Annual, 2024

Financial Disclosure Report (AO Form 10)

Filer's Information
Fischer, Nora Barry
U.S. District Court - Pennsylvania Western
Senior District Judge

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. Â§ 13141 et. seq., 5 U.S.C. Â§ 7353, and Judicial Conference regulations.

/s/ Fischer, Nora Barry [electronically signed on Jul 21, 2025 11:13am by Fischer, Nora Barry in JEFS]
/s/ Fischer, Nora Barry [electronically signed on Jun 11, 2025 9:48am by Fischer, Nora Barry in JEFS]

I. Positions

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

II. Agreements

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

III A. Filer Non-Investment Income

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

III B. Spouse Non-Investment Income

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	Self Employed Medical Consulting	Self Employed Medical Consultant	No	$0.00	

IV. Reimbursements

	SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	Academy of Trial Lawyers Retreat	Sep 25, 2024	Sep 27, 2024	Wharton Township, PA	Committee Meetings	Travel, 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) PNC Bank Cash Equivalent Account(s)**				
1-A.	PNC Bank Cash Equivalent Account(s)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
2.	**(H) Qualified Plan #11**				
2-A.	American Europacific Growth	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,000 or less

2-B.	Dodge & Cox Stock	$15,001 - $50,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000

2-C.	FPA New Income	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$50,001 - $100,000

2-D.	Fidelity Govt MMKT Capital	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-E.	Champlain Small Company Fund	$15,001 - $50,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Aug 16, 2024	$15,000 or less

2-F.	Southern Small-Cap N/C	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Aug 16, 2024	$15,000 or less

2-G.	Eaton Vance Floating Rate Advantage Adv	$15,001 - $50,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Mar 19, 2024	$15,000 or less

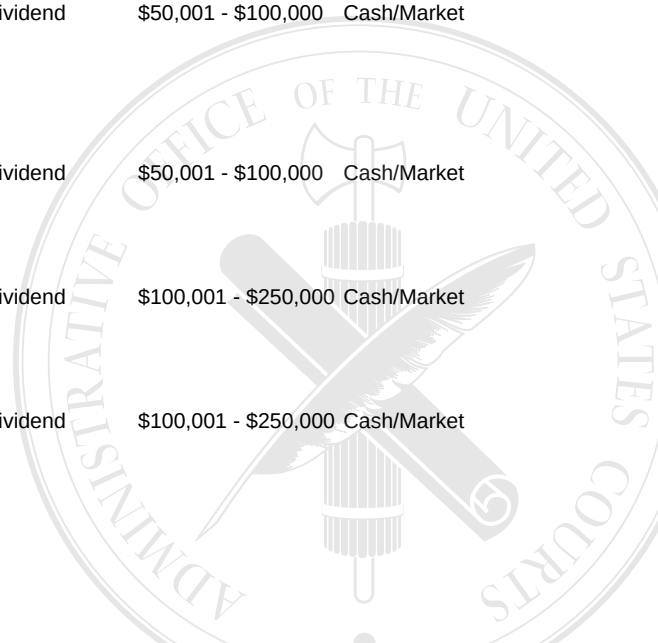
2-H.	Loomis Sayles Bond Retail Shares	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000

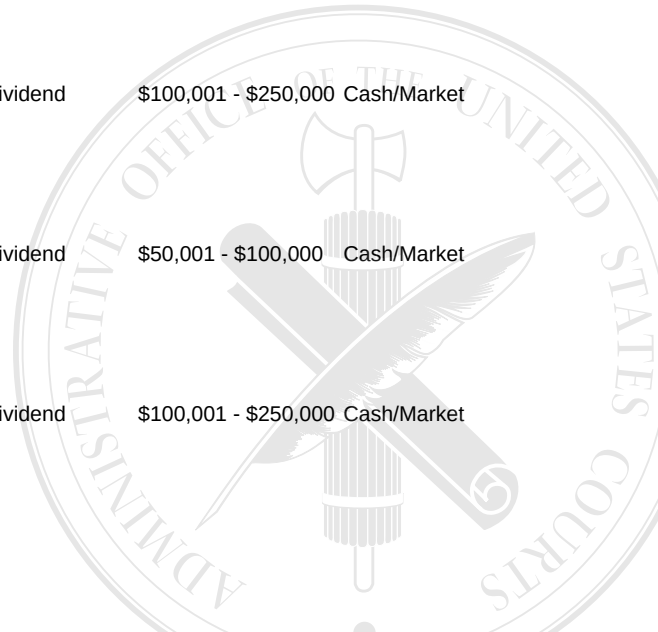
2-I.	Vanguard Short Term Invmt Grade Investor	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,000 or less

2-J.	Vanguard Short Term Federal	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,001 - $50,000				
2-K.	FPA Crescent Fund Supra Institutional Class	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
2-L.	Metropolitan West Total Ret - I sh	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
2-M.	MFS Growth I LG	$15,001 - $50,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,001 - $50,000				
	(2). Sold (part) Mar 19, 2024 $15,000 or less				
	(3). Sold (part) Jul 1, 2024 $15,000 or less				
2-N.	Thornburg Strategic Inc I	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,001 - $50,000				
	(2). Sold (part) Mar 19, 2024 $15,000 or less				
2-O.	Segall Bryant & Hamill Small Cap Grinstl (Formally Westcore Int)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,001 - $50,000				
	(2). Sold (part) Aug 16, 2024 $15,000 or less				
2-P.	Osterweis Strategic Income	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,001 - $50,000				
2-Q.	Diamond Hill Large Cap I	$15,001 - $50,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,001 - $50,000				
2-R.	PIMCO Foreign Bond Fund Hedged	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,001 - $50,000				
2-S.	JPMorgan Total Return Fund - Select	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
2-T.	JPMorgan Government Bond I	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $50,001 - $100,000				
2-U.	JPMorgan Unconstrained Debt I	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,001 - $50,000				
	(2). Sold (part) Mar 19, 2024 $15,000 or less				
2-V.	Brandywine Global Opp Bond I	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,001 - $50,000				
	(2). Buy (add'l) Jul 2, 2024 $15,000 or less				
2-W.	Parnassus Core Equity Institutional	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,001 - $50,000				
2-X.	American Century Mid Cap Value I	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,001 - $50,000				
	(2). Sold (part) Aug 16, 2024 $15,000 or less				
2-Y.	Macquarie Mid Cap Growth (Formally Delaware Ivy Mid Cap Growth)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,001 - $50,000				
	(2). Sold (part) Mar 19, 2024 $15,000 or less				
	(3). Sold (part) Aug 16, 2024 $15,000 or less				
2-Z.	Goldman Sachs GQG	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
	(2). Sold (part) Mar 19, 2024 $15,000 or less				
2-AA.	Fidelity Advisor International Small Cap Fund Class Z	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,001 - $50,000				
2-AB.	Third Avenue Real Estate Value Instl	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,001 - $50,000				
2-AC.	Virtus Newfleet Multi-Sector Short Term	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
2-AD.	Thornburg Investment Income Builder	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
2-AE.	AB Large Cap Growth Advisor Class	$15,001 - $50,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,001 - $50,000				
	(2). Sold (part) Mar 19, 2024 $15,000 or less				
	(3). Sold (part) Jul 1, 2024 $15,000 or less				
2-AF.	JHancock Disciplined Value Global Long/Short (Formally Boston P)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
2-AG.	Cromwell Centersquare Real Estate Inst	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
2-AH.	Transamerican Intil Sm Cp Val	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,000 or less				
2-AI.	Manning & Napier Rainer Intl Discv	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,000 or less				
2-AJ.	Virtus Kar Mid Cap Core Fund Class I	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,000 or less				
	(2). Sold (part) Aug 16, 2024 $15,000 or less				
3.	**(H) Qualified Plan #12**				
3-A.	Vanguard GNMA	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 2, 2024 $15,001 - $50,000				
	(2). Buy (add'l) Jul 2, 2024 $15,000 or less				
	(3). Sold (part) Dec 23, 2024 $15,001 - $50,000				
3-B.	PIMCO International Bond	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,001 - $50,000				
	(2). Sold (part) Dec 23, 2024 $15,000 or less				
3-C.	MFS International New Disc Cl A	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
3-D.	Fidelity Govt MMKT Capital	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
3-E.	Third Avenue Real Estate Value Instl	$5,001 - $15,000	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
	(2). Sold (part) Nov 14, 2024 $15,000 or less				
3-F.	Prime Cap Odyssey Growth Fund	$50,001 - $100,000	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,001 - $50,000				
	(2). Sold (part) Mar 1, 2024 $15,000 or less				
	(3). Sold Jul 1, 2024 $100,001 - $250,000				
3-G.	JPMorgan Large Cap Growth I	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jul 2, 2024 $100,001 - $250,000				
	(2). Sold (part) Dec 23, 2024 $15,000 or less				
3-H.	Sterling Capital Equity Income Instl	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jun 5, 2024 $100,001 - $250,000				
	(2). Sold (part) Dec 23, 2024 $15,000 or less				
3-I.	Diamond Hill Long-Short I	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 1, 2024 $15,000 or less				
	(2). Buy (add'l) Dec 23, 2024 $15,000 or less				
3-J.	JPMorgan Hedged Equity Class I	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jul 2, 2024 $15,000 or less				
	(2). Buy (add'l) Dec 23, 2024 $15,000 or less				
3-K.	GQG Partners Emerging Markets	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 2, 2024 $15,000 or less				
	(2). Sold (part) Oct 24, 2024 $15,000 or less				
3-L.	JOHCM International Select I	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
3-M.	Osterweis Strategic Income	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Dec 23, 2024	$15,001 - $50,000

3-N.	Osterweis Emerging Opportunity Fund	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Jul 1, 2024	$15,000 or less
(3).	Sold (part)	Aug 16, 2024	$15,000 or less
(4).	Sold (part)	Nov 14, 2024	$15,001 - $50,000

3-O.	Artisan Instl Value Fund Instl	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000

3-P.	Baron Real Estate Inst	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Nov 14, 2024	$15,000 or less

3-Q.	JPMorgan Unconstrained Debt I	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,000 or less
(2).	Sold (part)	Dec 23, 2024	$15,001 - $50,000

3-R.	PIMCO Short-Term Instl	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Dec 23, 2024	$15,001 - $50,000

3-S.	JPMorgan Equity Income I	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,000 or less
(2).	Buy (add'l)	Jul 2, 2024	$15,000 or less

3-T.	PIMCO Income Instl	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Dec 23, 2024	$15,001 - $50,000

3-U.	T. Rowe Price Mid-Cap Growth Fund I Class	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,000 or less
(2).	Sold (part)	Aug 16, 2024	$15,000 or less
(3).	Sold (part)	Nov 14, 2024	$15,001 - $50,000

3-V.	Hodges Small Cap Inst	$15,001 - $50,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Aug 16, 2024	$15,000 or less
(3).	Sold (part)	Nov 14, 2024	$15,001 - $50,000

3-W.	Dean Small Cap Value No-Load	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Aug 16, 2024	$15,000 or less
(3).	Sold (part)	Nov 14, 2024	$15,001 - $50,000

3-X.	MFS Mid Cap Value I	$15,001 - $50,000	Dividend	$50,001 - $100,000	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,000 or less
(2).	Sold (part)	Aug 16, 2024	$15,000 or less
(3).	Sold (part)	Nov 14, 2024	$15,001 - $50,000

3-Y. GMO Benchmark-Free Allocation I — $1,001 - $2,500 — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,000 or less
(2).	Buy (add'l)	Dec 23, 2024	$15,000 or less

3-Z. Thornburg Limited-Term Income Instl — $2,501 - $5,000 — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000

3-AA. SIT US Government Securities — $5,001 - $15,000 — Dividend — $100,001 - $250,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$100,001 - $250,000
(2).	Sold (part)	Feb 28, 2024	$15,000 or less
(3).	Sold (part)	Nov 5, 2024	$15,001 - $50,000
(4).	Buy (add'l)	Dec 23, 2024	$15,001 - $50,000

3-AB. Guggenheim Macro Opportunities Instl — $1,001 - $2,500 — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,000 or less

3-AC. Columbia Contrarian Core Fund Cl R4 — $15,001 - $50,000 — Dividend — $100,001 - $250,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Jul 1, 2024	$15,000 or less
(3).	Sold (part)	Dec 23, 2024	$15,000 or less

3-AD. Virtus Multi-Sector Short Term Bond Cl I — $5,001 - $15,000 — Dividend — $100,001 - $250,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Dec 23, 2024	$15,001 - $50,000

3-AE. Lord Abbett Short Duration Income Cl A — $2,501 - $5,000 — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold (part)	Dec 23, 2024	$15,001 - $50,000

3-AF. JPMorgan Advantage Fd Select Class — $15,001 - $50,000 — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold	Jun 4, 2024	$100,001 - $250,000

3-AG. FPA New Income — $2,501 - $5,000 — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,001 - $50,000

3-AH. Frost Total Return Bond Fund Instl — $5,001 - $15,000 — Dividend — $100,001 - $250,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,000 or less
(2).	Sold (part)	Dec 23, 2024	$15,001 - $50,000

3-AI. Brandywine Global Opportunities BD I — $2,501 - $5,000 — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000
(2).	Buy (add'l)	Jul 2, 2024	$15,000 or less

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
3-AJ.	Carillon Scout Mid Cap DMC MB	$15,001 - $50,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2024	$15,000 or less
(2).	Sold (part)	Jul 1, 2024	$15,000 or less
(3).	Sold (part)	Aug 16, 2024	$15,000 or less
(4).	Sold (part)	Nov 14, 2024	$15,001 - $50,000

3-AK. Appleseed Institutional — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000
(2).	Sold	Mar 19, 2024	$15,001 - $50,000

3-AL.	Pear Tree Polaris FGN VA SM CAP INSTL	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,001 - $50,000

4. **(H) Education Savings (529) Plan #10 (Closed in 2024)**

4-A. CLBRG SM CAP 529 PORT A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

4-B. DFA Intl Core Equity 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

4-C. Columbia Select LG Cap Grwth A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

4-D. Columbia Contrarion Core 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

4-E. AM Century Mid Cap Value 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

5. **(H) Education Savings (529) Plan #9 (Closed in 2024)**

5-A. CLBRG SM CAP 529 PORT A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

5-B. DFA Intl Core Equity 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

5-C. Columbia Select LG Cap Grwth A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

5-D. Columbia Contrarion Core 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

5-E. AM Century Mid Cap Value 529A — None

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

6. **(H) Education Savings (529) Plan #8 (Closed in 2024)**

6-A. CLBRG SM CAP 529 PORT A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

6-B. DFA Intl Core Equity 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

6-C. Columbia Select LG Cap Grwth A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

6-D. Columbia Contrarion Core 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

6-E. AM Century Mid Cap Value 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

7. **(H) Education Savings (529) Plan #7 (Closed in 2024)**

7-A. CLBRG SM CAP 529 PORT A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

7-B. DFA Intl Core Equity 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

7-C. Columbia Select LG Cap Grwth A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

7-D. Columbia Contrarion Core 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

7-E. AM Century Mid Cap Value 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

8. **(H) Education Savings (529) Plan #6 (Closed in 2024)**

8-A. CLBRG LGE CAP GWTH 529 PORT A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

8-B. CLBRG SM CAP 529 PORT A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

8-C. DFA Intl Core Equity 529A — None

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
8-D.	Columbia Select LG Cap Grwth A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,001 - $50,000				
8-E.	Columbia Contrarion Core 529A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,001 - $50,000				
8-F.	AM Century Mid Cap Value 529A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
9.	**(H) Education Savings (529) Plan #5 (Closed in 2024)**				
9-A.	CLBRG LGE CAP GWTH 529 PORT A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
9-B.	CLBRG SM CAP 529 PORT A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
9-C.	DFA Intl Core Equity 529A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
9-D.	Columbia Select LG Cap Grwth A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
9-E.	Columbia Contrarion Core 529A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
9-F.	AM Century Mid Cap Value 529A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
10.	**(H) Education Savings (529) Plan #4 (Closed in 2024)**				
10-A.	CLBRG LGE CAP GWTH 529 PORT A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
10-B.	CLBRG SM CAP 529 PORT A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
10-C.	DFA Intl Core Equity 529A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
10-D.	Columbia Select LG Cap Grwth A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
10-E.	Columbia Contrarion Core 529A		None		

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

10-F. AM Century Mid Cap Value 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

11. **(H) Education Savings (529) Plan #3 (Closed in 2024)**

11-A. CLBRG LGE CAP GWTH 529 PORT A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

11-B. CLBRG SM CAP 529 PORT A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

11-C. DFA Intl Core Equity 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

11-D. Columbia Select LG Cap Grwth A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

11-E. Columbia Contrarion Core 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,001 - $50,000

11-F. AM Century Mid Cap Value 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

12. **(H) Education Savings (529) Plan #2 (Closed in 2024)**

12-A. CLBRG LGE CAP GWTH 529 PORT A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

12-B. CLBRG SM CAP 529 PORT A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

12-C. DFA Intl Core Equity 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,000 or less

12-D. Columbia Select LG Cap Grwth A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,001 - $50,000

12-E. Columbia Contrarion Core 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,001 - $50,000

12-F. AM Century Mid Cap Value 529A — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 27, 2024	$15,001 - $50,000

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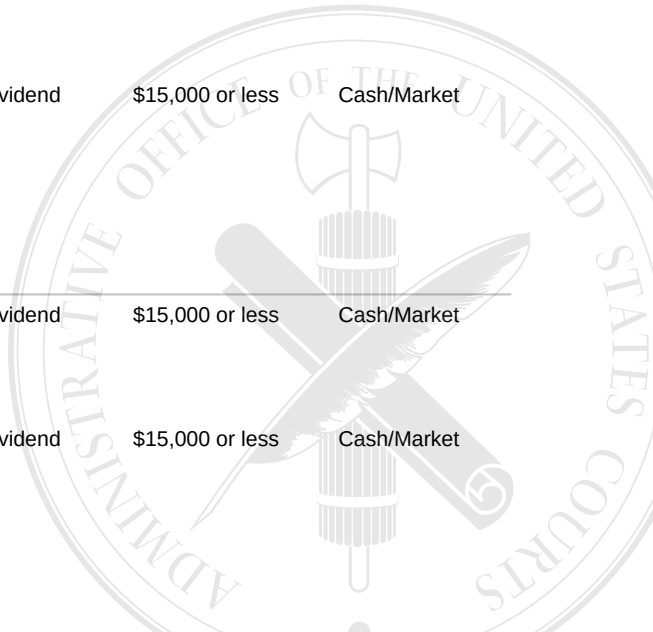
	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
13.	**(H) Education Savings (529) Plan #1 (Closed in 2024)**				
13-A.	CLBRG LGE CAP GWTH 529 PORT A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
13-B.	CLBRG SM CAP 529 PORT A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,000 or less				
13-C.	DFA Intl Core Equity 529A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,001 - $50,000				
13-D.	Columbia Select LG Cap Grwth A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,001 - $50,000				
13-E.	Columbia Contrarion Core 529A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,001 - $50,000				
13-F.	AM Century Mid Cap Value 529A		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 27, 2024 $15,001 - $50,000				
14.	**(H) Trust #2**				
14-A.	Fidelity Govt MMKT Capital Reserves	$2,501 - $5,000	Dividend	$15,000 or less	Cash/Market
15.	**(H) Education Savings (529) Plan #20 (Formally Plan #10)**				
15-A.	SMALLCAP World Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
15-B.	Fundamental Investors-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
15-C.	EuroPacific Growth Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
15-D.	Capital World Growth and Income-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
15-E.	New Perspective Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
16.	**(H) Education Savings (529) Plan #19 (Formally Plan #9)**				
16-A.	SMALLCAP World Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
16-B.	Fundamental Investors-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
16-C.	EuroPacific Growth Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
16-D.	Capital World Growth and Income-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
16-E.	New Perspective Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
17.	**(H) Education Savings (529) Plan #18 (Formally Plan #8)**				
17-A.	SMALLCAP World Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
17-B.	Fundamental Investors-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
17-C.	EuroPacific Growth Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
17-D.	Capital World Growth and Income-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
17-E.	New Perspective Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
18.	**(H) Education Savings (529) Plan #17 (Formally Plan #7)**				
18-A.	SMALLCAP World Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
18-B.	Fundamental Investors-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
18-C.	EuroPacific Growth Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
18-D.	Capital World Growth and Income-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
18-E.	New Perspective Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
19.	**(H) Education Savings (529) Plan #16 (Formally Plan #6)**				
19-A.	SMALLCAP World Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
19-B.	Fundamental Investors-529F2	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
19-C.	EuroPacific Growth Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
19-D.	Capital World Growth and Income-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
19-E.	American Balanced Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
20.	**(H) Education Savings (529) Plan #15 (Formally Plan #5)**				
20-A.	SMALLCAP World Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
20-B.	Fundamental Investors-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
20-C.	EuroPacific Growth Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
20-D.	Capital World Growth and Income-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
20-E.	New Perspective Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
21.	**(H) Education Savings (529) Plan #14 (Formally Plan #4)**				
21-A.	SMALLCAP World Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
21-B.	Fundamental Investors-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
21-C.	EuroPacific Growth Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
21-D.	Capital World Growth and Income-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
21-E.	New Perspective Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
22.	**(H) Education Savings (529) Plan #13 (Formally Plan #3)**				
22-A.	SMALLCAP World Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
22-B.	Fundamental Investors-529F2	$1,001 - $2,500	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
22-C.	EuroPacific Growth Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
22-D.	Capital World Growth and Income-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
22-E.	American Balanced Fund-529F2	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,000 or less				
23.	**(H) Education Savings (529) Plan #12 (Formally Plan #2)**				
23-A.	SMALLCAP World Fund-529F2	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,001 - $50,000				
23-B.	Fundamental Investors-529F2	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,001 - $50,000				
23-C.	EuroPacific Growth Fund-529F2	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,001 - $50,000				
23-D.	Capital World Growth and Income-529F2	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,001 - $50,000				
23-E.	American Balanced Fund-529F2	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,001 - $50,000				
24.	**(H) Education Savings (529) Plan #11 (Formally Plan #1)**				
24-A.	SMALLCAP World Fund-529F2	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,001 - $50,000				
24-B.	Fundamental Investors-529F2	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,001 - $50,000				
24-C.	EuroPacific Growth Fund-529F2	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,001 - $50,000				
24-D.	Capital World Growth and Income-529F2	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,001 - $50,000				
24-E.	American Balanced Fund-529F2	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 29, 2024 $15,001 - $50,000				
25.	**(H) HSA #1**				
25-A.	PNC Cash Account	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market

VIII. Additional Information or Explanations

	ADDITIONAL INFORMATION OR EXPLANATION
1.	Future Scholar 529 College Savings Plan Account (listed as Education Savings (529) Plan #1) was closed during 2024 and transferred to American Funds Account (listed as Education Savings (529) Plan #11). In future disclosures, Education Savings (529) Plan #1 will no longer be listed, as all investments and related activity has transferred to Education Savings (529) Plan #11.
2.	Future Scholar 529 College Savings Plan Account (listed as Education Savings (529) Plan #2) was closed during 2024 and transferred to American Funds Account (listed as Education Savings (529) Plan #12). In future disclosures, Education Savings (529) Plan #2 will no longer be listed, as all investments and related activity has transferred to Education Savings (529) Plan #12.
3.	Future Scholar 529 College Savings Plan Account (listed as Education Savings (529) Plan #3) was closed during 2024 and transferred to American Funds Account (listed as Education Savings (529) Plan #13). In future disclosures, Education Savings (529) Plan #3 will no longer be listed, as all investments and related activity has transferred to Education Savings (529) Plan #13.
4.	Future Scholar 529 College Savings Plan Account (listed as Education Savings (529) Plan #4) was closed during 2024 and transferred to American Funds Account (listed as Education Savings (529) Plan #14). In future disclosures, Education Savings (529) Plan #4 will no longer be listed, as all investments and related activity has transferred to Education Savings (529) Plan #14.
5.	Future Scholar 529 College Savings Plan Account (listed as Education Savings (529) Plan #5) was closed during 2024 and transferred to American Funds Account (listed as Education Savings (529) Plan #15). In future disclosures, Education Savings (529) Plan #5 will no longer be listed, as all investments and related activity has transferred to Education Savings (529) Plan #15.
6.	Future Scholar 529 College Savings Plan Account (listed as Education Savings (529) Plan #6) was closed during 2024 and transferred to American Funds Account (listed as Education Savings (529) Plan #16). In future disclosures, Education Savings (529) Plan #6 will no longer be listed, as all investments and related activity has transferred to Education Savings (529) Plan #16.
7.	Future Scholar 529 College Savings Plan Account (listed as Education Savings (529) Plan #7) was closed during 2024 and transferred to American Funds Account (listed as Education Savings (529) Plan #17). In future disclosures, Education Savings (529) Plan #7 will no longer be listed, as all investments and related activity has transferred to Education Savings (529) Plan #17.
8.	Future Scholar 529 College Savings Plan Account (listed as Education Savings (529) Plan #8) was closed during 2024 and transferred to American Funds Account (listed as Education Savings (529) Plan #18). In future disclosures, Education Savings (529) Plan #8 will no longer be listed, as all investments and related activity has transferred to Education Savings (529) Plan #18.
9.	Future Scholar 529 College Savings Plan Account (listed as Education Savings (529) Plan #9) was closed during 2024 and transferred to American Funds Account (listed as Education Savings (529) Plan #19). In future disclosures, Education Savings (529) Plan #9 will no longer be listed, as all investments and related activity has transferred to Education Savings (529) Plan #19.
10.	Future Scholar 529 College Savings Plan Account (listed as Education Savings (529) Plan #10) was closed during 2024 and transferred to American Funds Account (listed as Education Savings (529) Plan #20). In future disclosures, Education Savings (529) Plan #10 will no longer be listed, as all investments and related activity has transferred to Education Savings (529) Plan #20.