/24	L		
267. First Eagle Global Inst CL I	B	Int./Div.	K	T					
268. Schwab Treasury Obligations Money Fund - Investor Shares	D	Int./Div.	M	T	Sold (part)	01/31/24	K		
269.					Sold (part)	03/01/24	J		
270.					Sold (part)	04/01/24	J		
271.					Sold (part)	05/01/24	J		
272.					Buy (add'l)	05/22/24	L		

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
Engelmayer, Paul A.	05/12/2025

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.					Sold (part)	06/03/24	L		
274.					Sold (part)	07/01/24	J		
275.					Sold (part)	08/01/24	J		
276.					Sold (part)	09/03/24	J		
277.					Sold (part)	10/01/24	J		
278.					Sold (part)	11/01/24	J		
279.					Sold (part)	12/02/24	J		
280. Us Treasur Nt 5% Ust Note Due 08/31/25	A	Int./Div.	J	T	Buy	08/08/24	J		
281. Us Treasury Bill Due 08/08/24		None			Matured	08/08/24	J		
282. Vanguard Total Stock Market ETF	C	Int./Div.	N	T	Buy (add'l)	01/31/24	K		
283.					Buy (add'l)	03/01/24	J		
284.					Buy (add'l)	04/01/24	J		
285.					Buy (add'l)	05/01/24	J		
286.					Buy (add'l)	06/03/24	J		
287.					Buy (add'l)	07/01/24	J		
288.					Buy (add'l)	08/01/24	J		
289.					Buy (add'l)	09/03/24	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
Engelmayer, Paul A.	05/12/2025

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)	
290.					Buy (add'l)	10/01/24	J		
291.					Buy (add'l)	11/01/24	J		
292.					Buy (add'l)	12/02/24	J		
293. Victory Global Energy Transition Y	B	Int./Div.	M	T					
294. Westwood Salient MLP & Engy Infras Inst	A	Int./Div.	K	T					
295. IRA#1 Roth2 (H)									
296. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T					
297. Us Treasur Nt 5% Ust Note Due 08/31/25	A	Int./Div.	K	T	Buy	08/08/24	K		
298. Us Treasury Bill Due 08/08/24		None			Matured	08/08/24	K		
299. Vanguard Total Stock Market ETF	A	Int./Div.	L	T					
300. WCM Focused International Growth Instl	D	Int./Div.	L	T					
301. Westwood Salient MLP & Engy Infras Inst	B	Interest	L	T					
302. IRA#1 Roth3 (H)									
303. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T					
304. Vanguard Total Stock Market ETF	A	Int./Div.	K	T					
305. IRA#3 (H)									
306. First Eagle Global Inst CL I	B	Int./Div.	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
Engelmayer, Paul A.	05/12/2025

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)	
307. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T	Buy (add'l)	05/22/24	J		
308.					Sold (part)	08/08/24	J		
309.					Buy (add'l)	09/11/24	J		
310. Us Treasur Nt 5% Ust Note Due 08/31/25	A	Int./Div.	K	T	Buy	08/08/24	K		
311. Us Treasury Bill Due 08/08/24		None			Matured	08/08/24	K		
312. Vanguard Total Stock Market ETF	B	Int./Div.	M	T					
313. Victory Global Energy Transition Y	A	Int./Div.	J	T					
314. Westwood Salient MLP & Engy Infras Inst	A	Int./Div.	K	T					
315. IRA#4 (H)									
316. Carillon Reams Unconstrained Bond I		None			Sold	01/31/24	K	B	
317. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T	Buy (add'l)	05/22/24	J		
318.					Sold (part)	08/08/24	J		
319.					Buy (add'l)	08/19/24	J		
320.					Buy (add'l)	09/11/24	J		
321.					Buy (add'l)	11/22/24	J		
322.					Sold (part)	12/06/24	J		
323. Us Treasur Nt 5% Ust Note Due 08/31/25	A	Int./Div.	L	T	Buy	08/08/24	L		

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
Engelmayer, Paul A.	05/12/2025

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)	
324. Us Treasury Bill Due 08/08/24		None			Matured	08/08/24	K		
325. Vanguard Total Stock Market ETF	B	Int./Div.	M	T	Buy (add'l)	01/31/24	K		
326.					Buy (add'l)	02/01/24	J		
327. Westwood Salient MLP & Engy Infras Inst	C	Int./Div.	M	T	Buy (add'l)	01/31/24	K		
328. IRA#5 (H)									
329. Carillon Reams Unconstrained Bond I		None			Sold	01/31/24	K	A	
330. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T	Sold (part)	08/08/24	J		
331.					Buy (add'l)	09/11/24	J		
332.					Sold (part)	12/06/24	J		
333.					Sold (part)	12/18/24	J		
334. Us Treasur Nt 5% Ust Note Due 08/31/25	A	Int./Div.	L	T	Buy	08/08/24	L		
335. Us Treasury Bill Due 08/08/24		None			Matured	08/08/24	K		
336. Vanguard Total Stock Market ETF	A	Int./Div.	K	T	Buy (add'l)	01/31/24	K		
337.					Buy (add'l)	12/18/24	J		
338. Victory Global Energy Transition Y	A	Int./Div.	J	T					
339. IRA#7 (H)									
340. Alerian MLP ETF	E	Int./Div.	N	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
Engelmayer, Paul A.	05/12/2025

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)	
341. First Eagle Global Inst CL I	A	Int./Div.	J	T					
342. FPA Crescent	D	Int./Div.	M	T					
343. JPMorgan Strategic Income Opportunities Fund I Class	B	Int./Div.	K	T	Sold (part)	12/06/24	J		
344. Schwab Treasury Obligations Money Fund - Investor Shares	C	Int./Div.	L	T	Buy (add'l)	01/11/24	J		
345.					Buy (add'l)	04/26/24	J		
346.					Buy (add'l)	05/22/24	J		
347.					Buy (add'l)	06/27/24	J		
348.					Sold (part)	07/11/24	J		
349.					Sold (part)	08/08/24	J		
350.					Buy (add'l)	08/14/24	J		
351.					Buy (add'l)	08/19/24	J		
352.					Buy (add'l)	09/11/24	J		
353.					Sold (part)	10/18/24	J		
354.					Buy (add'l)	11/22/24	J		
355.					Sold (part)	12/06/24	K		
356.					Buy (add'l)	12/20/24	J		
357. Us Treasur Nt 2% Ust Note Due 08/15/25	B	Int./Div.	L	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
Engelmayer, Paul A.	05/12/2025

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)	
358. Us Treasur Nt 5% Ust Note Due 08/31/25	A	Int./Div.	M	T	Buy	08/08/24	M		
359. Us Treasury Bill Due 08/08/24		None			Matured	08/08/24	M		
360. Vanguard Total Stock Market ETF	B	Int./Div.	M	T					
361. Victory Global Energy Transition Y	A	Int./Div.	K	T					
362. Westwood Salient MLP & Engy Infras Inst	D	Int./Div.	M	T					
363. IRA#8 (H)									
364. First Eagle Global Inst CL I	D	Int./Div.	M	T	Sold (part)	12/06/24	J	B	
365. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T	Sold (part)	08/08/24	J		
366.					Buy (add'l)	09/11/24	J		
367.					Sold (part)	12/06/24	J		
368. Us Treasur Nt 5% Ust Note Due 08/31/25	A	Int./Div.	L	T	Buy	08/08/24	L		
369. Us Treasury Bill Due 08/08/24		None			Matured	08/08/24	L		
370. Vanguard Total Stock Market ETF	B	Int./Div.	M	T					
371. Trust #1 (H)									
372. Berkshire Hathaway Inc Del B		None	M	T					
373. Coho Relative Value Equity	D	Int./Div.	K	T					
374. First Eagle Global Inst CL I	B	Int./Div.	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
Engelmayer, Paul A.	05/12/2025

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)	
375. FPA Crescent	C	Int./Div.	K	T					
376. iShares MSCI Emerging Market Index Fund		None			Sold	02/01/24	J	B	
377. iShares Tr S&P 400 BARRA Midcap Growth	A	Int./Div.	K	T					
378. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T					
379. Stratified LargeCap Index ETF	A	Int./Div.	J	T					
380. Vanguard S&P 500 ETF	B	Int./Div.	M	T					
381. Vanguard Small Cap ETF	A	Int./Div.	K	T					
382. Vanguard Total Stock Market ETF	A	Int./Div.	K	T	Buy (add'l)	02/01/24	J		
383. WCM Focused International Growth Instl	D	Int./Div.	K	T					
384. Westwood Salient MLP & Engy Infras Inst	B	Int./Div.	K	T					
385. WisdomTree U.S. MidCap Dividend	A	Int./Div.	J	T					
386. WisdomTree US LargeCap Dividend ETF	B	Int./Div.	L	T					
387. Trust #2 (H)									
388. Berkshire Hathaway Inc Del B		None	M	T					
389. Coho Relative Value Equity	D	Int./Div.	K	T					
390. First Eagle Global Inst CL I	A	Int./Div.	J	T					
391. FPA Crescent	A	Int./Div.	J	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
Engelmayer, Paul A.	05/12/2025

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)	
392. iShares MSCI Emerging Market Index Fund		None			Sold	02/01/24	J	B	
393. iShares Tr S&P 400 BARRA Midcap Growth	A	Int./Div.	J	T					
394. Schwab Treasury Obligations Money Fund - Investor Shares	A	Int./Div.	J	T					
395. Vanguard S&P 500 ETF	B	Int./Div.	M	T					
396. Vanguard Small Cap ETF	A	Int./Div.	K	T					
397. Vanguard Total Stock Market ETF	A	Int./Div.	K	T	Buy (add'l)	02/01/24	J		
398. WCM Focused International Growth Instl	C	Int./Div.	K	T					
399. Westwood Salient MLP & Engy Infras Inst	B	Int./Div.	K	T					
400. WisdomTree U.S. MidCap Dividend	A	Int./Div.	J	T					
401. WisdomTree US LargeCap Dividend ETF	A	Int./Div.	K	T					
402. Trust #5 (H)									
403. Baldwinsville Ny Cs 2% Go Utx Due 10/01/25	A	Int./Div.	K	T					
404. Berkshire Hathaway Inc Del B		None	L	T					
405. Coho Relative Value Equity	D	Int./Div.	L	T					
406. Endwell NY Fire Dist (GO)	A	Int./Div.			Matured	04/15/24	L		
407. FPA Crescent	C	Int./Div.	K	T					
408. iShares MSCI Emerging Market Index Fund		None			Sold	02/01/24	J	B	

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
Engelmayer, Paul A.	05/12/2025

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)	
409. iShares Tr S&P 400 BARRA Midcap Growth	A	Int./Div.	J	T					
410. Schwab Treasury Obligations Money Fund - Investor Shares	C	Int./Div.	L	T	Sold (part)	01/05/24	J		
411.					Buy (add'l)	01/10/24	K		
412.					Sold (part)	02/01/24	J		
413.					Sold (part)	03/01/24	J		
414.					Sold (part)	04/01/24	J		
415.					Buy (add'l)	05/07/24	L		
416.					Sold (part)	06/03/24	J		
417.					Sold (part)	07/01/24	J		
418.					Sold (part)	08/01/24	J		
419.					Sold (part)	09/03/24	J		
420.					Sold (part)	10/01/24	J		
421.					Sold (part)	11/01/24	J		
422.					Sold (part)	12/02/24	J		
423. Stratified LargeCap Index ETF	C	Int./Div.	M	T	Buy (add'l)	01/05/24	J		
424. Vanguard Total Stock Market ETF	B	Int./Div.	M	T	Buy (add'l)	01/08/24	J		
425.					Buy (add'l)	02/01/24	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

Name of Person Reporting	Date of Report
Engelmayer, Paul A.	05/12/2025

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)	
426.					Buy (add'l)	03/01/24	J		
427.					Buy (add'l)	04/01/24	J		
428.					Buy (add'l)	05/01/24	J		
429.					Buy (add'l)	06/03/24	J		
430.					Buy (add'l)	07/01/24	J		
431.					Buy (add'l)	08/01/24	J		
432.					Buy (add'l)	09/03/24	J		
433.					Buy (add'l)	10/01/24	J		
434.					Buy (add'l)	11/01/24	J		
435.					Buy (add'l)	12/02/24	J		
436. Victory Global Energy Transition Y	B	Int./Div.	L	T					
437. WCM Focused International Growth Instl	D	Int./Div.	L	T					
438. Westwood Salient MLP & Engy Infras Inst	D	Int./Div.	M	T					
439. WisdomTree U.S. MidCap Dividend	A	Int./Div.	J	T					
440. WisdomTree US LargeCap Dividend ETF	A	Int./Div.	K	T					
441. Trust #6 (H)									
442. Baldwinsville Ny Cs 2% Go Utx Due 10/01/25	A	Int./Div.	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
Engelmayer, Paul A.	05/12/2025

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.)*

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443. Berkshire Hathaway Inc Del B		None	L	T					
444. Coho Relative Value Equity	D	Int./Div.	L	T					
445. Endwell NY Fire Dist (GO)	A	Int./Div.			Matured	04/15/24	L		
446. First Eagle Global Inst CL I	B	Int./Div.	K	T					
447. FPA Crescent	D	Int./Div.	L	T					
448. iShares MSCI Emerging Market Index Fund		None			Sold	02/01/24	J	B	
449. iShares Tr S&P 400 BARRA Midcap Growth	A	Int./Div.	K	T					
450. Schwab Treasury Obligations Money Fund - Investor Shares	C	Int./Div.	L	T	Sold (part)	01/05/24	J		
451.					Buy (add'l)	01/10/24	K		
452.					Sold (part)	02/01/24	J		
453.					Sold (part)	03/01/24	J		
454.					Sold (part)	04/01/24	J		
455.					Buy (add'l)	05/07/24	L		
456.					Sold (part)	06/03/24	J		
457.					Sold (part)	07/01/24	J		
458.					Sold (part)	08/01/24	J		
459.					Sold (part)	09/03/24	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
Engelmayer, Paul A.	05/12/2025

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)	
460.					Sold (part)	10/01/24	J		
461.					Sold (part)	11/01/24	J		
462.					Sold (part)	12/02/24	J		
463. Stratified LargeCap Index ETF	C	Int./Div.	M	T	Buy (add'l)	01/05/24	J		
464. Vanguard Total Stock Market ETF	B	Int./Div.	M	T	Buy (add'l)	01/08/24	J		
465.					Buy (add'l)	02/01/24	J		
466.					Buy (add'l)	03/01/24	J		
467.					Buy (add'l)	04/01/24	J		
468.					Buy (add'l)	05/01/24	J		
469.					Buy (add'l)	06/03/24	J		
470.					Buy (add'l)	07/01/24	J		
471.					Buy (add'l)	08/01/24	J		
472.					Buy (add'l)	09/03/24	J		
473.					Buy (add'l)	10/01/24	J		
474.					Buy (add'l)	11/01/24	J		
475.					Buy (add'l)	12/02/24	J		
476. Victory Global Energy Transition Y	B	Int./Div.	L	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
Engelmayer, Paul A.	05/12/2025

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.)*

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477. WCM Focused International Growth Instl	D	Int./Div.	L	T					
478. Westwood Salient MLP & Engy Infras Inst	D	Int./Div.	M	T					
479. WisdomTree U.S. MidCap Dividend	A	Int./Div.	K	T					
480. WisdomTree US LargeCap Dividend ETF	A	Int./Div.	K	T					
481. Citibank Checking Account (H)		None	K	T					
482. Chase Checking Account (H)		None	J	T					
483. Teachers Retirement System of NY 403(b) (H)									
484. Diversified Equity		None	N	T	Sold (part)	05/01/24	J		
485. Balanced		None	M	T	Sold (part)	05/01/24	J		
486. International Equity		None	L	T	Sold (part)	05/01/24	J		
487. 529 Plan #1 (H)									
488. NY 529 Global Equity Portfolio		None	K	T					
489. NY 529 Growth Stock Index Portfolio		None	L	T					
490. NY 529 Inflation-Protected Securities Portfolio		None			Sold (part)	01/08/24	J		
491.					Sold	01/29/24	J		
492. NY 529 Interest Accumulation Portfolio		None	K	T	Sold (part)	09/11/24	J		
493.					Sold (part)	09/30/24	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
Engelmayer, Paul A.	05/12/2025

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)	
494.					Sold (part)	11/04/24	J		
495.					Sold (part)	12/02/24	J		
496. NY 529 Value Stock Index Portfolio		None	L	T					
497. 529 Plan #2 (H)									
498. NY 529 Global Equity Portfolio		None	K	T					
499. NY 529 Bond Market Index Portfolio		None	J	T	Buy	11/22/24	J		
500. NY 529 Growth Stock Index Portfolio		None	K	T					
501. NY 529 Inflation-Protected Securities Portfolio		None			Sold	11/22/24	J		
502. NY 529 Interest Accumulation Portfolio		None	K	T					
503. NY 529 Value Stock Index Portfolio		None	L	T					
504. 529 Plan #3 (H)									
505. NY 529 Global Equity Portfolio		None	J	T					
506. NY 529 Bond Market Index Portfolio		None	J	T	Buy	11/22/24	J		
507. NY 529 Growth Stock Index Portfolio		None	K	T					
508. NY 529 Inflation-Protected Securities Portfolio		None			Sold	11/22/24	J		
509. NY 529 Interest Accumulation Portfolio		None	K	T					
510. NY 529 Value Stock Index Portfolio		None	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
Engelmayer, Paul A.	05/12/2025

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)	
511. 529 Plan #4 (H)									
512. NY 529 Global Equity Portfolio		None	K	T	Sold (part)	07/23/24	J		
513.					Sold (part)	12/27/24	K		
514.					Buy (add'l)	12/27/24	K		
515. NY 529 Growth Stock Index Portfolio		None	L	T	Sold (part)	07/23/24	J		
516.					Sold (part)	08/14/24	J		
517.					Sold (part)	11/04/24	J		
518.					Sold (part)	12/02/24	J		
519.					Sold (part)	12/16/24	J		
520.					Sold (part)	12/27/24	L		
521.					Buy (add'l)	12/27/24	L		
522. NY 529 Inflation-Protected Securities Portfolio		None			Sold (part)	07/08/24	J		
523.					Sold (part)	07/19/24	J		
524.					Sold (part)	07/23/24	J		
525.					Sold	07/29/24	J		
526. NY 529 Interest Accumulation Portfolio		None	L	T	Sold (part)	08/28/24	J		
527.					Sold (part)	09/30/24	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
Engelmayer, Paul A.	05/12/2025

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)	
528.					Sold (part)	12/02/24	J		
529.					Sold (part)	12/27/24	L		
530.					Buy (add'l)	12/27/24	L		
531. NY 529 Value Stock Index Portfolio		None	L	T	Sold (part)	07/23/24	J		
532.					Sold (part)	12/02/24	K		
533.					Sold (part)	12/16/24	J		
534.					Sold (part)	12/27/24	M		
535.					Buy (add'l)	12/27/24	L		

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.)*

Name of Person Reporting	Date of Report
Engelmayer, Paul A.	05/12/2025

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

Signature: **s/ Paul A. Engelmayer**

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. § 104)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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