Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Joseph, David Cleveland
U.S. District Court - Louisiana 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/ Joseph, David Cleveland [electronically signed on Jun 15, 2026 12:46pm by Joseph, David Cleveland in JEFS]
/s/ Joseph, David Cleveland [electronically signed on May 11, 2026 3:18pm by Joseph, David Cleveland in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Federal Bar Association, Lafayette/ Acadiana Chapter	Non-Profit	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.	Lafayette General Hospital	Breast Radiologist	No	$0.00	

IV. Reimbursements

	SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	LSU Law Center	Feb 7, 2025	Feb 7, 2025	LSU Law Center, Baton Rouge, LA	LSU Law Review Symposium speaker	mileage reimbursement
2.	International Association of Defense Counsel	Feb 12, 2025	Feb 14, 2025	Dana Point, CA	Panel Moderator	airfare, rental car, parking/tolls

V. Gifts

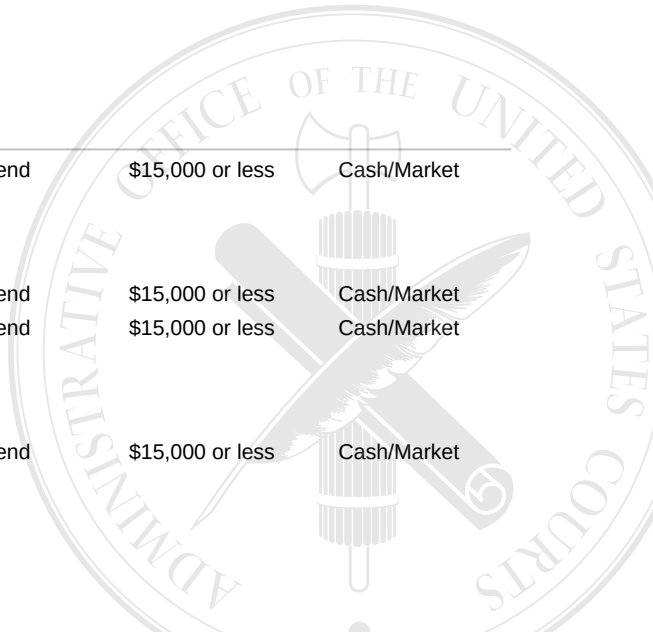
I do not have any Gifts to report
No entries in this section

VI. Liabilities

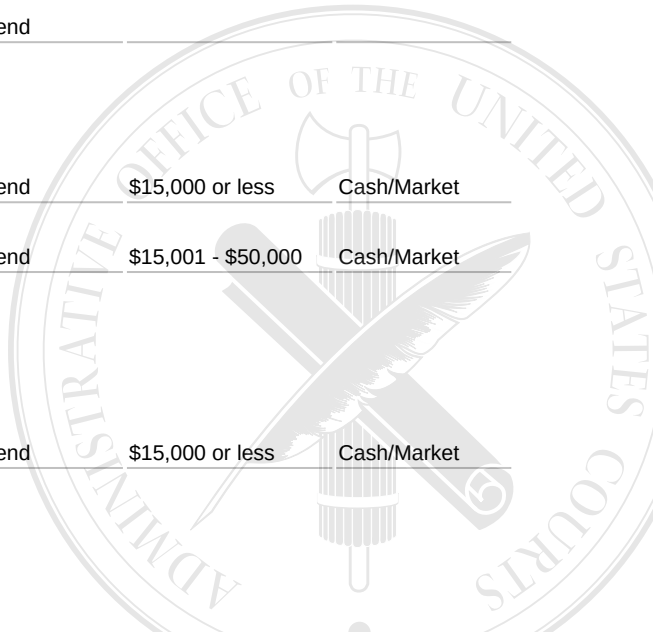
I do not have any Liabilities to report
No entries in this section

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**Louisiana START #1- Vanguard Large-Cap Idx**	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Apr 2, 2025 $15,000 or less				
2.	**Charles Schwab #2- DSTL**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 28, 2025 $15,000 or less				
3.	**Charles Schwab ROTH IRA - MDY**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4.	**Northwestern Mutual whole life policy**	$1,000 or less	Distribution	$15,000 or less	Cash/Market
5.	**Charles Schwab SEP IRA #1- GSST**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
6.	**Charles Schwab #2- CIVIX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Sep 2, 2025 $15,000 or less				
	(2). Buy (add'l) Aug 13, 2025 $15,000 or less				
	(3). Buy (add'l) Feb 3, 2025 $15,000 or less				
7.	**Charles Schwab #2- BIVIX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Feb 3, 2025 $15,000 or less				
8.	**(H) Charles Schwab**				
8-A.	Vanguard S&P 500 VOO	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 2, 2025 $15,000 or less				
8-B.	Wisdometree Emerging Markets DEM (X)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
8-C.	Ishares Short Duration NEAR	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 2, 2025 $15,000 or less				
8-D.	Ishares Core S&P Small Cap IJR	$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 Jan 2, 2025 $15,000 or less				
8-E.	Doubleline Core Fixed Income DBLFX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 2, 2025 $15,000 or less				
8-F.	Invesco Bulletshares 2026 BSCQ	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 2, 2025 $15,000 or less				
8-G.	Ishares Core MSCI EAFE IEFA	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 2, 2025 $15,000 or less				
8-H.	Global X MLP & Energy MLPX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 2, 2025 $15,000 or less				
8-I.	Coldman Sachs Ultra Short GSST	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 2, 2025 $15,000 or less				
8-J.	Vaneck Gold Miners ETF GDX (X)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
8-K.	Shares 0 to 3 Mnth SGOV		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jan 2, 2025 $15,001 - $50,000				
8-L.	Cash		None	$15,000 or less	Cash/Market
8-M.	Vanguard Energy ETF VDE	$5,001 - $15,000	Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jan 2, 2025 $15,001 - $50,000				
8-N.	State Street SPDR S&P Midcap 400 MDY	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 2, 2025 $15,000 or less				
8-O.	Distillate US Fundamental Stability & Value DSTL	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 2, 2025 $15,000 or less				
8-P.	Blackrock Strategic Income BSIIX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 2, 2025 $15,000 or less				
9.	**Louisiana START #2- Inst Total Stock Index**	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Apr 2, 2025 $15,000 or less				
10.	**Charles Schwab SEP IRA #1- BIL**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
11.	**Charles Schwab #2- ANGIX**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Aug 13, 2025 $15,000 or less				
	(2). Buy (add'l) Feb 3, 2025 $15,000 or less				
12.	**Charles Schwab ROTH IRA #2- BIL**	$1,000 or less	Dividend	$15,000 or less	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
13.	**Louisiana START #3- VG LS Conservative Growth (VSCGX)**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 23, 2025	$15,001 - $50,000

14.	**Charles Schwab SEP IRA #1- VOO**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
15.	**Charles Schwab SEP IRA #1- BSCQ**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
16.	**Charles Schwab #2- CEF**		None	$15,000 or less	Cash/Market

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

17.	**Charles Schwab SEP IRA #1- Cash**		None	$15,000 or less	Cash/Market
18.	**Charles Schwab #2- OIH**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

19.	**Louisiana START #1- Vanguard Small-Cap Idx (VMCIX)**	$1,000 or less	Dividend		

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

20.	**Charles Schwab #2- GDX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 3, 2025	$15,000 or less

21.	**Charles Schwab #2- DNSMX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 1, 2025	$15,000 or less
(2).	Buy (add'l)	Nov 12, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 2, 2025	$15,000 or less
(4).	Buy (add'l)	Aug 13, 2025	$15,000 or less
(5).	Buy (add'l)	Mar 3, 2025	$15,000 or less
(6).	Sold (part)	Feb 3, 2025	$15,000 or less
(7).	Buy (add'l)	Jan 28, 2025	$15,000 or less

22.	**Charles Schwab #2- VEIPX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Sep 2, 2025	$15,000 or less
(2).	Buy (add'l)	Aug 13, 2025	$15,000 or less
(3).	Buy (add'l)	Feb 3, 2025	$15,000 or less

23.	**Louisiana START #1-Vanguard Mid-Cap Idx (VLISX)**	$1,000 or less	Dividend		

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

24.	**White Farm Properties, LLC**		None	$100,001 - $250,000	Estimated

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
25.	**Louisiana START #1- Earnings Enhancements**	$1,000 or less	Interest	$15,000 or less	Cash/Market
26.	**Charles Schwab #2- VWIUX**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Nov 12, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Apr 2, 2025	$15,000 or less

27.	**Charles Schwab SEP IRA #1- CEF**		None	$15,000 or less	Cash/Market
28.	**Charles Schwab ROTH IRA #2- MDY**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
29.	**Charles Schwab ROTH IRA #2- BSIIX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
30.	**Charles Schwab SEP IRA #1- BSIIX**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
31.	**Charles Schwab ROTH IRA #2- Cash**		None	$15,000 or less	Cash/Market
32.	**Charles Schwab #2 - VWSUX**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Nov 12, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Apr 2, 2025	$15,000 or less
(3).	Buy (add'l)	Feb 3, 2025	$15,001 - $50,000

33.	**Vanguard Target Retirement 2035 Fund**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 23, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 22, 2025	$15,000 or less
(3).	Buy (add'l)	Jul 8, 2025	$15,000 or less
(4).	Buy (add'l)	Jun 25, 2025	$15,000 or less
(5).	Buy (add'l)	Jun 11, 2025	$15,000 or less
(6).	Buy (add'l)	May 27, 2025	$15,000 or less
(7).	Buy (add'l)	May 13, 2025	$15,000 or less
(8).	Buy (add'l)	Apr 29, 2025	$15,000 or less
(9).	Buy (add'l)	Apr 16, 2025	$15,000 or less
(10).	Buy (add'l)	Apr 1, 2025	$15,000 or less
(11).	Buy (add'l)	Mar 18, 2025	$15,000 or less
(12).	Buy (add'l)	Mar 5, 2025	$15,000 or less
(13).	Buy (add'l)	Feb 18, 2025	$15,000 or less
(14).	Buy (add'l)	Feb 5, 2025	$15,000 or less
(15).	Buy (add'l)	Jan 22, 2025	$15,000 or less
(16).	Buy (add'l)	Jan 8, 2025	$15,000 or less

34.	**Charles Schwab ROTH IRA - IJR**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
35.	**Louisiana START #2- Total International Stk**	$1,000 or less	Dividend		

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

36.	**Charles Schwab ROTH IRA #2- DSTL**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
37.	**Charles Schwab ROTH IRA #2- DBLFX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
38.	**Charles Schwab ROTH IRA #2- GDXJ (X)**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
39.	**Charles Schwab SEP IRA #1- IEFA**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
40.	**Charles Schwab ROTH IRA #2- VOO**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
41.	**Louisiana START #2- VG LS Conservative Growth (VSCGX)**	$2,501 - $5,000	Dividend,Interest	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 8, 2025	$50,001 - $100,000
(2).	Sold	Apr 8, 2025	$50,001 - $100,000
(3).	Buy	Apr 2, 2025	$50,001 - $100,000

42.	**Charles Schwab ROTH IRA - NEAR**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
43.	**Charles Schwab #2- SNOXX**	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 9, 2025	$100,001 - $250,000
(2).	Sold (part)	Sep 30, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 2, 2025	$15,000 or less
(4).	Buy	Aug 13, 2025	$15,000 or less

44.	**Charles Schwab ROTH IRA #2- IEFA**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
45.	**Louisiana START #1- Age-Based Moderate Track Fund**		None		

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

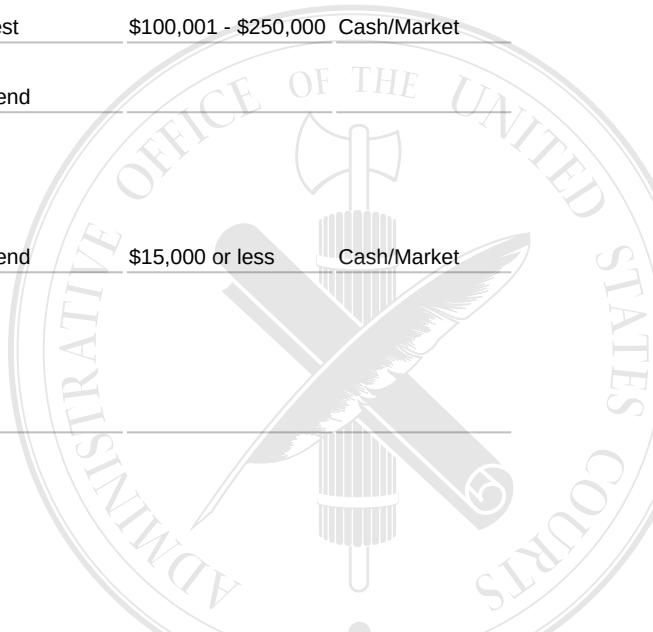
46.	**Charles Schwab SEP IRA #1- IJR**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
47.	**Charles Schwab ROTH IRA - DSTL**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
48.	**USAA savings account cash equivalent- USAA #4**		None	$15,000 or less	Cash/Market
49.	**USAA Checking Account #5**	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
50.	**Charles Schwab ROTH IRA #2- NEAR**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
51.	**American Express National Bank**	$5,001 - $15,000	Interest	$100,001 - $250,000	Cash/Market
52.	**Louisiana START #2- Vaguard Total World**	$1,000 or less	Dividend		

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

53.	**Charles Schwab #2- PVCIX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 3, 2025	$15,000 or less

54.	**Louisiana START #3- LS Moderate Growth**		None		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jun 23, 2025 $15,001 - $50,000				
55.	**Charles Schwab SEP IRA #1- SNOXX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 13, 2025 $15,000 or less				
56.	**Charles Schwab ROTH IRA - BSIIX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
57.	**Charles Schwab #2- VEA**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Dec 1, 2025 $15,000 or less				
	(2). Buy (add'l) Feb 3, 2025 $15,000 or less				
58.	**Charles Schwab SEP IRA #1- GDXJ**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
59.	**Louisiana START #1- Vanguard Total World**	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Apr 2, 2025 $15,000 or less				
60.	**Charles Schwab ROTH IRA #2- GDX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
61.	**Charles Schwab #2- BSCQ**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Feb 3, 2025 $15,000 or less				
62.	**Louisiana START #1- Total International Stk**	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Apr 2, 2025 $15,000 or less				
63.	**Charles Schwab ROTH IRA #2- UTES**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
64.	**Louisiana START #2- Vanguard Large-Cap Idx**	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Apr 2, 2025 $15,000 or less				
65.	**Charles Schwab SEP IRA #1- NEAR**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
66.	**Charles Schwab SEP IRA #1- MLPX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
67.	**(H) Vanguard 401k**				
67-A.	---JP Morgan Small Cap ValueR6	$1,000 or less	Dividend,Interest	$15,000 or less	Cash/Market
67-B.	---AC US SmallCap Growth F		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Sep 30, 2025 $15,000 or less				
67-C.	---ClearBridge Sm C Grwth R2		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Sep 30, 2025 $15,000 or less				
67-D.	----TRP Blue Chip Growth I CI	$1,001 - $2,500	Gain		

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Sep 30, 2025 $15,001 - $50,000				
	(2). Buy (add'l) Jun 30, 2025 $15,000 or less				
	(3). Buy (add'l) Mar 31, 2025 $15,000 or less				
67-E.	---Vanguard Target Retire 2045 Tr		None	$15,000 or less	Cash/Market
67-F.	---TRP Blue Chip Growth T2		None	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Sep 30, 2025 $15,001 - $50,000				
67-G.	---AS Sp Mdcp VI CIT E1		None	$15,000 or less	Cash/Market
67-H.	----PIMCO Total Return Inst	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Sep 30, 2025 $15,001 - $50,000				
	(2). Buy (add'l) Sep 30, 2025 $15,000 or less				
	(3). Buy (add'l) Jun 30, 2025 $15,000 or less				
	(4). Buy (add'l) Mar 31, 2025 $15,000 or less				
67-I.	----AmerFundsEuroPacificGrR6	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Sep 30, 2025 $15,000 or less				
	(2). Buy (add'l) Jun 30, 2025 $15,000 or less				
	(3). Buy (add'l) Mar 31, 2025 $15,000 or less				
67-J.	---Dodge & Cox Stock Fund X	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jun 30, 2025 $15,000 or less				
	(2). Buy (add'l) Mar 31, 2025 $15,000 or less				
67-K.	----Vanguard Federal Money Mkt Fund	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Sep 30, 2025 $15,000 or less				
	(2). Buy (add'l) Jun 30, 2025 $15,000 or less				
	(3). Buy (add'l) Mar 31, 2025 $15,000 or less				
67-L.	---PIMCO Ttl Rtrn Trust I		None	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Sep 30, 2025 $15,001 - $50,000				
68.	**Charles Schwab #2- FPACX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Aug 13, 2025 $15,000 or less				
	(2). Buy (add'l) Apr 2, 2025 $15,000 or less				
	(3). Buy (add'l) Feb 3, 2025 $15,000 or less				
69.	**Charles Schwab #2- VOO**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Sep 2, 2025 $15,000 or less				
	(2). Buy (add'l) Apr 2, 2025 $15,000 or less				
70.	**Charles Schwab SEP IRA #1- UTES**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
71.	**Charles Schwab #2- DIEMX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Sep 2, 2025	$15,000 or less
(2).	Buy (add'l)	Aug 13, 2025	$15,000 or less
(3).	Buy (add'l)	Feb 3, 2025	$15,000 or less

72.	**Charles Schwab SEP IRA #1- GDX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
73.	**Charles Schwab #2- UTES**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

74.	**Charles Schwab #2- GDXJ**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
75.	**Louisiana START #2 - Earning Enhancements**		None	$15,000 or less	Cash/Market
76.	**Charles Schwab #2- Cash**		None	$15,001 - $50,000	Cash/Market
77.	**Infinity AIT Fund LLC**	$1,001 - $2,500	Dividend,Interest	$100,001 - $250,000	Book Value

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 30, 2025	$50,001 - $100,000

78.	**Charles Schwab ROTH IRA #2- BSCQ**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
79.	**Charles Schwab #2- RMLPX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

80.	**Louisiana START 529 Louisiana Principal Protection Fund #1**	$1,001 - $2,500	Interest	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 20, 2025	$15,000 or less
(2).	Buy (add'l)	Nov 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 20, 2025	$15,000 or less
(4).	Buy (add'l)	Aug 20, 2025	$15,000 or less
(5).	Buy (add'l)	Jul 20, 2025	$15,000 or less
(6).	Buy (add'l)	Jun 20, 2025	$15,000 or less
(7).	Buy (add'l)	May 20, 2025	$15,000 or less
(8).	Buy	Apr 2, 2025	$50,001 - $100,000
(9).	Sold	Apr 2, 2025	$50,001 - $100,000

81.	**Disney Stock**		None	$15,000 or less	Cash/Market
82.	**Louisiana START 529 Louisiana Principal Protection Fund #2**		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Apr 2, 2025	$15,001 - $50,000

83.	**Charles Schwab ROTH IRA #2- MLPX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
84.	**Charles Schwab #2- DBLSX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Aug 13, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 3, 2025	$15,000 or less

85.	**Charles Schwab ROTH IRA - DBLFX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
86.	**Charles Schwab SEP IRA #1- MDY**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
87.	**Charles Schwab ROTH IRA #2- CEF (X)**		None	$15,000 or less	Cash/Market
88.	**Charles Schwab #2- ARSIX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

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

89.	**Charles Schwab ROTH IRA - BSCQ**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
90.	**Louisiana START #1- Inst Total Stock Index**	$1,000 or less	Dividend		

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

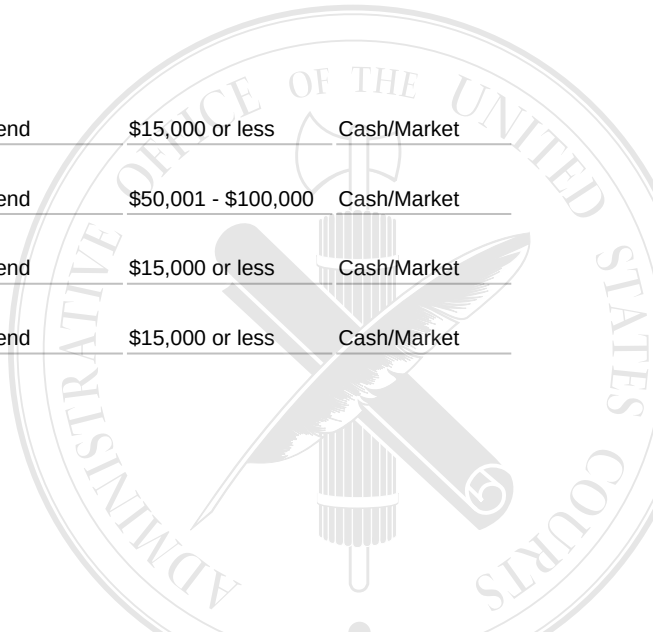
91.	**Charles Schwab ROTH IRA #2- DEM**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
92.	**Charles Schwab ROTH IRA #2- GSST**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
93.	**Charles Schwab ROTH IRA - VOO**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
94.	**Charles Schwab ROTH IRA #2- IJR**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
95.	**Charles Schwab #2- GSIMX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Aug 13, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 3, 2025	$15,000 or less

96.	**Charles Schwab SEP IRA #1- DBLFX**	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
97.	**USAA Checking Account #6**		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Closed	Feb 14, 2025	$15,000 or less

98.	**Charles Schwab SEP IRA #1- OIH**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
99.	**Charles Schwab SEP IRA #1- DSTL**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
100.	**Charles Schwab SEP IRA #1- DEM**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
101.	**Charles Schwab ROTH IRA - IEFA**	$1,000 or less	Dividend	$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