Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Hale, David Jason
U.S. District Court - Kentucky Western
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/ Hale, David Jason [electronically signed on Jul 7, 2026 3:23pm by Hale, David Jason in JEFS]
/s/ Hale, David Jason [electronically signed on May 13, 2026 3:06pm by Hale, David Jason in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Member, Advisory Board John G. Heyburn Initiative for Excellence in the Federal Judiciary	University/College	Board of Advisors
2.	Member, Louisville Bar Association	Other: Local bar association	Board of Directors

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.	Broadway Baptist Church - salary			$0.00	

IV. Reimbursements

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

V. Gifts

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

VI. Liabilities

	CREDITOR NAME	TYPE OF LIABILITY	VALUE
1.	American Express	Other: Credit card	$15,001 - $50,000

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**First Financial Bank**	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
2.	**Louisville Federal Credit Union**	$1,000 or less	Interest	$15,000 or less	Cash/Market
3.	**Eclipse Bank**	$1,000 or less	Interest	$15,000 or less	Cash/Market
4.	**(H) Investment Accounts (H)**				
5.	**Invesco QQQ TR ETF Unit Series 1**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 16, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 19, 2025	$15,000 or less

6.	**Blackrock Funds IShares S&P 500 Index Fd**	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
7.	**United Bankshares (UBSI)**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8.	**Wells Fargo Cash Accounts**	$1,000 or less	Interest	$15,000 or less	Cash/Market
9.	**Legg Mason Funds Clearbridge Dividend Strategy Fd Class**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 19, 2025	$15,000 or less

10.	**Virtus Funds KAR Small Cap Core Fund Class**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 17, 2025	$15,000 or less

11.	**(H) Retirement Accounts (H)**				
12.	**Blackrock Funds IShares S&P 500 Index Fd**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 10, 2025	$15,000 or less
(2).	Sold (part)	Oct 10, 2025	$15,000 or less
(3).	Buy (add'l)	Dec 17, 2025	$15,000 or less

13.	**Legg Mason Clearbridge Dividend Strategy Fd Class**	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Dec 22, 2025 $15,000 or less				
14.	**Legg Mason Clearbridge Appreciation Fd Class**	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 10, 2025 $15,000 or less				
	(2). Sold (part) Apr 11, 2025 $15,000 or less				
	(3). Buy (add'l) Dec 12, 2025 $15,000 or less				
15.	**Invesco QQQ TR ETF Unit Series 1**	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Feb 19, 2025 $15,000 or less				
16.	**Virtus Funds KAR Small Cap Core Fund Class**	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 10, 2025 $15,000 or less				
	(2). Buy (add'l) Dec 17, 2025 $15,000 or less				
17.	**First Trust Rising ETF Dividend Achievers**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
18.	**Vanguard Inst'l Target Retirement 2035 (VTTHX)**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
19.	**Vanguard Target Retirement 2035 Trust Plus (** [redacted]	$1,000 or less	Dividend	$15,000 or less	Cash/Market
20.	**Wells Fargo Cash Accounts**	$1,000 or less	Interest	$15,000 or less	Cash/Market

VIII. Additional Information or Explanations

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