Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Kiel, Edward S.
U.S. District Court - New Jersey
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/ Kiel, Edward S. [electronically signed on Sep 28, 2026 3:09pm by Kiel, Edward S. in JEFS]
/s/ Kiel, Edward S. [electronically signed on Sep 2, 2026 11:03am by Kiel, Edward S. 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.	Advanced Eye Care Center	Salary	No	$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

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

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**(H) INDIVIDUAL ASSETS**				
1-A.	CHASE BANK (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
1-B.	BANK OF AMERICA (cash)		None	$15,000 or less	Cash/Market
1-C.	METLIFE PERMANENT (WHOLE) LIFE INSURANCE POLICY	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
1-D.	NORTHWESTERN MUTUAL (WHOLE) LIFE INSURANCE POLICY	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
1-E.	NEW YORK LIFE CUSTOM WHOLE LIFE INSURANCE POLICY	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
1-F.	INSPERIA FINANCIAL HSA (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
1-G.	CAPITAL ONE SAVINGS (cash)	$1,000 or less	Interest	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Opened	Nov 23, 2025	$15,000 or less

2.	**(H) ACCOUNT #1**				
2-A.	JPMORGAN DEPOSIT ACCOUNT (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
2-B.	FIDELITY SALEM STR TR FIDELITY 500 (FXAIX)	$15,001 - $50,000	Dividend,Gain	$500,001 - $1,000,000	Cash/Market

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

2-C.	FIDELITY SALEM STR TR INTL INDEX (FSPSX)	$5,001 - $15,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold (part)	Jun 9, 2025	$15,000 or less

2-D.	ISHARES MSCI JAPAN ETF EST (EWJ)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-E.	ISHARES MSCI CANADA ETF (EWC)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-F.	ISHRES MSCI PACIFIC EX JAPAN ETF (EPP)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-G.	ISHARES CORE MSCI PACIFIC ETF (IPAC)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-H.	VANGUARD INTL EQUITY (VGK)	$5,001 - $15,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jun 9, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Oct 20, 2025	$15,001 - $50,000

2-I.	BLACKROCK FUNDS V HIGH YIELD BOND PORTFOLIO (BRHYX)	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market

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

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
2-J.	ISHARES TRUST US TREASURY BOND (GOVT)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Oct 20, 2025	$15,001 - $50,000

2-K.	PGIM HIGH YIELD FUND (PHYQX)	$1,001 - $2,500	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 20, 2025	$15,000 or less

2-L.	VANGUARD BOND INDEX FD (VBTLX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-M.	VANGUARD EMERGING MARKETS GOV BOND ETF (VWOB)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-N.	VANGUARD INTERMEDIATE TERM CORP BOND ETF (VCIT)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

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

2-O.	VANGUARD SCOTTSDALE MORTGAGE BACKED SECURITIES ETF (VMBS)	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market

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

2-P.	VANGUARD TOTAL BOND MARKET ETF (BND)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Buy (add'l)	Jun 9, 2025	$15,001 - $50,000

2-Q.	VANGUARD TOTAL INTL BOND (BNDX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Buy (add'l)	Jun 9, 2025	$15,000 or less

3.	**(H) ACCOUNT #2**				
3-A.	FIDELITY GOVERNMENT MONEY MARKET (SPAXX) (cash eq.)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jun 20, 2025	$15,000 or less
(2).	Sold (part)	Jul 1, 2025	$15,000 or less
(3).	Buy (add'l)	Jul 3, 2025	$15,000 or less
(4).	Buy (add'l)	Oct 8, 2025	$15,000 or less

3-B.	CONSTELLATION ENERGY CORP COM (CEG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-C.	EATON CORPORATION PLC (ETN)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 28, 2025	$15,000 or less

3-D.	INTERACTIVE BROKERS GROUP INC (IBKR)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 28, 2025	$15,000 or less

3-E.	SALESFORCE INC COM (CRM)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

3-F.	AMPLIFY ETF TR BLOCKCHAIN LDR (BLOK)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-G.	FIRST TR EXCHANGE TRADED FD DOW JONES (FDN)		None	$15,000 or less	Cash/Market

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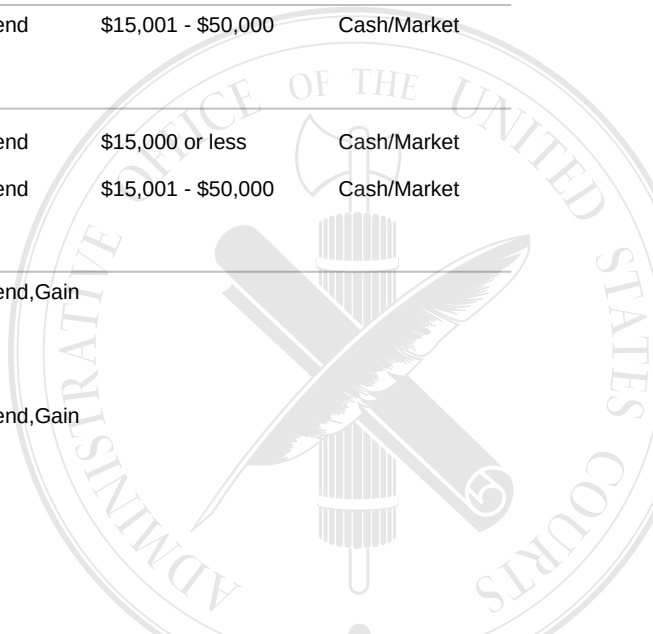
	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
3-H.	FIRST TR EXCHANGE TRADED FD II NASDQ CLN (GRID)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Mar 28, 2025 $15,000 or less				
3-I.	FIRST TRUST WATER ETF (FIW)	$1,000 or less	Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jan 24, 2025 $15,000 or less				
3-J.	GLOBAL X FDS US INFR ETF (PAVE)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Mar 28, 2025 $15,000 or less				
3-K.	ISHARES CORE S&P 500 ETF (IVV)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Aug 18, 2025 $15,000 or less				
3-L.	ISHARES TR US INSURANCE ETF (IAK)	$1,000 or less	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jul 3, 2025 $15,000 or less				
3-M.	ISHARES TRUST ISHARES MSCI INDIA ETF USD (INDA)	$1,000 or less	Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 11, 2025 $15,000 or less				
3-N.	ISHARES TRUST DUS FINANCIAL (IYF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jul 1, 2025 $15,000 or less				
3-O.	SPDR SER TR S&P METALS MNG (XME)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-P.	VANGUARD MID-CAP INDEX FUND (VO)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-Q.	VANGUARD WHITEHALL FDS HIGH DIV YLD (VYM)	$1,001 - $2,500	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Aug 18, 2025 $15,000 or less				
	(2). Sold Oct 8, 2025 $15,000 or less				
3-R.	VANGUARD WORLD FD INF TECH ETF (VGT)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-S.	ISHARES CORE US AGGREGATE BOND ETF (AGG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-T.	ISHARES SILVER TR ISHARES (SLV)		None	$15,000 or less	Cash/Market
3-U.	SPDR GOLD TR GOLD SHS (GLD)		None	$15,000 or less	Cash/Market
4.	**(H) ACCOUNT #3**				
4-A.	SCHWAB S&P 500 INDEX FUND (SWPPX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
5.	**(H) ACCOUNT #4**				
5-A.	AMERICAN FUNDS BALANCED FUND (ABALX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-B.	SCHWAB S&P 500 INDEX FUND (SWPPX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
6.	**(H) ACCOUNT #5**				
6-A.	SCHWAB S&P 500 INDEX (SWPPX)	$15,001 - $50,000	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 12, 2025 $50,001 - $100,000				
6-B.	VANGUARD EQUITY INCOME (VEIPX)	$100,001 - $1,000,000	Dividend,Gain		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 12, 2025 $500,001 - $1,000,000				
6-C.	VANGUARD GROWTH INDEX FD (VIGAX)	$50,001 - $100,000	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 12, 2025 $100,001 - $250,000				
6-D.	VANGUARD TARGET (VTTVX)	$15,001 - $50,000	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 12, 2025 $100,001 - $250,000				
6-E.	JPMORGAN IRA DEPOSIT (cash)		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Opened Dec 10, 2025 $15,000 or less				
6-F.	FIDELITY SALEM STR TR FIDELITY 500 (FXAIX)	$1,001 - $2,500	Dividend	$250,001 - $500,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $250,001 - $500,000				
6-G.	FIDELITY SALEM STR TR INTL INDEX (FSPSX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $15,001 - $50,000				
6-H.	JP MORGAN EXCHANGE TR FD TR BETABUILDERS CDA ETF (BBCA)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $15,001 - $50,000				
6-I.	JP MORGAN EXCHANGE TR FD TR BETABUILDERS DEVELOPED ASIA (BBAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $15,000 or less				
6-J.	JP MORGAN EXCHANGE TR FD TR BETABUILDERS EUROPE ETF (BBEU)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $15,001 - $50,000				
6-K.	JP MORGAN EXCHANGE TR FD TR BETABUILDERS JAPAN (BBJP)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $15,001 - $50,000				
6-L.	SIX CIRCLES TR INTL UNCONSTRAINED EQUITY (CIUEX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $50,001 - $100,000				
6-M.	SIX CIRCLES TR US UNCONSTRAINED EQUITY FD (CUSUX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $100,001 - $250,000				
6-N.	ISHARES TRUST US TREASURY BOND (GOVT)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $15,001 - $50,000				
6-O.	SIX CIRCLES TR GLOBAL BD FD (CGLBX)	$1,000 or less	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 Dec 10, 2025 $50,001 - $100,000				
6-P.	SIX CIRCLES TRUST CREDIT OPPORTUNITIES FUND (CRDOX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $15,001 - $50,000				
6-Q.	VANGUARD INTERMEDIATE (VCIT)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $15,001 - $50,000				
6-R.	VANGUARD SCOTTSDALE MORTGAGE BACKED SECURITIES ETF (VMBS)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $15,000 or less				
6-S.	VANGUARD TOTAL BOND MARKET ETF (BND)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $15,000 or less				
6-T.	VANGUARD TOTAL INTL BOND (BNDX)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 10, 2025 $50,001 - $100,000				
7.	**(H) ACCOUNT #6**				
7-A.	CHARLES SCHWAB BANK DEPOSIT ACCOUNT (cash)	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
7-B.	GABELLI SMALL CAP GROWTH (GABSX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
7-C.	SCHWAB S&P 500 INDEX FD (SWPPX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8.	**(H) ACCOUNT #7**				
8-A.	FIDELITY GOVERNMENT MONEY MARKET (SPAXX) (cash eq.)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Oct 2, 2025 $15,000 or less				
8-B.	DFA INTERNATIONAL SMALL COMPANY PORTFOLIO (DFISX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-C.	DIMENSIONAL EMERGING MARKETS VALUE (DFEVX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
8-D.	DIMENSIONAL ETF TRUST INTERNATNAL VAL (DFIV)	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Oct 2, 2025 $15,000 or less				
8-E.	DIMENSIONAL ETF TRUST US EQUITY (DFUS)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
8-F.	DIMENSIONAL ETF TRUST US SMALL CAP ETF (DFAS)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-G.	EA SERIES TRUST EA BRIDGEWAY OMN (BSVO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-H.	DIMENSIONAL ETF TRUST SHORT DURATION F (DFSD)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-I.	VANGUARD SCOTTSDALE FDS INTER TERM TREAS (VGIT)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Oct 2, 2025 $15,000 or less				
8-J.	VANGUARD SHT-TERM INFLATION-PROTECTED (VTIP)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
9.	**(H) ACCOUNT #8**				
9-A.	FIDELITY GOVERNMENT MONEY MARKET (cash eq.) (SPAXX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jun 20, 2025	$15,000 or less
(2).	Sold (part)	Jul 1, 2025	$15,000 or less
(3).	Buy (add'l)	Jul 2, 2025	$15,000 or less
(4).	Sold (part)	Nov 21, 2025	$15,000 or less

9-B.	CONSTELLATION ENERGY CORP COM (CEG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
9-C.	EATON CORPORATION PLC (ETN)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 28, 2025	$15,000 or less

9-D.	INTERACTIVE BROKERS GROUP INC COM (IBKR)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 28, 2025	$15,000 or less

9-E.	RIGETTI COMPUTING INC COMMON STOCK (RGTI)		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Nov 21, 2025	$15,000 or less

9-F.	SALESFORCE INC COM (CRM)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

9-G.	AMPLIFY ETF TR BLOCKCHAIN LDR (BLOK)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 12, 2025	$15,000 or less
(2).	Buy (add'l)	Oct 30, 2025	$15,000 or less

9-H.	EXCHANGE TRADED CONCEPTS TR ROBO GLOBAL (ROBO)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 12, 2025	$15,000 or less

9-I.	FIRST TR EXCHANGE TRADED FUND DOW JONES (FDN)		None	$15,000 or less	Cash/Market
9-J.	FIRST TR EXCHANGE TRADED FD II NASDQ CLN (GRID)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Sold (part)	Mar 28, 2025	$15,000 or less
(3).	Buy (add'l)	Aug 12, 2025	$15,000 or less

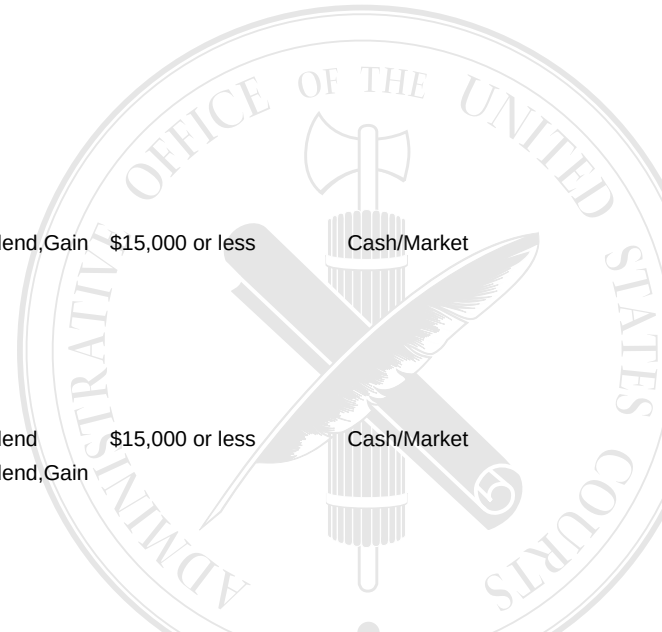
9-K.	FIRST TRUST WATER ETF (FIW)	$1,000 or less	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jan 24, 2025	$15,000 or less

9-L.	GLOBAL X FDS US INFR DEV ETF (PAVE)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Sold (part)	Mar 28, 2025	$15,000 or less
(3).	Buy (add'l)	Aug 12, 2025	$15,000 or less

9-M.	ISHARES TR NASDAQ BIOTECH (IBB)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
9-N.	ISHARES TR U.S. INSRNCE ETF (IAK)	$1,000 or less	Dividend,Gain		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jul 2, 2025 $15,000 or less				
9-O.	ISHARES TRUST DJ US FINANCIAL (IYF)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jul 1, 2025 $15,000 or less				
9-P.	ISHARES TRUST ISHARES MSCI INDIA ETF USD (INDA)	$1,001 - $2,500	Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 12, 2025 $15,000 or less				
9-Q.	SPDR S&P500 ETF TRUST TRUST UNIT (SPY)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
9-R.	VANGUARD MID-CAP INDEX FUND (VO)	$1,000 or less	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Oct 30, 2025 $15,000 or less				
9-S.	VANGUARD WHITEHALL FDS HIG (VYM)	$1,000 or less	DIVIDEND	$15,001 - $50,000	Cash/Market
9-T.	VANGUARD WORLD FD INF TECH ETF (VGT)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
9-U.	ISHARES CORE US AGGREGATE BOND ETF (AGG)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
9-V.	ISHARES SILVER TR ISHARES (SLV)		None	$15,001 - $50,000	Cash/Market
9-W.	SPDR GOLD TR GOLD SHS (GLD)		None	$15,001 - $50,000	Cash/Market
10.	**(H) ACCOUNT #9**				
10-A.	JPMORGAN DEPOSIT ACCOUNT (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Opened Feb 7, 2025 $15,000 or less				
10-B.	FIDELITY SALEM STR TR FIDELITY 500 (FXAIX)	$1,000 or less	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Feb 10, 2025 $15,000 or less				
	(2). Sold (part) Jun 9, 2025 $15,000 or less				
	(3). Sold Oct 23, 2025 $15,000 or less				
10-C.	FIDELITY SALEM STR TR INTL INDEX (FSPSX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Feb 10, 2025 $15,000 or less				
10-D.	JP MORGAN EXCHANGE TR FD TR BETABUILDERS CDA ETF (BBCA)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Feb 10, 2025 $15,000 or less				
10-E.	JP MORGAN EXCHANGE TR FD TR BETABUILDERS DEVELOPED ASIA (BBAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Feb 10, 2025 $15,000 or less				
10-F.	JP MORGAN EXCHANGE TR FD TR BEATBUILDERS EUROPE (BBEU)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Oct 23, 2025 $15,000 or less				
10-G.	JP MORGAN EXCHANGE TR FD TR BETABUILDERS JAPAN (BBJP)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Feb 10, 2025 $15,000 or less				

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
10-H.	SIX CIRCLES TR INTL UNCONSTRAINED EQUITY (CIUEX)	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 10, 2025	$15,001 - $50,000
(2).	Sold (part)	Jun 9, 2025	$15,000 or less

10-I.	SIX CIRCLES TR US UNCONSTRAINED EQUITY FD (CUSUX)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 10, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Oct 23, 2025	$15,000 or less

10-J.	VANGUARD INDEX TR 500 INDEX FD (VFIAX)	$2,501 - $5,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 23, 2025	$15,000 or less

10-K.	ISHARES TRUST US TREASURY BOND ETF (GOVT)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Oct 23, 2025	$15,000 or less

10-L.	LORD ABBETT INVT TR SHORT DURATION INCOME FD CL (LOLDX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 10, 2025	$15,000 or less

10-M.	SIX CIRCLES TR GLOBAL BD FD (CGLBX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 10, 2025	$15,001 - $50,000

10-N.	SIX CIRCLES TRUST CREDIT OPPORTUNITIES FUND (CRDOX)	$1,001 - $2,500	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 10, 2025	$15,001 - $50,000
(2).	Sold (part)	Oct 23, 2025	$15,000 or less

10-O.	VANGUARD INTERMEDIATE (VCIT)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 7, 2025	$15,000 or less
(2).	Sold (part)	Sep 11, 2025	$15,000 or less

10-P.	VANGUARD SCOTTSDALE MORTGAGE BACKED SECURITIES ETF (VMBS)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

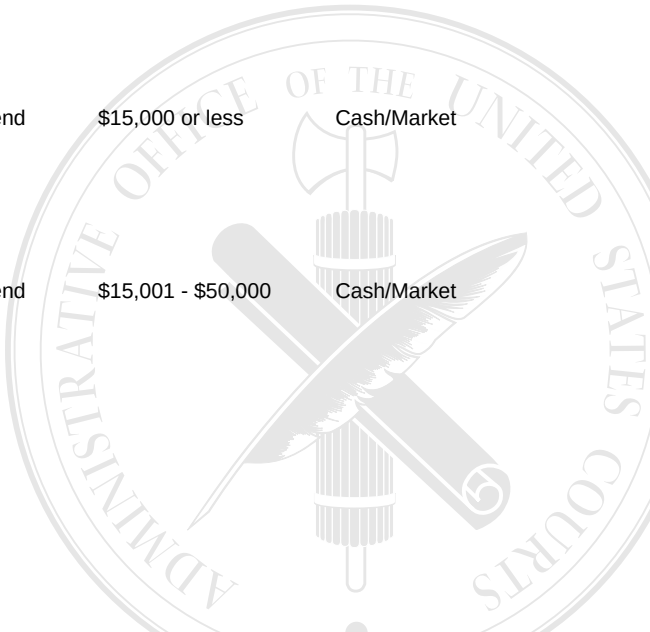
Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 7, 2025	$15,000 or less
(2).	Buy	Feb 10, 2025	$15,000 or less
(3).	Sold (part)	Oct 23, 2025	$15,000 or less

10-Q.	VANGUARD TOTAL BOND MARKET ETF (BND)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 7, 2025	$15,001 - $50,000
(2).	Buy	Apr 8, 2025	$15,000 or less

10-R.	VANGUARD TOTAL INTL BOND (BNDX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 7, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Jun 9, 2025	$15,000 or less
(3).	Buy (add'l)	Oct 23, 2025	$15,000 or less



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
10-S.	BLACKSTONE ALTERNTV INVT FDS ALTRNTV MULTI STRTGY FD (BXMYX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 10, 2025	$15,000 or less

10-T.	NEUBERGER BERMAN ALTERNATIVE FDS LONG SHORT FD (NLSIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 10, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 11, 2025	$15,000 or less

10-U.	PIMCO MORTGAGE OPPORTUNITIES AND BOND FUND (PMZIX)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 10, 2025	$15,000 or less
(2).	Sold (part)	Sep 11, 2025	$15,000 or less

10-V.	SIX CIRCLES TR MULTI STRATEGY FD DIV & CAP GAIN REINVEST (CALTX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 10, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 11, 2025	$15,000 or less

10-W.	ISHARES MSCI JAPAN ETF (EWJ)	$1,001 - $2,500	Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 7, 2025	$15,000 or less

10-X.	iSHARES MSCI CANADA ETF (EWC)	$1,001 - $2,500	Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 7, 2025	$15,000 or less

10-Y.	ISHARES MSCI PACIFIC EX JAPAN ETF (EPP)		None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 7, 2025	$15,000 or less

10-Z.	ISHARES TRUST MBS ETF (MBB)		None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 7, 2025	$15,000 or less

10-AA.	PGIM HIGH YIELD FUND (PHYQX)	$1,000 or less	Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 7, 2025	$15,001 - $50,000

10-AB.	VANGUARD EMERGING MARKETS GOV BOND ETF (VWOB)		None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 7, 2025	$15,000 or less

10-AC.	VANGUARD INTL EQUITY (VGK)	$1,000 or less	Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 7, 2025	$15,001 - $50,000

VIII. Additional Information or Explanations

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

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