AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 13101-13111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Leibowitz, David S.	U.S. District Court, Southern District of Florida	08/29/2025
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
U.S. District Judge (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
299 E. Broward Blvd. Fort Lauderdale, FL 33301		

IMPORTANT NOTES: ***The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.***

I. POSITIONS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☐ NONE *(No reportable positions.)*

POSITION	NAME OF ORGANIZATION/ENTITY
1. Trustee	Trust #1 (reportable assets are listed in Part VII)
2. Trustee	Trust #2 (reportable assets are listed in Part VII)
3. Trustee	Trust #3 (reportable assets are listed in Part VII)
4. Trustee	Trust #4 (reportable assets are listed in Part VII)
5. Trustee	Trust #5 (no reportable assets)
6. Trustee	Trust #6 (no reportable assets)
7. Trustee	Trust #7 (no reportable assets)
8. Trustee	Trust #8 (reportable assets are listed in Part VII)
9. Trustee	Trust #9 (reportable assets are listed in Part VII)
10. Trustee	Trust #10 (reportable assets are listed in Part VII)
11. Trustee	Trust #11 (reportable assets are listed in Part VII)
12. Trustee	Trust #12 (reportable assets are listed in Part VII)
13. Trustee	Trust #13 (reportable assets are listed in Part VII)
14. Trustee	Trust #14 (reportable assets are listed in Part VII)
15. Trustee	Trust #15 (reportable assets are listed in Part VII)
16. Trustee	Trust #16 (reportable assets are listed in Part VII)

17. Trustee	Trust #17 (reportable assets are listed in Part VII)
18. Trustee	Trust #18 (reportable assets are listed in Part VII)
19. Trustee	Trust #19 (reportable assets are listed in Part VII)
20. Director	Foundation #1
21. Director	Foundation #2
22. Director	[redacted]
23. Manager	[redacted]
24. Trustee	Greater Miami Jewish Federation
25. Trustee	Miami Beach Holocaust Memorial
26. Member-Manager	80 North Lake, LLC
27. Member-Manager	15700 RBH, LLC
28. Member	3150 GMD, LLC
29. Member	597 Buttonwood, LLC

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements.)*

☐ NONE *(No reportable agreements.)*

DATE	PARTIES AND TERMS
1. 2012	[redacted] 401(k) Plan. Employee discretion to select mutual funds within fund lineup provided by Plan Sponsor (reportable assets are listed in Part VII)
2.	
3.	

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE
1.	2024	Magellan Healthcare, Inc.
2.		
3.		
4.		

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

Name of Person Reporting	Date of Report
Leibowitz, David S.	08/29/2025

V. GIFTS. *(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☐ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.	Trust #2	Mortgage Note	N
2.	Trust #2	Mortgage Note	J
3.	Trust #20	Mortgage Note	P1
4.			
5.			

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1. Individual Assets (H)									
2. [redacted] - stock	G	Dividend	M	V					
3. [redacted] - stock	G	Dividend	N	V					
4. [redacted] - stock	G	Dividend	M	V					
5. [redacted] - stock	G	Dividend	O	V					
6. [redacted] - stock	H1	Dividend	N	V					
7. Palm Beach Imports, Inc. - stock	G	Dividend	P1	V					
8. [redacted] - stock	G	Dividend	N	V					
9. [redacted] - stock	G	Dividend	M	V					
10. [redacted] - stock	G	Dividend	M	V					
11. European Motorcars of Littleton, Inc. - stock	F	Dividend	N	V					
12. Bank of America/Merrill Lynch (cash deposits and money market acct)	F	Interest	P1	T					
13. Great West Life Insurance - Whole life policy		None	M	T					
14. Clear Creek Station Development LLLP		None	O	U					
15. 3150 GMD, LLC		None	M	U					
16. 597 Buttonwood, LLC	G	Distribution	M	U					
17. Stripe Inc. Common Stock Cl B		None	K	T					

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
B =$1,001 - $2,500
C =$2,501 - $5,000
D =$5,001 - $15,000
E =$15,001 - $50,000
F =$50,001 - $100,000
G =$100,001 - $1,000,000
H1 =$1,000,001 - $5,000,000
H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
P1 =$1,000,001 - $5,000,000
P2 =$5,000,001 - $25,000,000
P3 =$25,000,001 - $50,000,000
P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
S =Assessment
T =Cash Market
U =Book Value
V =Other
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
18. [redacted] (Property, Bradley Beach, NJ)	F	Rent	O	U					
19. UBS Bank (cash)	A	Interest	K	T					
20. Account #1 (H)									
21. Goldman Sachs Bank Deposit (cash)	D	Interest	N	T					
22. Vanguard S&P 500 ETF (VOO)	C	Dividend	N	T					
23. GS Tax-Advantaged Global Equity Portfolio Class P (GSKPX)	D	Dividend	N	T					
24. Account #2 (H)									
25. Goldman Sachs Bank Deposit (cash)	B	Interest	K	T					
26. Vanguard S&P 500 ETF (VOO)	A	Dividend	J	T					
27. GS Tax-Advantaged Global Equity Portfolio Class P (GSKPX)	A	Dividend	J	T					
28. Account #3 (H)									
29. Goldman Sachs Bank Deposit (cash)	B	Interest	K	T					
30. Vanguard S&P 500 ETF (VOO)	A	Dividend	L	T					
31. GS Tax-Advantaged Global Equity Portfolio Class P (GSKPX)	B	Dividend	L	T					
32. Account #4 (H)									
33. Black Rock Infl Prot Bnd Port K (Y)									
34. Vanguard Target Retire 2035 Fund (Y)									

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
35. TRowe Price Blue Chip Growth Fund I (Y)									
36. Account #5 (H)									
37. Protective Life Insurance Company - Whole Life Policy	G	Interest	P1	T					
38. JP Morgan cash and Money deposits		None	J	T					
39. JPM Liquid Asset MM Fund - Instl Fund (cash eq.)	E	Interest	N	T					
40. Account #6 (H)									
41. [redacted] stock		None	M	U					
42. Account #7 (H)									
43. Fidelity 500 Index Fund (FXAIX)	A	Dividend	L	T	Buy	03/22/24	J		
44.					Buy (add'l)	06/24/24	J		
45.					Buy (add'l)	08/12/24	J		
46.					Buy (add'l)	09/16/24	J		
47.					Buy (add'l)	11/22/24	J		
48.					Buy (add'l)	12/16/24	J		
49. Financial Select Sector SPDR (XLF)	A	Dividend	J	T	Buy	03/22/24	J		
50.					Buy (add'l)	12/16/24	J		
51. Industrial Select Sect SPDR (XLI)	A	Dividend	J	T	Buy	11/22/24	J		

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	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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52. Six Circle MGD EQ US Uncon (CMEUX)	A	Dividend	M	T	Buy	03/22/24	K		
53.					Buy (add'l)	06/24/24	K		
54.					Buy (add'l)	08/12/24	J		
55.					Buy (add'l)	09/16/24	J		
56.					Buy (add'l)	11/22/24	J		
57.					Buy (add'l)	12/16/24	K		
58. Vanguard Financials ETF (VFH)	A	Dividend	J	T	Buy	06/24/24	J		
59. iShares Core S&P Midcap ETF (IJH)	A	Dividend	J	T	Buy	06/24/24	J		
60. Fidelity Intl Indx-Inst Prm (FSPSX)	A	Dividend	J	T	Buy	03/22/24	J		
61.					Buy (add'l)	06/24/24	J		
62.					Sold (part)	11/22/24	J		
63. JPMorgan Betabuilders Canada (BBCA)	A	Dividend	J	T	Buy	03/22/24	J		
64.					Buy (add'l)	06/24/24	J		
65.					Buy (add'l)	12/16/24	J		
66. Six Circle MGD Eq Intl Uncon (CMIUX)	A	Dividend	K	T	Buy	03/22/24	J		
67.					Buy (add'l)	06/24/24	J		
68.					Buy (add'l)	08/12/24	J		

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	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000		
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000		
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000		
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69.					Buy (add'l)	09/16/24	J		
70.					Sold (part)	11/22/24	J		
71.					Buy (add'l)	12/16/24	J		
72. JPMorgan Betabuilders Europe ETF (BBEU)	A	Dividend	J	T					
73. JPMorgan Betabuilders Japan ETF (BBJP)	A	Dividend	J	T	Buy	03/22/24	J		
74.					Buy (add'l)	06/24/24	J		
75.					Buy (add'l)	12/16/24	J		
76. JPMorgan Betabuilders Develo (BBAX)	A	Dividend	J	T					
77. Account #8 (H)									
78. US Dollar JPM Deposit Sweep (cash)	A	Interest	J	T					
79. JPM Liq Asst MM Fd-Cap (CJLXX) (cash eq.)	E	Dividend	J	T	Sold (part)	03/22/24	M		
80.					Sold (part)	06/21/24	M		
81.					Sold (part)	08/05/24	L		
82.					Sold (part)	09/13/24	L		
83.					Sold (part)	12/13/24	M		
84. Broadcom Inc (AVGO)	A	Dividend	M	T					
85. Energy Select Sector SPDR (XLE)	B	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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86. O'Reilly Automotive Inc (ORLY)		None	K	T					
87. Steel Dynamics Inc (STLD)	B	Dividend	L	T					
88. Account #9 (H)									
89. US Dollar JPM Deposit Sweep (cash)	A	Interest	K	T					
90. Fidelity 500 Index Fund (FXAIX)	C	Dividend	N	T	Buy	06/24/24	K		
91.					Buy (add'l)	08/05/24	K		
92.					Buy (add'l)	09/17/24	K		
93.					Buy (add'l)	11/22/24	J		
94.					Buy (add'l)	12/16/24	K		
95. Financial Select Sector SPDR (XLF)	A	Dividend	K	T	Buy	03/22/24	J		
96.					Buy (add'l)	08/05/24	J		
97.					Buy (add'l)	09/17/24	J		
98. Industrial Select Sect SPDR (XLI)	A	Dividend	J	T	Buy	11/22/24	J		
99. Six Circle MGD Eq US Uncon (CMEUX)	D	Dividend	O	T	Buy	03/22/24	M		
100.					Buy (add'l)	06/24/24	L		
101.					Buy (add'l)	08/05/24	K		
102.					Buy (add'l)	09/17/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
103.					Buy (add'l)	11/22/24	J		
104.					Buy (add'l)	12/16/24	L		
105. Vanguard Financials ETF (VFH)	A	Dividend	J	T	Buy	06/24/24	J		
106. iShares Core S&P Midcap ETF (IJH)	A	Dividend	K	T	Buy	03/22/24	J		
107.					Buy (add'l)	06/24/24	J		
108.					Buy (add'l)	08/05/24	J		
109.					Buy (add'l)	09/17/24	J		
110.					Buy (add'l)	12/16/24	J		
111. Fidelity Intl Indx-Inst PRM (FSPSX)	A	Dividend	K	T	Buy	03/22/24	J		
112.					Buy (add'l)	06/24/24	J		
113.					Buy (add'l)	08/05/24	J		
114.					Buy (add'l)	09/17/24	J		
115.					Sold (part)	11/22/24	K		
116.					Buy (add'l)	12/16/24	J		
117. JPMorgan Betabuilders Canada (BBCA)	A	Dividend	K	T	Buy	03/22/24	J		
118.					Buy (add'l)	06/24/24	J		
119.					Buy (add'l)	08/05/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
120.					Buy (add'l)	09/17/24	J		
121.					Buy (add'l)	12/16/24	J		
122. Six Circle MGD Eq Intl Uncon (CMIUX)	D	Dividend	M	T	Buy	03/22/24	K		
123.					Buy (add'l)	06/24/24	K		
124.					Buy (add'l)	08/05/24	K		
125.					Buy (add'l)	09/17/24	K		
126.					Sold (part)	11/22/24	J		
127.					Buy (add'l)	12/16/24	K		
128. JPMorgan Betabuilders Europe ETF (BBEU)	A	Dividend	K	T	Buy	03/22/24	J		
129.					Buy (add'l)	06/24/24	J		
130.					Buy (add'l)	08/05/24	J		
131.					Buy (add'l)	09/17/24	J		
132.					Buy (add'l)	12/16/24	J		
133. JPMorgan Betabuilders Japan ETF (BBJP)	B	Dividend	L	T	Buy	03/22/24	J		
134.					Buy (add'l)	06/24/24	J		
135.					Buy (add'l)	08/05/24	J		
136.					Buy (add'l)	09/17/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
137.					Buy (add'l)	12/16/24	J		
138. JPMorgan Betabuilders Develo (BBAX)	A	Dividend	K	T	Buy	03/22/24	J		
139.					Buy (add'l)	06/24/24	J		
140.					Buy (add'l)	08/05/24	J		
141.					Buy (add'l)	09/17/24	J		
142.					Buy (add'l)	12/16/24	J		
143. Account #10 (H)									
144. Carlyle Tactical Private Credit N (Y)									
145. Account #11 (H)									
146. GS FS Gov. MM Fund Mutual Fund (cash eq.)	A	Dividend			Buy (add'l)	05/02/24	M		
147.					Sold (part)	05/08/24	M		
148.					Buy (add'l)	09/23/24	M		
149.					Buy (add'l)	09/24/24	J		
150.					Sold	09/25/24	M		
151. iShares Russell 2000 ETF (IWM)	A	Dividend	K	T					
152. Xtrackers MSCI EAFE Hedged Equity ETF (DBEF)	A	Dividend	K	T					
153. iShares MSCI EAFE ETF (EFA)	A	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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☐ NONE *(No reportable income, assets, or transactions.)*

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154. Widsomtree Eur Hdgd Eq Fd CMN (HEDJ)	A	Dividend	K	T					
155. UBS AG London Branch Structured Note (90307DKB7)		None	M	T	Buy	05/01/24	M		
156. The Bank of Nova Scotia Linked to Euro Stoxx (BNSSX521)		None	M	T	Buy	09/18/24	M		
157. Morgan Stanley Structured Note Lkd Basket Indices (61776RH49)		None	M	T	Buy	09/19/24	M		
158. UBS AG Lkd IDEEL Eq Greater St Note		None			Sold	05/02/24	M		
159. Account #12 (H)									
160. GS FS Gov. MM Fund Mutual Fund (cash equiv)	E	Dividend	N	T	Sold (part)	03/04/24	J		
161.					Sold (part)	04/11/24	J		
162.					Sold (part)	04/15/24	J		
163.					Sold (part)	04/30/24	K		
164.					Sold (part)	05/29/24	J		
165.					Sold (part)	06/20/24	J		
166.					Sold (part)	07/19/24	K		
167.					Sold (part)	07/29/24	J		
168.					Sold (part)	07/31/24	J		
169.					Buy (add'l)	08/05/24	O		
170.					Sold (part)	09/20/24	M		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000
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2. Value Codes (See Columns C1 and D3)
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N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000
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171.					Sold (part)	09/23/24	J		
172.					Sold (part)	09/25/24	J		
173.					Sold (part)	09/26/24	M		
174.					Sold (part)	10/04/24	J		
175.					Sold (part)	10/22/24	J		
176.					Sold (part)	10/24/24	J		
177.					Sold (part)	10/29/24	J		
178.					Sold (part)	11/12/24	J		
179.					Sold (part)	12/04/24	J		
180.					Sold (part)	12/10/24	J		
181.					Sold (part)	12/16/24	J		
182. Account #13 (H)									
183. GS Bank USA Deposit (cash)	B	Interest	J	T					
184. Alphabet Inc. CMN Class A (GOOGL)	A	Dividend	M	T					
185. Amazon.com Inc Cmn (AMZN)		None	M	T					
186. American Express Co. CMN (AXP)	B	Dividend	M	T					
187. Amgen Inc. CMN		None			Sold	07/26/24	L	E	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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188. Apple Inc. CMN (AAPL)	B	Dividend	N	T					
189. Berkshire Hathaway Inc. Class B (BRKB)		None	M	T					
190. Cisco Systems, Inc. CMN		None			Sold	07/26/24	J	D	
191. Healthcare SVCS Group Inc CMN		None			Sold	07/26/24	J	C	
192. Intl Business Machines Corp CMN		None			Sold	07/26/24	K	E	
193. Kyndrl Holdings Inc CMN		None			Sold	07/26/24	J		
194. Medtronic Public Limited Compa CMN		None			Sold	07/26/24	J	A	
195. Microsoft Corporation CMN (MSFT)	B	Dividend	M	T					
196. Nvidia Corporation CMN (NVDA)	A	Dividend	L	T					
197. iShares Core S&P 500 ETF CMN (IVV)	D	Dividend	O	T	Buy (add'l)	08/02/24	N		
198. Teva Pharmaceutical IND LTD ADS		None			Sold	07/26/24	K	D	
199. The Southern Co. CMN		None			Sold	07/26/24	K	D	
200. Account #14 (H)									
201. GS FS Gov. MM Fund Mutual Fund (cash equiv)	E	Dividend	N	T	Sold (part)	03/04/24	J		
202.					Sold (part)	04/11/24	J		
203.					Sold (part)	04/15/24	J		
204.					Sold (part)	04/30/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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205.					Sold (part)	05/29/24	J		
206.					Sold (part)	06/20/24	J		
207.					Sold (part)	07/19/24	K		
208.					Sold (part)	07/29/24	J		
209.					Sold (part)	07/31/24	J		
210.					Buy (add'l)	08/05/24	N		
211.					Sold (part)	09/20/24	M		
212.					Sold (part)	09/23/24	J		
213.					Sold (part)	09/25/24	J		
214.					Sold (part)	09/26/24	M		
215.					Sold (part)	10/04/24	J		
216.					Sold (part)	10/22/24	J		
217.					Sold (part)	10/24/24	J		
218.					Sold (part)	10/29/24	J		
219.					Sold (part)	11/12/24	J		
220.					Sold (part)	12/04/24	J		
221.					Sold (part)	12/10/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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222.					Sold (part)	12/16/24	J		
223. Account #15 (H)									
224. GS FS Gov. MM Fund Mutual Fund (cash eq.)	A	Dividend			Buy (add'l)	05/02/24	M		
225.					Sold (part)	05/08/24	M		
226.					Buy (add'l)	09/20/24	M		
227.					Buy (add'l)	09/24/24	J		
228.					Sold	09/25/24	M		
229. iShares Russell 2000 ETF (IWM)	A	Dividend	K	T					
230. Xtrackers MSCI EAFE Hedged Equity ETF (DBEF)	A	Dividend	K	T					
231. iShares MSCI EAFE ETF (EFA)	A	Dividend	K	T					
232. Widsomtree Eur Hdgd Eq Fd CMN (HEDJ)	A	Dividend	K	T					
233. UBS AG London Branch Structured Note (CUSIP 90307DKB7)		None	M	T	Buy	05/01/24	M		
234. The Bank of Nova Scotia Linked to Euro Stoxx (BNSSX521)		None	M	T	Buy	09/18/24	M		
235. Morgan Stanley Structured Note Linked Basket Indices (61776RH49)		None	M	T	Buy	09/19/24	M		
236. UBS AG Lkd IDEEL Eq Greater St Note		None			Sold	05/02/24	M		
237. Account #16 (H)									
238. GS Bank USA Deposit (cash)	A	Interest	K	T					

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
B =$1,001 - $2,500
C =$2,501 - $5,000
D =$5,001 - $15,000
E =$15,001 - $50,000
F =$50,001 - $100,000
G =$100,001 - $1,000,000
H1 =$1,000,001 - $5,000,000
H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
P1 =$1,000,001 - $5,000,000
P2 =$5,000,001 - $25,000,000
P3 =$25,000,001 - $50,000,000
P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
S =Assessment
T =Cash Market
U =Book Value
V =Other
W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
239. Alphabet Inc. CMN Class A (GOOGL)	A	Dividend	M	T					
240. Amazon.com Inc Cmn (AMZN)		None	M	T					
241. American Express Co. CMN (AXP)	B	Dividend	M	T					
242. Amgen Inc. CMN		None			Sold	07/26/24	K	E	
243. Apple Inc. CMN (AAPL)	B	Dividend	N	T					
244. Astrazenca PLC Spons ADR Sponsored ADR CMN		None			Sold	07/26/24	J	D	
245. Automatic Data Processing Inc CMN		None			Sold	07/26/24	J	C	
246. Berkshire Hathaway Inc. Class B (BRKB)		None	M	T					
247. Healthcare SVCS Group Inc CMN		None			Sold	07/26/24	J	D	
248. Intel Coporation CMN		None			Sold	07/26/24	J	D	
249. Intl Business Machines Corp CMN		None			Sold	07/26/24	K	E	
250. Kyndryl Holdings Inc CMN		None			Sold	07/26/24	J	A	
251. Microsoft Corporation CMN (MSFT)	A	Dividend	M	T					
252. Nvidia Corporation CMN (NVDA)	A	Dividend	L	T					
253. iShares Core S&P 500 ETF CMN (IVV)	D	Dividend	O	T	Buy (add'l)	08/02/24	N		
254. Teva Pharmaceutical IND LTD ADS		None			Sold	07/26/24	K	D	
255. Viatris Inc CMN		None			Sold	07/26/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
256. Account #17 (H)									
257. GS FS Gov. MM Fund Mutual Fund (cash eq.)	A	Dividend			Buy (add'l)	05/02/24	M		
258.					Sold (part)	05/08/24	M		
259.					Buy (add'l)	09/23/24	M		
260.					Buy (add'l)	09/24/24	J		
261.					Sold	09/25/24	M		
262. iShares Russell 2000 ETF (IWM)	A	Dividend	K	T					
263. Xtrackers MSCI EAFE Hedged Equity ETF (DBEF)	A	Dividend	K	T					
264. iShares MSCI EAFE ETF (EFA)	A	Dividend	K	T					
265. Widsomtree Eur Hdgd Eq Fd CMN (HEDJ)	A	Dividend	K	T					
266. UBS AG Linked to Basket of Indices Better of Cntngnt CPN (OUIDEE94)		None	M	T	Buy	05/01/24	M		
267. The Bank of Nova Scotia Linked to Euro Stoxx (BNSSX521)		None	M	T	Buy	09/18/24	M		
268. Morgan Stanley Structured Note Lkd Basket Indices (61776RH49)		None	M	T	Buy	09/19/24	M		
269. UBS AG Lkd IDEEL Eq Greater St Note		None			Sold	05/02/24	M		
270. Account #18 (H)									
271. GS FS Gov. MM Fund Mutual Fund (cash eq.)	E	Dividend	N	T	Sold (part)	03/04/24	J		
272.					Sold (part)	04/11/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
273.					Sold (part)	04/15/24	J		
274.					Sold (part)	04/30/24	K		
275.					Sold (part)	05/29/24	J		
276.					Sold (part)	06/20/24	J		
277.					Sold (part)	07/19/24	K		
278.					Sold (part)	07/29/24	J		
279.					Sold (part)	07/31/24	J		
280.					Buy (add'l)	08/05/24	N		
281.					Sold (part)	09/20/24	M		
282.					Sold (part)	09/23/24	J		
283.					Sold (part)	09/25/24	J		
284.					Sold (part)	09/26/24	M		
285.					Sold (part)	10/04/24	J		
286.					Sold (part)	10/22/24	J		
287.					Sold (part)	10/24/24	J		
288.					Sold (part)	10/29/24	J		
289.					Sold (part)	11/12/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
290.					Sold (part)	12/04/24	J		
291.					Sold (part)	12/10/24	J		
292.					Sold (part)	12/16/24	J		
293. Account #19 (H)									
294. GS FS Gov. MM Fund Mutual Fund (cash equiv)	A	Dividend	J	T					
295. Alphabet Inc. CMN Class A (GOOGL)	A	Dividend	M	T					
296. Amazon.com Inc Cmn (AMZN)		None	M	T					
297. American Express Co. CMN (AXP)	B	Dividend	N	T					
298. Apple Inc. CMN (AAPL)	B	Dividend	N	T					
299. Automatic Data Processing Inc CMN		None			Sold	07/26/24	K	E	
300. Berkshire Hathaway Inc. Class B (BRKB)		None	M	T					
301. Elbit System LTD CMN		None			Sold	07/26/24	J	D	
302. Intl Business Machines Corp CMN		None			Sold	07/26/24	K	E	
303. Kyndryl Holdings Inc CMN		None			Sold	07/26/24	J	A	
304. Microsoft Corporation CMN (MSFT)	B	Dividend	M	T					
305. Nvidia Corporation CMN (NVDA)	A	Dividend	L	T					
306. iShares Core S&P 500 ETF CMN (IVV)	D	Dividend	O	T	Buy (add'l)	08/02/24	N		

1. Income Gain Codes: (See Columns B1 and D4) A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period: (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period: (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period: (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
307. Pfizer Inc. CMN (PFE)		None			Sold	07/26/24	J		
308. Teva Pharmaceutical IND LTD ADS		None			Sold	07/26/24	K	D	
309. Viatris Inc CMN (Y)									
310. Account #20 (H)									
311. GS FS Gov. MM Fund Mutual Fund (cash equiv)	A	Dividend	K	T	Buy (add'l)	03/04/24	J		
312.					Sold (part)	03/05/24	J		
313.					Buy (add'l)	03/18/24	J		
314.					Buy (add'l)	04/10/24	J		
315.					Buy (add'l)	04/11/24	K		
316.					Buy (add'l)	04/15/24	J		
317.					Sold (part)	04/17/24	K		
318.					Buy (add'l)	04/29/24	J		
319.					Sold (part)	04/30/24	J		
320.					Buy (add'l)	04/30/24	L		
321.					Sold (part)	05/01/24	K		
322.					Sold (part)	05/06/24	K		
323.					Buy (add'l)	05/08/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
324.					Buy (add'l)	05/13/24	K		
325.					Sold (part)	05/16/24	J		
326.					Sold (part)	05/22/24	J		
327.					Sold (part)	05/23/24	J		
328.					Buy (add'l)	05/29/24	J		
329.					Buy (add'l)	05/29/24	J		
330.					Sold (part)	05/31/24	K		
331.					Buy (add'l)	06/13/24	J		
332.					Buy (add'l)	06/20/24	K		
333.					Sold (part)	06/26/24	K		
334.					Buy (add'l)	06/28/24	K		
335.					Buy (add'l)	07/11/24	K		
336.					Sold (part)	07/12/24	J		
337.					Buy (add'l)	07/15/24	J		
338.					Sold (part)	07/16/24	K		
339.					Sold (part)	07/19/24	J		
340.					Buy (add'l)	07/19/24	L		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
341.					Sold (part)	07/22/24	J		
342.					Sold (part)	07/25/24	K		
343.					Sold (part)	07/26/24	J		
344.					Buy (add'l)	07/29/24	J		
345.					Buy (add'l)	07/31/24	J		
346.					Sold (part)	08/01/24	J		
347.					Sold (part)	08/05/24	J		
348.					Buy (add'l)	08/06/24	J		
349.					Buy (add'l)	08/22/24	J		
350.					Buy (add'l)	08/27/24	J		
351.					Sold (part)	09/05/24	J		
352.					Buy (add'l)	09/06/24	J		
353.					Buy (add'l)	09/12/24	J		
354.					Buy (add'l)	09/17/24	J		
355.					Buy (add'l)	09/23/24	J		
356.					Sold (part)	10/03/24	J		
357.					Sold (part)	10/04/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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358.					Buy (add'l)	10/08/24	J		
359.					Buy (add'l)	10/09/24	J		
360.					Sold (part)	10/16/24	J		
361.					Sold (part)	10/21/24	J		
362.					Buy (add'l)	10/22/24	K		
363.					Sold (part)	10/23/24	K		
364.					Buy (add'l)	10/24/24	K		
365.					Buy (add'l)	10/29/24	K		
366.					Sold (part)	10/30/24	K		
367.					Sold (part)	10/31/24	K		
368.					Buy (add'l)	11/12/24	K		
369.					Sold (part)	11/14/24	K		
370.					Sold (part)	11/18/24	J		
371.					Buy (add'l)	11/26/24	J		
372.					Buy (add'l)	12/04/24	K		
373.					Sold (part)	12/09/24	K		
374.					Buy (add'l)	12/10/24	K		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
375.					Sold (part)	12/12/24	J		
376.					Sold (part)	12/13/24	K		
377.					Buy (add'l)	12/16/24	K		
378.					Buy (add'l)	12/18/24	J		
379.					Sold (part)	12/19/24	K		
380.					Buy (add'l)	12/20/24	J		
381.					Buy (add'l)	12/23/24	J		
382.					Buy (add'l)	12/27/24	J		
383.					Buy (add'l)	12/30/24	J		
384.					Buy (add'l)	12/31/24	J		
385. Petershill IV LLC		None	L	T	Buy (add'l)	05/23/24	J		
386.					Sold (part)	06/26/24	J		
387.					Sold (part)	12/18/24	J		
388. LGP Equity Investors IX Access		None	M	T	Buy (add'l)	06/26/24	K		
389.					Buy (add'l)	11/14/24	K		
390. CD&R XII Flagship Access LLC		None	L	T	Buy (add'l)	05/01/24	K		
391.					Sold (part)	10/09/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
392.					Buy (add'l)	10/30/24	K		
393. GTCR XIV Access LLC		None	K	T	Buy	10/23/24	K		
394. Berkshire XI Access LLC (Y)									
395. GTCR Middle Market Opportuniti (Y)									
396. Industry Ventures Direct III A		None	M	T	Buy (add'l)	04/17/24	K		
397.					Buy (add'l)	07/12/24	J		
398.					Buy (add'l)	12/13/24	K		
399. Menlo Special Opportunities III Access LLC		None	M	T	Buy (add'l)	06/26/24	K		
400.					Buy (add'l)	07/22/24	J		
401.					Buy (add'l)	10/31/24	K		
402.					Buy (add'l)	11/18/24	J		
403. LS Opportunities Access LLC		None	M	T	Buy (add'l)	03/05/24	J		
404.					Buy (add'l)	04/17/24	J		
405.					Buy (add'l)	05/31/24	K		
406.					Buy (add'l)	08/01/24	J		
407.					Buy (add'l)	10/04/24	L		
408.					Buy (add'l)	10/31/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

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409.					Buy (add'l)	12/19/24	K		
410. Vintage VII/West Street Capital Partners VII Access LP		None	N	T	Sold (part)	05/08/24	J		
411.					Sold (part)	05/29/24	J		
412.					Sold (part)	06/13/24	J		
413.					Sold (part)	07/11/24	J		
414.					Buy (add'l)	07/26/24	J		
415.					Sold (part)	08/01/24	J		
416.					Sold (part)	09/12/24	J		
417.					Sold (part)	10/08/24	J		
418. Private Equity Managers (2016) LP		None	N	T	Sold (part)	06/28/24	J		
419.					Sold (part)	08/27/24	J		
420.					Sold (part)	09/23/24	J		
421.					Sold (part)	12/27/24	J		
422. Vintage VIII/West Street Capit		None	N	T	Sold (part)	07/11/24	J		
423.					Buy (add'l)	07/26/24	J		
424.					Buy (add'l)	08/05/24	J		
425.					Buy (add'l)	10/21/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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426.					Sold (part)	11/18/24	J		
427.					Sold (part)	12/13/24	J		
428. Private Equity Managers (2021)		None	M	T	Buy (add'l)	07/19/24	J		
429.					Buy (add'l)	10/16/24	J		
430.					Buy (add'l)	12/12/24	J		
431. Insight Partners X Follow-On Access LP		None	K	T					
432. Insight Venture Partners X Access LP		None	N	T	Sold (part)	05/13/24	K		
433.					Sold (part)	08/01/24	J		
434.					Sold (part)	09/17/24	J		
435.					Sold (part)	10/30/24	J		
436.					Sold (part)	12/13/24	J		
437.					Sold (part)	12/31/24	J		
438. TCV XI Access LLC		None	L	T	Buy (add'l)	05/22/24	J		
439. TPG Tech Adjacencies II Access		None	M	T	Buy (add'l)	05/06/24	K		
440.					Sold (part)	06/28/24	K		
441.					Buy (add'l)	08/05/24	J		
442.					Sold (part)	09/06/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

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443.					Buy (add'l)	10/03/24	J		
444.					Buy (add'l)	12/09/24	K		
445.					Sold (part)	12/23/24	J		
446.					Sold (part)	12/30/24	J		
447. TCV XII Access LLC		None	K	T	Buy (add'l)	04/30/24	J		
448.					Buy (add'l)	07/25/24	K		
449. Viola Growth IV Access LP		None	K	T	Buy (add'l)	07/16/24	K		
450. Insight Partners XIII Access L		None	J	T	Buy (add'l)	09/05/24	J		
451. Monarch V Select Opportunities		None	M	T	Sold (part)	07/11/24	K		
452.					Sold (part)	08/22/24	J		
453.					Sold (part)	12/10/24	J		
454.					Sold (part)	12/20/24	J		
455. Account #21 (H)									
456. US Dollar JPM Deposit Sweep (cash)	C	Interest	M	T					
457. Fidelity 500 Index Fund (FXAIX)	E	Dividend	P1	T	Buy	03/22/24	M		
458.					Buy (add'l)	06/24/24	N		
459.					Buy (add'l)	08/06/24	M		

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460.					Buy (add'l)	09/16/24	M		
461.					Buy (add'l)	11/22/24	L		
462.					Buy (add'l)	12/16/24	N		
463. Financial Select Sector SPDR (XLF)	C	Dividend	N	T	Buy	03/22/24	L		
464.					Buy (add'l)	08/06/24	K		
465.					Buy (add'l)	09/16/24	K		
466.					Buy (add'l)	12/16/24	K		
467. Industrial Select Sect SPDR (XLI)	A	Dividend	L	T	Buy	11/22/24	K		
468.					Buy (add'l)	12/16/24	J		
469. Six Circle MGD Eq US Uncon (CMEUX)	E	Dividend	P1	T	Buy	03/22/24	O		
470.					Buy (add'l)	06/24/24	O		
471.					Buy (add'l)	08/06/24	N		
472.					Buy (add'l)	09/16/24	N		
473.					Buy (add'l)	11/22/24	L		
474.					Buy (add'l)	12/16/24	O		
475. Vanguard Financial ETF (VFH)	A	Dividend	L	T	Buy	06/24/24	L		
476. iShares Core S&P Midcap ETF (IJH)	B	Dividend	M	T	Buy	03/22/24	K		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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477.					Buy (add'l)	06/24/24	K		
478.					Buy (add'l)	08/06/24	J		
479.					Buy (add'l)	09/16/24	K		
480.					Buy (add'l)	12/16/24	K		
481. Fidelity Intl Indx-Inst PRM (FSPSX)	C	Dividend	M	T	Buy	03/22/24	K		
482.					Buy (add'l)	06/24/24	K		
483.					Buy (add'l)	08/06/24	K		
484.					Buy (add'l)	09/16/24	K		
485.					Sold (part)	11/22/24	L		
486.					Buy (add'l)	12/16/24	K		
487. JPMorgan Betabuilders Canada (BBCA)	C	Dividend	N	T	Buy	03/22/24	K		
488.					Buy (add'l)	06/24/24	K		
489.					Buy (add'l)	08/06/24	J		
490.					Buy (add'l)	09/16/24	J		
491.					Buy (add'l)	12/16/24	K		
492. Six Circle MGD Eq Intl Uncon (CMIUX)	E	Dividend	P1	T	Buy	03/22/24	M		
493.					Buy (add'l)	06/24/24	N		

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494.					Buy (add'l)	08/06/24	M		
495.					Buy (add'l)	09/16/24	M		
496.					Sold (part)	11/22/24	L		
497.					Buy (add'l)	12/16/24	M		
498. JPMorgan Betabuilders Europe ETF (BBEU)	C	Dividend	M	T	Buy	03/22/24	K		
499.					Buy (add'l)	06/24/24	K		
500.					Buy (add'l)	08/06/24	J		
501.					Buy (add'l)	09/16/24	J		
502.					Buy (add'l)	12/16/24	K		
503. JPMorgan Betabuilders Japan ETF (BBJP)	D	Dividend	N	T	Buy	03/22/24	L		
504.					Buy (add'l)	06/24/24	L		
505.					Buy (add'l)	08/06/24	K		
506.					Buy (add'l)	09/16/24	K		
507.					Buy (add'l)	12/16/24	L		
508. JPMorgan Betabuilders Develo (BBAX)	C	Dividend	M	T	Buy	03/22/24	K		
509.					Buy (add'l)	06/24/24	K		
510.					Buy (add'l)	08/06/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
511.					Buy (add'l)	08/06/24	J		
512.					Buy (add'l)	09/16/24	J		
513.					Buy (add'l)	12/16/24	K		
514. Account #22 (H)									
515. JPM Liq Asst MM FD-Cap (CJLXX) (cash eq.)	G	Dividend	P2	T	Buy (add'l)	03/01/24	L		
516.					Buy (add'l)	03/08/24	N		
517.					Sold (part)	03/22/24	P1		
518.					Sold (part)	03/25/24	O		
519.					Buy (add'l)	04/01/24	L		
520.					Buy (add'l)	04/18/24	O		
521.					Buy (add'l)	05/01/24	L		
522.					Buy (add'l)	05/21/24	N		
523.					Buy (add'l)	06/03/24	L		
524.					Sold (part)	06/17/24	O		
525.					Sold (part)	06/21/24	P1		
526.					Buy (add'l)	07/01/24	L		
527.					Buy (add'l)	08/01/24	L		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
528.					Sold (part)	08/05/24	O		
529.					Buy (add'l)	08/21/24	M		
530.					Buy (add'l)	09/03/24	L		
531.					Sold (part)	09/04/24	K		
532.					Sold (part)	09/13/24	O		
533.					Buy (add'l)	10/01/24	L		
534.					Buy (add'l)	10/22/24	N		
535.					Buy (add'l)	11/01/24	L		
536.					Buy (add'l)	11/07/24	N		
537.					Buy (add'l)	12/02/24	L		
538.					Buy (add'l)	12/12/24	N		
539.					Sold (part)	12/13/24	P1		
540. Broadcom Inc (AVGO)	C	Dividend	N	T					
541. Energy Select Sector SPDR (XLE)	C	Dividend	L	T					
542. O'Reilly Automotive Inc (ORLY)		None	M	T					
543. Steel Dynamics Inc (STLD)	B	Dividend	M	T					
544. Account #23 (H)									

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
545. GS FS Gov. MM Fund Mutual Fund (cash equiv)	G	Dividend	P2	T	Sold (part)	03/04/24	K		
546.					Sold (part)	04/11/24	K		
547.					Sold (part)	04/15/24	K		
548.					Sold (part)	04/30/24	K		
549.					Sold (part)	05/07/24	O		
550.					Sold (part)	05/29/24	K		
551.					Sold (part)	06/20/24	L		
552.					Sold (part)	06/21/24	O		
553.					Sold (part)	07/08/24	J		
554.					Sold (part)	07/15/24	K		
555.					Sold (part)	07/19/24	L		
556.					Sold (part)	07/23/24	J		
557.					Sold (part)	07/29/24	K		
558.					Sold (part)	09/03/24	J		
559.					Sold (part)	10/04/24	L		
560.					Sold (part)	10/22/24	K		
561.					Sold (part)	10/24/24	K		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
562.					Sold (part)	10/29/24	L		
563.					Sold (part)	11/12/24	K		
564.					Sold (part)	12/10/24	L		
565.					Sold (part)	12/16/24	K		
566. Account #24 (H)									
567. GS FS Gov. MM Fund Mutual Fund (cash equiv)	A	Dividend			Buy	05/07/24	O		
568.					Sold	05/08/24	O		
569.					Buy	07/23/24	J		
570.					Sold	07/29/24	J		
571.					Buy	10/22/24	J		
572.					Sold	10/30/24	J		
573. UBS AG Linked to Basket of Indices Better of Cntngnt CPN (OUIDEE94)		None	O	T	Buy	05/01/24	O		
574. National Bank of Canada-New Yo Linked to Euro Stoxx (NBCSX508)		None	O	T	Buy	06/13/24	O		
575. Account #25 (H)									
576. GS FS Gov. MM Fund Mutual Fund (cash eq.)	A	Dividend	J	T	Buy (add'l)	03/04/24	K		
577.					Sold (part)	03/05/24	K		
578.					Buy (add'l)	04/11/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
579.					Buy (add'l)	04/11/24	K		
580.					Buy (add'l)	04/15/24	K		
581.					Sold (part)	04/17/24	L		
582.					Buy (add'l)	04/30/24	K		
583.					Sold (part)	05/01/24	K		
584.					Buy (add'l)	05/29/24	K		
585.					Sold (part)	05/31/24	K		
586.					Buy (add'l)	06/20/24	L		
587.					Sold (part)	06/27/24	L		
588.					Buy (add'l)	07/08/24	J		
589.					Sold (part)	07/12/24	J		
590.					Buy (add'l)	07/15/24	K		
591.					Sold (part)	07/16/24	K		
592.					Buy (add'l)	07/19/24	K		
593.					Sold (part)	07/22/24	J		
594.					Sold (part)	07/25/24	L		
595.					Buy (add'l)	07/29/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
596.					Sold (part)	08/01/24	K		
597.					Buy (add'l)	09/03/24	J		
598.					Sold (part)	09/05/24	J		
599.					Buy (add'l)	10/09/24	J		
600.					Buy (add'l)	10/22/24	K		
601.					Sold (part)	10/23/24	K		
602.					Buy (add'l)	10/24/24	K		
603.					Buy (add'l)	10/29/24	L		
604.					Sold (part)	10/30/24	K		
605.					Sold (part)	10/31/24	L		
606.					Buy (add'l)	11/12/24	K		
607.					Sold (part)	11/14/24	K		
608.					Sold (part)	11/18/24	J		
609.					Buy (add'l)	12/10/24	L		
610.					Buy (add'l)	12/11/24	J		
611.					Sold (part)	12/13/24	L		
612.					Buy (add'l)	12/16/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
613.					Sold (part)	12/19/24	K		
614. LGP Equity Investors IX Access		None	M	T	Buy (add'l)	06/26/24	K		
615.					Buy (add'l)	11/14/24	K		
616.					Sold (part)	12/11/24	J		
617. CD&R XII Flagship Access LLC		None	M	T	Buy (add'l)	05/01/24	K		
618.					Sold (part)	10/09/24	J		
619.					Buy (add'l)	10/30/24	K		
620. GTCR XIV Access LLC		None	K	T	Buy	10/23/24	K		
621. Industry Ventures Direct III A		None	M	T	Buy (add'l)	07/12/24	K		
622.					Buy (add'l)	12/13/24	L		
623. Menlo Special Opportunities III Access LLC		None	M	T	Buy (add'l)	06/26/24	K		
624.					Buy (add'l)	07/22/24	K		
625.					Buy (add'l)	10/31/24	K		
626.					Buy (add'l)	11/18/24	J		
627. LS Opportunities Access LLC		None	N	T	Buy (add'l)	03/05/24	K		
628.					Buy (add'l)	05/31/24	K		
629.					Buy (add'l)	08/01/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
630.					Buy (add'l)	10/04/24	L		
631.					Buy (add'l)	10/31/24	K		
632.					Buy (add'l)	12/19/24	K		
633. TCV XII Acess LLC		None	L	T	Buy (add'l)	07/25/24	L		
634. Viola Growth IV Access LP		None	K	T	Buy (add'l)	07/16/24	L		
635. Insight Partners XIII Access L		None	J	T	Buy (add'l)	09/05/24	J		
636. Account #26 (H)									
637. Carlyle Tactical Private Credit N (Y)									
638. Six Circle MGD Eq US Uncon (Y)									
639. Fidelity 500 Index Fund (Y)									
640. Six Circle MGD Eq Intl Uncon (Y)									
641. JPM Betabuilders Japan ETF (Y)									
642. Financial Select Sector SPDR (Y)									
643. Fidelity Intl Indx-Inst PRM (Y)									
644. JPM Beta Builders Canada (Y)									
645. iShares Core S&P Midcap ETF (Y)									
646. JPM Betabuilders Develo (Y)									

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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647. JPM Betabuilders Europe ETF (Y)									
648. Account #27 (H)									
649. Infinity Q Diversified Alpha Fund		None	J	T					
650. Account #28 (H)									
651. Mortgage recievable (Debtor: [redacted]	E	Interest	P1	T					
652. [redacted] stock	H1	Dividend	P1	W					
653. [redacted] stock	H2	Dividend	P3	W					
654. [redacted] stock	H1	Dividend	P2	W					
655. [redacted] stock	H2	Dividend	P2	W					
656. [redacted]. stock	G	Dividend	P1	W					
657. [redacted] stock	H1	Dividend	P2	W					
658. [redacted]	F	Distribution	O	U					
659. [redacted]	G	Distribution	P2	U					
660. [redacted]	G	Distribution	P1	U					
661. Bay Caddilac, Inc.		None	N	U					
662. Sarasota Condos LLC		None	M	U					
663. Lindell Bimini Square, LLC		None	O	U					

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J =$15,000 or less
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Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
664. Account #29 (H)									
665. [redacted] (Property, Vail, CO)	G	Rent	P2	U					
666. Bank of America/Merrill Lynch accounts (cash and money market acct)	B	Interest	M	T					
667. Merrill Lynch: US Treasury Bills	C	Interest	O	T					
668. Account #30 (H)									
669. GS FS Gov. MM Fund Mutual Fund (cash eq.)	A	Dividend	J	T	Buy (add'l)	03/04/24	L		
670.					Sold (part)	03/05/24	K		
671.					Sold (part)	03/06/24	K		
672.					Sold (part)	03/08/24	K		
673.					Buy (add'l)	04/02/24	J		
674.					Buy (add'l)	06/03/24	J		
675.					Sold (part)	06/04/24	J		
676.					Buy (add'l)	06/17/24	K		
677.					Sold (part)	06/20/24	K		
678.					Buy (add'l)	07/01/24	L		
679.					Sold (part)	07/02/24	L		
680.					Sold (part)	07/10/24	K		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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681.					Buy (add'l)	07/15/24	J		
682.					Sold (part)	07/16/24	J		
683.					Buy (add'l)	08/01/24	L		
684.					Sold (part)	08/07/24	K		
685.					Sold (part)	08/14/24	K		
686.					Buy (add'l)	08/15/24	J		
687.					Sold (part)	08/16/24	J		
688.					Buy (add'l)	09/03/24	L		
689.					Sold (part)	09/04/24	K		
690.					Sold (part)	09/09/24	K		
691.					Sold (part)	09/10/24	K		
692.					Buy (add'l)	10/01/24	J		
693.					Sold (part)	10/02/24	J		
694.					Buy (add'l)	12/02/24	K		
695.					Sold (part)	12/03/24	J		
696.					Buy (add'l)	12/03/24	K		
697.					Sold (part)	12/04/24	K		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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698.					Sold (part)	12/06/24	J		
699.					Sold (part)	12/09/24	K		
700. Amarillo Tex Jr College Dist. 5% Bond (023069LR6)	A	Interest	K	T	Buy	08/01/24	K		
701. Pflugervill Tex Indpt Sch 5%	A	Interest	J	T					
702. New Mexico St 5%	B	Interest	K	T					
703. Oregon St Dept Adminstrative Rev (68607VP74)	B	Interest	K	T	Buy	03/04/24	K		
704. Tex St Go 5%	B	Interest	K	T					
705. Lansing Mich Sch Dist 5%	B	Interest	K	T					
706. New Mexico Fin Auth Rev 5%	A	Interest	K	T					
707. Polk Cnty Iowa 5% Bond (731197R35)	A	Interest	K	T	Buy	08/13/24	K		
708. Clark Cnty Nev Sch Dist 5% (181059TB2)	A	Interest	J	T	Buy	10/02/24	J		
709. Florida St Dept Environmental 5% (34160WA46)	A	Interest	K	T	Buy	03/04/24	K		
710. Metropolitan Govt Nashville 5%	A	Interest	K	T					
711. Pima Cnty Ariz Swr 5% (721876VE7)	A	Interest	K	T	Buy	03/06/24	K		
712. Sarasota Cnty Fla Sch Brd Bond (80300QCP8)		None	K	T	Buy	07/01/24	K		
713. Rio Rancho N Mex Pub Sch Dist 4%	A	Interest	J	T					
714. Alabama Fed Aid Hwy Fin Auth Rev (010268CB4)	A	Interest	K	T	Buy	06/03/24	K		

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715.					Buy (add'l)	12/05/24	J		
716. Johnson Cnty Kans Uni Sch Dist 5%	A	Interest	J	T					
717. Port St Lucie FLA Cap Impt 4%	A	Interest	K	T					
718. St Paul Minn 5% (7928817G3)	A	Interest	K	T	Buy	04/01/24	K		
719. Rogers Ark Sales & Use Tax Re Rev 5% Bond (775080GL2)	A	Interest	K	T	Buy	08/01/24	K		
720. Hstn TX UTL Sys Fr Iss DTD PR Rev (44244CMV6)		None	J	T	Buy	12/02/24	J		
721. Salt River Proj Agricultural 5% AZ (79574CBR3)	A	Interest	K	T	Buy	06/18/24	K		
722. The Water Works Board Rev Bond (091096KL0)	A	Interest	K	T	Buy	07/09/24	K		
723. Western Minn Mun PWR Agy Minn Rev Bond (958697KG8)		None	J	T	Buy	07/15/24	J		
724. VA College Bldg Auth VA 5%	A	Interest	J	T					
725. Clear Creek Tex Indpt Sch Dist Go 5% Bond (184541FZ8)		None	K	T	Buy	09/04/24	K		
726. Gregory Portland Tex Indpt Sch 5% (397586RF7)	A	Interest	J	T	Buy	07/01/24	J		
727. Humble Tex Indpt Sch Dist 5% (445047FK4)	A	Interest	J	T	Buy	03/01/24	J		
728. Lower Merion PA Sch Dist 5% (548246LQ8)	A	Interest	J	T	Buy	08/15/24	J		
729. San Antonio Tex Wtr 5% (79642GGD8)	A	Interest	K	T	Buy	07/01/24	K		
730. Charlotte NC Arpt Rev Rev (161036PK8)		None	K	T	Buy	12/03/24	K		
731. Clark Cnty Nev Hwy Impt Rev Rev 5% (181000QL7)		None	K	T	Buy	08/06/24	K		

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732. Fulton Cnty GA Urban Redev Agy Rev 5% (3600065AG1)		None	J	T	Buy	09/06/24	J		
733. Florida St Dept Gen Svcs Div Rev 5% (341602F54)		None	J	T	Buy	09/09/24	J		
734. Wichita Kans Wtr & Swr Util (967338C93)		None	K	T	Buy	12/06/24	K		
735. Dallas Tex Area Rapid Tran Rev (235241RL2)	A	Interest	K	T	Buy	12/02/24	K		
736. Garfield Piktin & Eagle Cntys Go 5% Bond (365892MM7)	A	Interest	J	T	Buy	09/06/24	J		
737. University Colo Enterprise Sys 4%	A	Interest	J	T					
738. Fairfax Cnty VA 5% (30382AEV0)	A	Interest	K	T	Buy	09/09/24	K		
739. Houston Tex 5% (4423316D1)	A	Interest			Redeemed	03/01/24	J		
740. Richmond VA 5% (76541VSX6)	A	Interest			Redeemed	03/01/24	K		
741. Royal Oak Mich Hosp 5% (780486GS9)	A	Interest			Redeemed	03/01/24	K		
742. Texas St 5% (8827234G1)	A	Interest			Redeemed	04/01/24	J		
743. Tooele Cnty Utah Sch Dist 5% (890346LJ6)	A	Interest			Redeemed	06/03/24	J		
744. Provo Utah City Sch Dist 5% (744159QR8)	A	Interest			Redeemed	06/17/24	J		
745. Delaware Transn Auth 5% (246428G42)	A	Interest			Redeemed	07/01/24	K		
746. Maricopa Cnty Ariz Sch Dist 5% (567031TT6)	B	Interest			Redeemed	07/01/24	K		
747. Philadelphia PA Wtr & Waste 5% (717893ZC8)	A	Interest			Redeemed	07/01/24	K		
748. Wisconsin St Transn 5% (977123T73)	A	Interest			Redeemed	07/01/24	J		

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749. Ewing Twp NJ Sch Dist 5% (300569HE3)	A	Interest			Redeemed	07/15/24	J		
750. Iowa Fin Auth 5% (46246K5S7)	A	Interest			Redeemed	08/01/24	J		
751. Manor Tex Indpt Sch Dist 4% (564096WR2)	A	Interest			Redeemed	08/01/24	J		
752. New York NY 5% (64966MXU8)	B	Interest			Redeemed	08/01/24	K		
753. Washington St 5% (93974DWW4)	A	Interest			Redeemed	08/01/24	K		
754. Harris County Texas 5% (41423PBH9)	A	Interest			Redeemed	08/15/24	J		
755. Kyle Tex 5% (501552MJ9)	A	Interest			Redeemed	08/15/24	J		
756. Anchorage Alaska 5% (033161W30)	B	Interest			Redeemed	09/03/24	K		
757. Hidalgo Cnty Tex Drain Dist 5% (429335GW6)	A	Interest			Redeemed	09/03/24	K		
758. Miami Beach Fla Stormwater 5% (59324PDM8)	A	Interest			Redeemed	09/03/24	J		
759. Orange Cnty NC LTD 5% (684566BW1)	A	Interest			Redeemed	10/01/24	J		
760. Dallas Tex Area Rapid Tran 5% (235241QB5)	A	Interest			Redeemed	12/02/24	J		
761. Dublin Ohio City Sch Dis 4% (26371GVX5)	A	Interest			Redeemed	12/02/24	K		
762. Grant & Douglas Cntys Wash Sch 5% (387514BJ0)	A	Interest			Redeemed	12/02/24	J		
763. Pittsburgh PA Pub Pkg Auth 5% (725259MP7)	A	Interest			Redeemed	12/02/24	K		
764. Account #31 (H)									
765. GS FS Gov. MM Fund Mutual Fund (cash eq)	A	Dividend	J	T	Sold (part)	04/26/24	J		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
766.					Sold (part)	05/01/24	K		
767.					Buy (add'l)	06/27/24	J		
768.					Buy (add'l)	07/01/24	J		
769.					Sold (part)	07/29/24	J		
770.					Buy (add'l)	09/20/24	N		
771.					Sold (part)	09/24/24	N		
772.					Buy (add'l)	10/22/24	J		
773.					Sold (part)	10/29/24	J		
774.					Buy (add'l)	12/30/24	J		
775. Xtrackers MSCI Hedged Equity ETF (DBEF)	C	Dividend	M	T					
776. Wisdomtree EUR HDGD EQ FD CMN (HEDJ)	D	Dividend	M	T					
777. JPMorgan Structured Note Linked Basket Indices		None	N	T	Buy	09/17/24	N		
778. JP Morgan Chase & Co Structured Note Linked Basket Indices		None			Redeemed	09/19/24	N		
779. Account #32 (H)									
780. GS FS Gov. MM Fund Mutual Fund (cash eq)	A	Dividend	L	T	Buy (add'l)	03/04/24	J		
781.					Sold (part)	03/05/24	J		
782.					Buy (add'l)	03/12/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
783.					Buy (add'l)	03/18/24	J		
784.					Sold (part)	03/22/24	J		
785.					Buy (add'l)	03/27/24	J		
786.					Buy (add'l)	04/10/24	J		
787.					Buy (add'l)	04/11/24	K		
788.					Buy (add'l)	04/15/24	J		
789.					Sold (part)	04/17/24	K		
790.					Buy (add'l)	04/29/24	J		
791.					Buy (add'l)	04/30/24	K		
792.					Sold (part)	04/30/24	J		
793.					Sold (part)	05/01/24	K		
794.					Sold (part)	05/06/24	K		
795.					Buy (add'l)	05/08/24	J		
796.					Buy (add'l)	05/13/24	K		
797.					Sold (part)	05/16/24	J		
798.					Sold (part)	05/22/24	J		
799.					Buy (add'l)	05/29/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
800.					Sold (part)	05/31/24	K		
801.					Buy (add'l)	06/13/24	J		
802.					Buy (add'l)	06/20/24	K		
803.					Sold (part)	06/26/24	K		
804.					Buy (add'l)	06/28/24	K		
805.					Buy (add'l)	07/11/24	K		
806.					Sold (part)	07/12/24	J		
807.					Sold (part)	07/16/24	K		
808.					Buy (add'l)	07/19/24	K		
809.					Sold (part)	07/22/24	J		
810.					Buy (add'l)	07/23/24	J		
811.					Sold (part)	07/25/24	K		
812.					Buy (add'l)	07/26/24	J		
813.					Buy (add'l)	07/29/24	J		
814.					Buy (add'l)	07/31/24	J		
815.					Sold (part)	07/31/24	J		
816.					Sold (part)	08/01/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
817.					Sold (part)	08/05/24	J		
818.					Buy (add'l)	08/06/24	J		
819.					Buy (add'l)	08/12/24	K		
820.					Sold (part)	08/20/24	J		
821.					Buy (add'l)	08/22/24	J		
822.					Buy (add'l)	08/27/24	J		
823.					Buy (add'l)	09/06/24	J		
824.					Buy (add'l)	09/12/24	J		
825.					Buy (add'l)	09/17/24	J		
826.					Buy (add'l)	09/20/24	J		
827.					Buy (add'l)	09/23/24	J		
828.					Sold (part)	09/25/24	J		
829.					Sold (part)	10/03/24	J		
830.					Sold (part)	10/04/24	K		
831.					Buy (add'l)	10/08/24	J		
832.					Buy (add'l)	10/09/24	J		
833.					Sold (part)	10/15/24	K		

1. Income Gain Codes: (See Columns B1 and D4)
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C =$2,501 - $5,000
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E =$15,001 - $50,000
F =$50,001 - $100,000
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H1 =$1,000,001 - $5,000,000
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2. Value Codes (See Columns C1 and D3)
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L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
834.					Buy (add'l)	10/22/24	K		
835.					Sold (part)	10/23/24	K		
836.					Buy (add'l)	10/24/24	K		
837.					Buy (add'l)	10/29/24	L		
838.					Sold (part)	10/30/24	J		
839.					Sold (part)	10/31/24	K		
840.					Buy (add'l)	12/04/24	J		
841.					Sold (part)	12/09/24	K		
842.					Buy (add'l)	12/10/24	J		
843.					Sold (part)	12/13/24	K		
844.					Buy (add'l)	12/16/24	K		
845.					Sold (part)	12/19/24	K		
846.					Buy (add'l)	12/20/24	J		
847.					Buy (add'l)	12/23/24	J		
848.					Buy (add'l)	12/24/24	J		
849.					Buy (add'l)	12/27/24	J		
850.					Buy (add'l)	12/30/24	J		

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851.					Buy (add'l)	12/31/24	J		
852. Thomas H Lee Equity VIII Access LLC (9SI99JJW2)		None	M	T	Buy (add'l)	07/12/24	J		
853. LGP Equity Investors IX Access		None	L	T	Buy (add'l)	06/26/24	K		
854.					Buy (add'l)	11/14/24	K		
855. New Mountain Partners VI & Strategic Equity Access LLC		None	N	T	Buy (add'l)	03/22/24	J		
856.					Buy (add'l)	07/31/24	J		
857.					Buy (add'l)	09/25/24	J		
858.					Buy (add'l)	10/15/24	K		
859.					Sold (part)	12/04/24	J		
860. MD VIII PE Access LLC		None	M	T	Buy (add'l)	04/17/24	J		
861.					Sold (part)	07/12/24	J		
862.					Sold (part)	07/26/24	J		
863.					Sold (part)	08/12/24	K		
864.					Buy (add'l)	10/15/24	J		
865. Thomas H Lee Equity IX Access LLC		None	M	T					
866. CD&R XII Flagship Access LLC		None	L	T	Buy (add'l)	05/01/24	K		
867.					Sold (part)	10/09/24	J		

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868.					Buy (add'l)	10/30/24	K		
869. New Mountain Partners VII & St		None	J	T	Buy (add'l)	08/20/24	J		
870.					Buy (add'l)	11/01/24	K		
871.					Buy (add'l)	12/23/24	J		
872. GTCR XIV Access LLC		None	K	T	Buy	10/23/24	K		
873. Industry Ventures Direct II AC		None	N	T	Buy (add'l)	04/30/24	J		
874. Industry Ventures Direct III A		None	M	T	Buy (add'l)	04/17/24	K		
875.					Buy (add'l)	07/12/24	J		
876.					Buy (add'l)	12/13/24	K		
877. Menlo Special Opportunities III Access LLC		None	M	T	Buy (add'l)	06/26/24	J		
878.					Buy (add'l)	07/22/24	J		
879.					Buy (add'l)	10/31/24	K		
880.					Buy (add'l)	11/18/24	J		
881. LS Opportunities Access LLC		None	M	T	Buy (add'l)	03/05/24	J		
882.					Buy (add'l)	04/17/24	J		
883.					Buy (add'l)	05/31/24	K		
884.					Buy (add'l)	08/01/24	J		

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	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
885.					Buy (add'l)	10/04/24	K		
886.					Buy (add'l)	10/31/24	K		
887.					Buy (add'l)	12/19/24	K		
888. Vintage VII/West Street Capital Partners VII Access LP		None	N	T	Sold (part)	05/29/24	J		
889.					Sold (part)	06/13/24	J		
890.					Sold (part)	07/11/24	J		
891.					Buy (add'l)	07/26/24	J		
892.					Sold (part)	08/05/24	J		
893.					Sold (part)	09/12/24	J		
894.					Sold (part)	10/08/24	J		
895.					Sold (part)	11/26/24	J		
896. Private Equity Managers (2016) LP		None	N	T	Sold (part)	06/28/24	J		
897.					Sold (part)	08/27/24	J		
898.					Sold (part)	09/23/24	J		
899.					Sold (part)	12/27/24	J		
900. Vintage VIII/West Street Capit		None	N	T	Buy (add'l)	05/16/24	J		
901.					Sold (part)	07/11/24	J		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
902.					Buy (add'l)	08/05/24	J		
903.					Buy (add'l)	10/21/24	J		
904.					Sold (part)	11/18/24	J		
905.					Sold (part)	12/13/24	J		
906. DST Opportunities II Access LLC		None	L	T	Sold (part)	09/20/24	J		
907.					Sold (part)	11/01/24	J		
908.					Sold (part)	11/29/24	J		
909.					Sold (part)	12/24/24	J		
910. Insight Partners X Follow-On Access LP		None	K	T					
911. Insight Venture Partners X Access LP		None	N	T	Sold (part)	05/13/24	K		
912.					Sold (part)	08/01/24	J		
913.					Sold (part)	09/17/24	J		
914.					Sold (part)	10/30/24	J		
915.					Sold (part)	12/13/24	J		
916.					Sold (part)	12/31/24	J		
917. Viola Growth III Access LP		None	M	T	Sold (part)	11/25/24	K		
918. TCV XI Access LLC		None	L	T	Buy (add'l)	05/22/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
919. TPG Tech Adjacencies II Access		None	M	T	Buy (add'l)	05/06/24	K		
920.					Sold (part)	06/28/24	K		
921.					Buy (add'l)	08/05/24	J		
922.					Sold (part)	09/06/24	J		
923.					Buy (add'l)	10/03/24	J		
924.					Buy (add'l)	12/09/24	K		
925.					Sold (part)	12/23/24	J		
926.					Sold (part)	12/30/24	J		
927. TCV XII Access LLC		None	K	T	Buy (add'l)	04/30/24	J		
928.					Buy (add'l)	07/25/24	K		
929. Viola Growth IV Access LP		None	K	T	Buy (add'l)	07/16/24	K		
930. Monarch V Select Opportunities		None	M	T	Sold (part)	07/11/24	K		
931.					Sold (part)	08/22/24	J		
932.					Sold (part)	12/10/24	J		
933.					Sold (part)	12/20/24	J		
934. Account #33 (H)									
935. GS FS Gov. MM Fund Mutual Fund (cash eq.)	D	Dividend	M	T	Sold (part)	03/04/24	J		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
936.					Sold (part)	04/11/24	J		
937.					Sold (part)	04/30/24	L		
938.					Buy (add'l)	05/01/24	K		
939.					Sold (part)	06/20/24	K		
940.					Sold (part)	07/19/24	K		
941.					Sold (part)	07/23/24	J		
942.					Sold (part)	07/29/24	J		
943.					Sold (part)	07/31/24	J		
944.					Buy (add'l)	09/03/24	J		
945.					Sold (part)	09/24/24	J		
946.					Buy (add'l)	09/25/24	J		
947.					Sold (part)	10/15/24	J		
948.					Sold (part)	10/21/24	J		
949.					Sold (part)	10/22/24	K		
950.					Sold (part)	10/24/24	K		
951.					Sold (part)	10/29/24	L		
952.					Sold (part)	11/12/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
953.					Sold (part)	12/10/24	J		
954.					Sold (part)	12/16/24	K		
955. Account #34 (H)									
956. GS FS Gov. MM Fund Mutual Fund (cash eq.)	A	Dividend	J	T	Buy (add'l)	12/20/24	J		
957. Alphabet Inc. CMN Class A (GOOGL)	A	Dividend	M	T					
958. Alphabet Inc. CMN Class C (GOOG)	A	Dividend	K	T					
959. Amazon.com Inc Cmn (AMZN)		None	M	T					
960. American Express Co. CMN (AXP)	A	Dividend	J	T					
961. Apple Inc. CMN (AAPL)	A	Dividend	N	T					
962. Berkshire Hathaway Inc. Class B (BRKB)		None	L	T					
963. Microsoft Corporation CMN (MSFT)	B	Dividend	N	T					
964. Nvidia Corporation CMN (NVDA)	A	Dividend	N	T					
965. Account #35 (H)									
966. GS FS Gov. MM Fund Mutual Fund (cash eq.)	A	Dividend	J	T					
967. iShares Core S&P 500 ETF CMN (IVV)	B	Dividend	M	T					
968. Account #36 (H)									
969. GS FS Gov. MM Fund Mutual Fund (cash eq.)	C	Dividend	O	T	Buy	09/10/24	O		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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970. Account #37 (H)									
971. GS FS Gov. MM Fund Mutual Fund (cash eq.)	A	Dividend	J	T					
972. Alphabet Inc. Cmn Class A (GOOGL)	A	Dividend	M	T					
973. Amazon.com Inc Cmn (AMZN)		None	L	T					
974. American Express Co. CMN (AXP)	B	Dividend	M	T					
975. Apple Inc. CMN (AAPL)	A	Dividend	N	T					
976. Berkshire Hathaway Inc. Class B (BRKB)		None	M	T					
977. Microsoft Corporation CMN (MSFT)	B	Dividend	M	T					
978. ASML Holding (ASML) (Y)									
979. Intel Corporation (INTC) (Y)									
980. Palantir Technologies (PLTR) (Y)									
981. Account #38 (H)									
982. GS Financial Square Govt Fund (FGTXX) (cash eq.)	A	Dividend			Sold (part)	04/10/24	J		
983.					Sold	04/26/24	J		
984.					Buy	07/29/24	O		
985.					Sold	08/05/24	O		
986. 3M Company (MMM)	A	Dividend			Buy	03/15/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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987.					Sold	07/26/24	J		
988. Abbott Laboratories (ABT)	A	Dividend			Sold (part)	06/05/24	J		
989.					Sold	07/26/24	J		
990. Abbvie Inc (ABBV)	A	Dividend			Sold	07/26/24	J		
991. Adobe Inc (ADBE)		None			Sold	06/05/24	J		
992. Advanced Micro Devices (AMD)		None			Sold	07/26/24	J		
993. Air Products & Chemicals (APD)	A	Dividend			Buy	03/15/24	J		
994.					Sold	07/26/24	J		
995. Alexandria Real Estate Equities Inc (ARE)		None			Sold	03/15/24	J		
996. Align Technology (ALGN)		None			Buy	03/15/24	J		
997.					Sold	07/26/24	J		
998. Allstate Corp (ALL)	A	Dividend			Sold	07/26/24	J		
999. Alphabet Inc Cl A (GOOGL) (Y)									
1000. Altria Group (MO)	A	Dividend			Sold	07/26/24	J		
1001. Amazon.com Inc (AMZN)		None			Buy (add'l)	03/15/24	J		
1002.					Sold	06/05/24	J		
1003. American Electric Power (AEP)	A	Dividend			Sold	03/15/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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1004. American Express (AXP) (Y)									
1005. American Intl Group (AIG)	A	Dividend			Sold	07/26/24	J		
1006. American Tower Corp (AMT)	A	Dividend			Sold (part)	03/15/24	J		
1007.					Sold	07/26/24	J		
1008. American Water Works (AWK)		None			Sold	03/15/24	J		
1009. Ameriprise Financial (AMP)	A	Dividend			Sold	07/26/24	J		
1010. Amgen Inc (AMGN)	A	Dividend			Sold	07/26/24	J		
1011. Amphenol Corp (APH)	A	Dividend			Sold	07/26/24	J		
1012. Analog Devices Inc (ADI)	A	Dividend			Sold	07/26/24	J		
1013. Apple Inc (AAPL) (Y)									
1014. Applied Materials (AMAT)	A	Dividend			Sold	07/26/24	J		
1015. Arista Networks (ANET)		None			Sold	07/26/24	J		
1016. Arthur J Gallagher (AJG)	A	Dividend			Sold	07/26/24	J		
1017. Autodesk Inc (ADSK)		None			Buy	06/05/24	J		
1018.					Sold	07/26/24	J		
1019. Automatic Data Processing (ADP)	A	Dividend			Sold	07/26/24	J		
1020. Autozone Inc (AZO)		None			Sold	07/26/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1021. Avalonbay Communities (AVB)		None			Sold	07/26/24	J		
1022. Bank of America (BAC)	A	Dividend			Sold	07/26/24	J		
1023. Baxter International (BAX)	A	Dividend			Sold	07/26/24	J		
1024. Becton Dickinson and Co (BDX)	A	Dividend			Sold	07/26/24	J		
1025. Berkshire Hathaway (BRKB) (Y)									
1026. Bio-Rad Laboratories Inc (BIO)		None			Buy	03/15/24	J		
1027.					Sold	07/26/24	J		
1028. Biogen Inc (BIIB)		None			Sold	03/15/24	J		
1029.					Buy	06/05/24	J		
1030.					Sold	07/26/24	J		
1031. Blackrock Inc (BLK)	A	Dividend			Sold	07/26/24	J		
1032. Boeing Company (BA)		None			Sold	07/26/24	J		
1033. Booking Holdings Inc (BKNG)		None			Sold	07/26/24	J		
1034. Boston Scientific Corp (BSX)		None			Sold	07/26/24	J		
1035. Bristol Myers Squibb (BMY)		None			Buy	03/15/24	J		
1036. Broadcom Inc (AVGO)	A	Dividend			Sold	07/26/24	K		
1037. Brown Forman Corp (BFB)	A	Dividend			Buy	06/05/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1038.					Sold	07/26/24	J		
1039. Cadence Design Systems (CDNS)		None			Sold	07/26/24	J		
1040. Camden Property Trust (CPT)	A	Dividend			Sold	07/26/24	J		
1041. Capital One (COF)	A	Dividend			Sold	07/26/24	J		
1042. Carrier Global Corp (CARR)	A	Dividend			Sold	07/26/24	J		
1043. Caterpillar Inc (CAT)	A	Dividend			Sold	07/26/24	J		
1044. CBRE Group (CBRE)		None			Sold	07/26/24	J		
1045. CDW Corporation (CDW)	A	Dividend			Sold	07/26/24	J		
1046. Cencora Inc (COR)	A	Dividend			Sold	07/26/24	J		
1047. Centene Corporation (CNC)		None			Sold	07/26/24	J		
1048. Charles Schwab Corp (SCHW)	A	Dividend			Sold	07/26/24	J		
1049. Charter Communications (CHTR)		None			Buy	03/15/24	J		
1050.					Buy (add'l)	06/05/24	J		
1051.					Sold	07/26/24	J		
1052. Chevron Corp (CVX)	A	Dividend			Sold	07/26/24	J		
1053. Chipotle Mexican Grill (CMG)		None			Sold	07/26/24	J		
1054. Cigna Group (CI)		None			Sold	07/26/24	J		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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1055. Cintas Corporation (CTAS)	A	Dividend			Sold	07/26/24	J		
1056. Cisco Systems (CSCO)	A	Dividend			Sold	07/26/24	J		
1057. Citigroup Inc (C)	A	Dividend			Sold	07/26/24	J		
1058. Citizens Financial Group (CFG)	A	Dividend			Sold	07/26/24	J		
1059. CME Group Inc (CME)	A	Dividend			Sold	07/26/24	J		
1060. Coca Cola Co (KO)	A	Dividend			Sold	07/26/24	J		
1061. Colgate Palmolive (CL)	A	Dividend			Sold	07/26/24	J		
1062. Comcast Corp (CMCSA)		None			Buy	03/15/24	J		
1063.					Sold	06/05/24	J		
1064. Conocophillips Cmn (COP)	A	Dividend			Sold	07/26/24	J		
1065. Copart Inc (CPRT)		None			Sold	07/26/24	J		
1066. Costco Wholesale (COST)	A	Dividend			Sold	07/26/24	J		
1067. Crown Castle Intl Corp (CCI)		None			Sold	03/15/24	J		
1068. CSX Corporation (CSX)	A	Dividend			Sold	07/26/24	J		
1069. CVS Health Corp (CVS)	A	Dividend			Sold	07/26/24	J		
1070. DR Horton Inc (DHI)	A	Dividend			Sold	07/26/24	J		
1071. Danaher Corp (DHR)	A	Dividend			Sold	07/26/24	J		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1072. Deere & Co (DE)	A	Dividend			Sold	07/26/24	J		
1073. Dexcom Inc (DXCM) (Y)									
1074. Dominion Energy (D)	A	Dividend			Sold	07/26/24	J		
1075. Doordash Inc (DASH)		None			Sold	07/26/24	J		
1076. Dow Inc (DOW)	A	Dividend			Sold	07/26/24	J		
1077. Duke Energy Corp (DUK)	A	Dividend			Sold	07/26/24	J		
1078. Dupont De Nemours (DD)	A	Dividend			Sold	07/26/24	J		
1079. Elevance Health Inc (ELV)		None			Sold	07/26/24	J		
1080. Eli Lilly & Co (LLY)	A	Dividend			Sold	07/26/24	K		
1081. Emerson Electric (EMR)	A	Dividend			Sold	07/26/24	J		
1082. EOG Resources (EOG)	A	Dividend			Sold	07/26/24	J		
1083. Equifax Inc (EFX)	A	Dividend			Sold	07/26/24	J		
1084. Equinix Inc (EQIX)	A	Dividend			Sold	07/26/24	J		
1085. Estee Lauder Cos (EL)		None			Sold	06/05/24	J		
1086. Eversource Energy (ES)	A	Dividend			Buy	03/15/24	J		
1087.					Sold	07/26/24	J		
1088. Exelon Corp (EXC)	A	Dividend			Sold	07/26/24	J		

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1089. Exxon Mobil Corp (XOM)	A	Dividend			Sold	07/26/24	J		
1090. Fedex Corp (FDX)	A	Dividend			Sold	07/26/24	J		
1091. Fidelity Natl Info (FIS)	A	Dividend			Sold	07/26/24	J		
1092. Fiserv Inc (FI)		None			Sold	07/26/24	J		
1093. FMC Corporation (FMC)	A	Dividend			Buy	06/05/24	J		
1094.					Sold	07/26/24	J		
1095. Ford Motor Co (F)	A	Dividend			Buy (add'l)	06/05/24	J		
1096.					Sold	07/26/24	J		
1097. Fortinet Inc (FTNT)		None			Sold	07/26/24	J		
1098. Freeport McMoran Inc (FCX)	A	Dividend			Sold	07/26/24	J		
1099. GE Aerospace (GE)		None			Sold	07/26/24	J		
1100. GE Vernova LLC (GEV)		None			Sold	07/26/24	J		
1101. General Dynamics Corp (GD)	A	Dividend			Sold	07/26/24	J		
1102. General Mills Inc (GIS)	A	Dividend			Sold	07/26/24	J		
1103. Gilead Sciences (GILD)	A	Dividend			Sold	07/26/24	J		
1104. Halliburton Co (HAL)	A	Dividend			Sold	07/26/24	J		
1105. HCA Healthcare Inc (HCA)	A	Dividend			Sold	07/26/24	J		

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1106. Hilton Worldwide (HLT)	A	Dividend			Sold	07/26/24	J		
1107. Honeywell Intl (HON)	A	Dividend			Sold	07/26/24	J		
1108. HP Inc (HPQ)		None			Sold	07/26/24	J		
1109. Idexx Laboratories (IDXX)		None			Sold	07/26/24	J		
1110. Illinois Tool Works (ITW)	A	Dividend			Sold	07/26/24	J		
1111. Illumina Inc (ILMN)		None			Buy	06/05/24	J		
1112. Insulet Corp (PODD)		None			Buy	06/05/24	J		
1113.					Sold	07/26/24	J		
1114. Intel Corp (INTC)	A	Dividend			Sold	07/26/24	J		
1115. Intercontinental Exchange Inc (ICE)		None			Sold	07/26/24	J		
1116. Intl Business Machines (IBM)	A	Dividend			Sold	07/26/24	J		
1117. Intuit Inc (INTU)	A	Dividend			Sold	07/26/24	J		
1118. Intuitive Surgical Inc (ISRG)		None			Sold	07/26/24	J		
1119. Iqvia Holdings Inc (IQV)		None			Sold	07/26/24	J		
1120. Johnson & Johnson (JNJ)	A	Dividend			Sold (part)	06/05/24	J		
1121.					Sold	07/26/24	J		
1122. JPMorgan & Chase (JPM)	A	Dividend			Sold	07/26/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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1123. KLA Corp (KLAC)	A	Dividend			Sold	07/26/24	J		
1124. Kroger Company (KR)	A	Dividend			Sold	07/26/24	J		
1125. L3Harris Technologies (LHX)	A	Dividend			Sold	07/26/24	J		
1126. Lam Research Corp (LRCX)	A	Dividend			Sold	07/26/24	J		
1127. Live Nation Entertainment (LYV)		None			Sold	07/26/24	J		
1128. Lockheed Martin Corp (LMT)	A	Dividend			Sold	07/26/24	J		
1129. Lowes Companies Inc (LOW)	A	Dividend			Sold	07/26/24	J		
1130. Lululemon Athletica (LULU)		None			Buy	06/05/24	J		
1131.					Sold	07/26/24	J		
1132. Marathon Petroleum Corp (MPC)	A	Dividend			Sold	07/26/24	J		
1133. Marketaxess Holdings (MKTX)	A	Dividend			Sold	07/26/24	J		
1134. Marriott International Inc (MAR)	A	Dividend			Sold	07/26/24	J		
1135. Marsh & McLennan Co (MMC)	A	Dividend			Sold	07/26/24	J		
1136. Mastercard Inc (MA)	A	Dividend			Sold	07/26/24	J		
1137. McDonalds Corp (MCD)	A	Dividend			Sold	07/26/24	J		
1138. McKesson Corp (MCK)	A	Dividend			Sold	07/26/24	J		
1139. Merck & Co (MRK)	A	Dividend			Sold	07/26/24	J		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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1140. Meta Platforms Inc (META)	A	Dividend			Buy (add'l)	03/15/24	J		
1141.					Sold (part)	06/05/24	J		
1142.					Sold	07/26/24	K		
1143. Metlife Inc (MET)	A	Dividend			Sold	07/26/24	J		
1144. Mettler-Toledo Intl (MTD)		None			Sold	07/26/24	J		
1145. Microchip Technology (MCHP)	A	Dividend			Sold	07/26/24	J		
1146. Micron Technology (MU)	A	Dividend			Sold	07/26/24	J		
1147. Microsoft Corp (MSFT) (Y)									
1148. Moderna Inc (MRNA)		None			Sold	07/26/24	J		
1149. Mondelez International Inc (MDLZ)	A	Dividend			Sold	07/26/24	J		
1150. Moody's Corp (MCO)	A	Dividend			Sold	07/26/24	J		
1151. Morgan Stanley (MS)	A	Dividend			Sold	07/26/24	J		
1152. Motorola Solutions Inc (MSI)		None			Sold	07/26/24	J		
1153. MSCI Inc (MSCI)	A	Dividend			Sold	07/26/24	J		
1154. Netflix Inc (NFLX)		None			Sold	07/26/24	J		
1155. Newmont Corp (NEM)	A	Dividend			Buy	03/15/24	J		
1156.					Sold	07/26/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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1157. Nextera Energy (NEE)	A	Dividend			Buy	03/15/24	J		
1158.					Sold	07/26/24	J		
1159. Nike Cl B (NKE)	A	Dividend			Sold	03/15/24	J		
1160.					Buy	06/05/24	J		
1161.					Sold	07/26/24	J		
1162. Norfolk Southern Corp (NSC)		None			Sold	06/05/24	J		
1163. Nvidia Corp (NVDA) (Y)									
1164. O'Reilly Automotive Inc (ORLY)		None			Sold	07/26/24	J		
1165. Occidental Petroleum Corp (OXY)	A	Dividend			Sold	07/26/24	J		
1166. Oneok Inc (OKE)	A	Dividend			Sold	07/26/24	J		
1167. Oracle Corp (ORCL)	A	Dividend			Sold	07/26/24	J		
1168. Parker-Hannifin Corp (PH)	A	Dividend			Sold	07/26/24	J		
1169. Paychex Corp (PH)	A	Dividend			Sold	07/26/24	J		
1170. Pepsico Inc (PEP)	A	Dividend			Sold	07/26/24	J		
1171. Pfizer Inc (PFE)	A	Dividend			Buy	03/15/24	J		
1172.					Sold	07/26/24	J		
1173. Philip Morris Intl (PM)	A	Dividend			Sold	07/26/24	J		

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1174. Phillips 66 (PSX)	A	Dividend			Sold	07/26/24	J		
1175. PNC Financial Services Group (PNC)	A	Dividend			Sold	07/26/24	J		
1176. Procter & Gamble Co (PG)	A	Dividend			Sold	07/26/24	J		
1177. Prologis Inc (PLD)	A	Dividend			Buy	06/05/24	J		
1178.					Sold	07/26/24	J		
1179. Prudential Financial Inc (PRU)	A	Dividend			Sold	07/26/24	J		
1180. Public Svc Enterprise Group (PEG)	A	Dividend			Sold	07/26/24	J		
1181. Pulte Group Inc (PHM)	A	Dividend			Sold	07/26/24	J		
1182. Qualcomm Inc (QCOM)	A	Dividend			Sold	07/26/24	J		
1183. Quanta Services (PWR)	A	Dividend			Sold	07/26/24	J		
1184. Regeneron Pharmaceutical (REGN)		None			Sold	07/26/24	J		
1185. Ross Stores Inc (ROST)	A	Dividend			Sold	07/26/24	J		
1186. RTX Corp (RTX)	A	Dividend			Sold	07/26/24	J		
1187. SBA Communications (SBAC)		None			Sold	03/15/24	J		
1188. S&P Global Inc (SPGI)		None			Sold	07/26/24	J		
1189. Salesforce Inc (CRM)	A	Dividend			Buy (add'l)	06/05/24	J		
1190.					Sold	07/26/24	J		

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1191. Sempra Energy (SRE)	A	Dividend			Sold	07/26/24	J		
1192. Servicenow Inc (NOW)		None			Sold	07/26/24	J		
1193. Sherwin Williams Co (SHW)	A	Dividend			Sold	07/26/24	J		
1194. Starbucks Corp (SBUX)	A	Dividend			Sold	07/26/24	J		
1195. Stryker Corp (SYK)	A	Dividend			Sold	07/26/24	J		
1196. Synopsys Inc (SNPS)		None			Sold	07/26/24	J		
1197. T Mobile US (TMUS)	A	Dividend			Sold	07/26/24	J		
1198. Target Corp (TGT) (Y)									
1199. Teleflex Inc (TFX)	A	Dividend			Sold	03/15/24	J		
1200.					Buy	06/05/24	J		
1201.					Sold	07/26/24	J		
1202. Tesla Inc (TSLA)		None			Sold (part)	03/15/24	J		
1203.					Sold	07/26/24	J		
1204. Texas Instruments (TXN)	A	Dividend			Sold	07/26/24	J		
1205. The Bank of NY Mellon Corp (BK)	A	Dividend			Sold	07/26/24	J		
1206. The Progressive Corp (PGR)	A	Dividend			Sold	07/26/24	J		
1207. The Southern Co (SO)	A	Dividend			Sold	07/26/24	J		

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1208. The Travelers Co (TRV)	A	Dividend			Sold	07/26/24	J		
1209. The Williams Companies Inc (WMB)	A	Dividend			Sold	07/26/24	J		
1210. Thermo Fisher Scientific (TMO)	A	Dividend			Sold	07/26/24	J		
1211. TJX Companies Inc (TJX)	A	Dividend			Sold	07/26/24	J		
1212. Tractor Supply Co (TSCO)	A	Dividend			Sold	07/26/24	J		
1213. Transdigm Group Inc (TDG)		None			Sold	07/26/24	J		
1214. US Bancorp (USB) (Y)									
1215. Uber Technologies (UBER)		None			Sold	07/26/24	J		
1216. Union Pacific Corp (UNP)	A	Dividend			Sold	07/26/24	J		
1217. Unitedhealth Group (UNH)	A	Dividend			Sold	07/26/24	J		
1218. United Parcel Service (UPS)		None			Sold	03/15/24	J		
1219. Verisk Analytics (VRSK)	A	Dividend			Sold	07/26/24	J		
1220. Verizon Communications (VZ)	A	Dividend			Sold	07/26/24	J		
1221. Vertex Pharmaceuticals (VRTX)	A	Dividend			Sold	07/26/24	J		
1222. VF Corp (VFC)		None			Buy	03/15/24	J		
1223.					Sold	06/05/24	J		
1224. Visa Inc (V)	A	Dividend			Sold	07/26/24	J		

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1225. Vulcan Materials Co (VMC)	A	Dividend			Sold	07/26/24	J		
1226. WW Grainger Inc (GWW) (Y)									
1227. Walmart Inc (WMT)	A	Dividend			Sold	07/26/24	J		
1228. Walt Disney Co (DIS)	A	Dividend			Sold	07/26/24	J		
1229. WEC Energy Group (WEC)		None			Sold	03/15/24	J		
1230. Wells Fargo & Co (WFC)	A	Dividend			Sold	07/26/24	J		
1231. Welltower Inc (WELL)	A	Dividend			Sold	07/26/24	J		
1232. Zimmer Biomet (ZBH)	A	Dividend			Sold	07/26/24	J		
1233. The Home Depot (HD)	A	Dividend			Sold	07/26/24	J		
1234. Schlumberger Ltd (SLB) (Y)									
1235. Healthpeak LLC (DOC)		None			Buy	03/15/24	J		
1236.					Sold	07/26/24	J		
1237. Public Storage (PSA)	A	Dividend			Sold	07/26/24	J		
1238. Simon Property Group (SPG)	A	Dividend			Sold	07/26/24	J		
1239. Weyerhaeuser Co (WY) (Y)									
1240. Accenture PLC (ACN)	A	Dividend			Sold	07/26/24	J		
1241. Aon Public Ltd Co (AON)	A	Dividend			Sold	07/26/24	J		

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1242. Chubb Ltd (CB)	A	Dividend			Sold	07/26/24	J		
1243. Eaton Corp (ETN)	A	Dividend			Sold	07/26/24	J		
1244. Johnson Controls Intl (JCI)	A	Dividend			Sold	07/26/24	J		
1245. Linde PLC (LIN)	A	Dividend			Sold	07/26/24	J		
1246. Lyondellbell Industries (LYB) (Y)									
1247. Spotify Technologies (SPOT)		None			Sold	07/26/24	J		
1248. TE Connectivity (TEL)		None			Sold	07/26/24	J		
1249. Trane Technologies (TT)		None			Sold	07/26/24	J		
1250. Waste Connections Inc (WCN)	A	Dividend			Sold	07/26/24	J		
1251. Humana Inc (HUM)		None			Sold	03/15/24	J		
1252. Illumina Inc (ILMN)		None			Sold	03/15/24	J		
1253. Xcel Energy Inc (XEL)		None			Sold	03/15/24	J		
1254. Account #39 (H)									
1255. GS Financial Square Govt Fund (FGTXX) (cash eq.)	A	Dividend			Sold (part)	04/26/24	J		
1256.					Sold (part)	07/11/24	J		
1257.					Buy (add'l)	07/29/24	O		
1258.					Sold	08/05/24	O		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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1259. 3M Company (MMM)	A	Dividend			Sold	07/26/24	J		
1260. Abbott Laboratories (ABT)	A	Dividend			Sold (part)	07/10/24	J		
1261.					Sold	07/26/24	J		
1262. Abbvie Inc (ABBV)	A	Dividend			Sold	07/26/24	J		
1263. Adobe Inc (ADBE)		None			Sold	07/26/24	J		
1264. Advanced Micro Devices (AMD)		None			Sold	07/26/24	J		
1265. Airbnb Inc (ABNB)		None			Sold	07/26/24	J		
1266. Align Technology (ALGN)		None			Buy	07/10/24	J		
1267.					Sold	07/26/24	J		
1268. Allstate Corp (ALL)	A	Dividend			Sold	07/26/24	J		
1269. Alphabet Inc Cl A (GOOGL) (Y)									
1270. Altria Group (MO)	A	Dividend			Sold	07/26/24	J		
1271. Amazon.com Inc (AMZN)		None			Buy (add'l)	07/10/24	J		
1272. American Express (AXP) (Y)									
1273. American Intl Group (AIG)	A	Dividend			Sold	07/26/24	J		
1274. Ameriprise Financial (AMP)	A	Dividend			Sold	07/26/24	J		
1275. Amgen Inc (AMGN)	A	Dividend			Sold	07/26/24	J		

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1276. Amphenol Corp (APH)	A	Dividend			Sold	07/26/24	J		
1277. Analog Devices Inc (ADI)	A	Dividend			Sold	07/26/24	J		
1278. Apple Inc (AAPL) (Y)									
1279. Applied Materials (AMAT)	A	Dividend			Sold	07/26/24	J		
1280. Arista Networks (ANET)		None			Sold	07/26/24	J		
1281. Arthur J Gallagher (AJG)	A	Dividend			Sold	07/26/24	J		
1282. AT&T Inc (T)	A	Dividend			Sold	07/26/24	J		
1283. Autodesk Inc (ADSK)		None			Buy	07/10/24	J		
1284.					Sold	07/26/24	J		
1285. Automatic Data Processing (ADP)	A	Dividend			Sold	07/26/24	J		
1286. Avalonbay Communities Inc (AVB)		None			Sold	07/26/24	J		
1287. Bank of America (BAC)	A	Dividend			Sold	07/26/24	J		
1288. Baxter International Inc (BAX)	A	Dividend			Sold	07/10/24	J		
1289. Becton Dickinson and Co (BDX)	A	Dividend			Sold	07/26/24	J		
1290. Berkshire Hathaway (BRKB) (Y)									
1291. Biogen Inc (BIIB)		None			Buy	07/10/24	J		
1292.					Sold	07/26/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period: (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period: (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period: (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1293. Blackrock Inc (BLK)	A	Dividend			Sold	07/26/24	J		
1294. Blackstone Group (BLK)	A	Dividend			Sold	07/26/24	J		
1295. Boeing Company (BA)		None			Sold	07/26/24	J		
1296. Booking Holdings Inc (BKNG)		None			Sold	07/26/24	J		
1297. Boston Scientific Corp (BSX)		None			Sold	07/26/24	J		
1298. Bristol Myers Squibb (BMY)		None			Buy	07/10/24	J		
1299.					Sold	07/26/24	J		
1300. Broadcom Inc (AVGO)	A	Dividend			Sold	07/26/24	J		
1301. Broadridge Financial Solutions (BR)	A	Dividend			Sold	07/26/24	J		
1302. Cadence Design Systems (CDNS)		None			Sold	07/26/24	J		
1303. Capital One (COF)	A	Dividend			Sold	07/26/24	J		
1304. Carrier Global Corp (CARR)	A	Dividend			Sold	07/26/24	J		
1305. Caterpillar Inc (CAT)	A	Dividend			Sold	07/26/24	J		
1306. CBRE Group Inc (CBRE)		None			Sold	07/26/24	J		
1307. CDW Corporation (CDW)	A	Dividend			Sold	07/26/24	J		
1308. Cencora Inc (COR)	A	Dividend			Sold	07/26/24	J		
1309. Centene Corporation (CNC) (Y)									

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1310. Charles Riv Labs Intl (CRL)		None			Sold	07/26/24	J		
1311. Charles Schwab Corp (SCHW)	A	Dividend			Sold	07/26/24	J		
1312. Charter Communications (CHTR)		None			Sold	07/26/24	J		
1313. Chevron Corp (CVX)	A	Dividend			Sold	07/26/24	J		
1314. Chipotle Mexican Grill (CMG)		None			Sold	07/26/24	J		
1315. Cigna Group (CI)		None			Sold	07/26/24	J		
1316. Cintas Corporation (CTAS)	A	Dividend			Sold	07/26/24	J		
1317. Cisco Systems (CSCO)	A	Dividend			Sold	07/26/24	J		
1318. Citigroup Inc (C)	A	Dividend			Sold	07/26/24	J		
1319. Clorox Co (CLX)	A	Dividend			Sold	07/10/24	J		
1320. CME Group Inc (CME)	A	Dividend			Sold	07/26/24	J		
1321. Coca Cola Co (KO)	A	Dividend			Sold	07/26/24	J		
1322. Comcast Corp (CMCSA)	A	Dividend			Sold	07/10/24	J		
1323. Conocophillips Cmn (COP)	A	Dividend			Sold	07/26/24	J		
1324. Copart Inc (CPRT)		None			Sold	07/26/24	J		
1325. Costco Wholesale (COST)	A	Dividend			Sold	07/26/24	J		
1326. CSX Corporation (CSX)	A	Dividend			Sold	07/26/24	J		

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1327. CVS Health Corp (CVS)	A	Dividend			Sold	07/26/24	J		
1328. DR Horton Inc (DHI)	A	Dividend			Sold	07/26/24	J		
1329. Danaher Corp (DHR)	A	Dividend			Sold	07/26/24	J		
1330. Deere & Co (DE)	A	Dividend			Sold	07/26/24	J		
1331. Dexcom Inc (DXCM) (Y)									
1332. Dollar General (DG)	A	Dividend			Sold	07/10/24	J		
1333. Dominion Energy (D)	A	Dividend			Sold	07/26/24	J		
1334. Dow Inc (DOW)	A	Dividend			Sold	07/26/24	J		
1335. Duke Energy Corp (DUK)	A	Dividend			Sold	07/26/24	J		
1336. Dupont De Nemours (DD)	A	Dividend			Sold	07/26/24	J		
1337. Eastman Chemical Co (EMN)	A	Dividend			Sold	07/26/24	J		
1338. Elevance Health Inc (ELV)		None			Sold	07/26/24	J		
1339. Eli Lilly & Co (LLY)	A	Dividend			Sold	07/26/24	K		
1340. Emerson Electric (EMR)	A	Dividend			Sold	07/26/24	J		
1341. EOG Resources (EOG)	A	Dividend			Sold	07/26/24	J		
1342. EPAM Systems Inc (EPAM)		None			Sold	07/26/24	J		
1343. Equifax Inc (EFX)	A	Dividend			Sold	07/26/24	J		

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1344. Estee Lauder (EL)		None			Buy	07/10/24	J		
1345.					Sold	07/26/24	J		
1346. Eversource Energy (ES)		None			Buy	07/10/24	J		
1347.					Sold	07/26/24	J		
1348. Exxon Mobil Corp (XOM)	A	Dividend			Sold	07/26/24	J		
1349. Fedex Corp (FDX)	A	Dividend			Sold	07/26/24	J		
1350. Fidelity Natl Info (FIS)	A	Dividend			Sold	07/26/24	J		
1351. Fiserv Inc (FI)		None			Sold	07/26/24	J		
1352. Ford Motor Co (F)	A	Dividend			Sold	07/26/24	J		
1353. Fortinet Inc (FTNT)		None			Sold	07/26/24	J		
1354. Freeport McMoran Inc (FCX)	A	Dividend			Sold	07/26/24	J		
1355. GE Aerospace (GE)		None			Sold	07/26/24	J		
1356. GE Healthcare Tech (GEHC) (Y)									
1357. GE Vernova LLC (GEV)		None			Sold	07/26/24	J		
1358. General Dynamics Corp (GD)	A	Dividend			Sold	07/26/24	J		
1359. General Mills Inc (GIS)	A	Dividend			Sold	07/26/24	J		
1360. Gilead Sciences (GILD)	A	Dividend			Sold	07/26/24	J		

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1361. Halliburton Co (HAL)	A	Dividend			Sold	07/26/24	J		
1362. HCA Healthcare Inc (HCA)	A	Dividend			Sold	07/26/24	J		
1363. Hilton Worldwide (HLT)	A	Dividend			Sold	07/26/24	J		
1364. Honeywell Intl (HON)	A	Dividend			Sold	07/26/24	J		
1365. HP Inc (HPQ)		None			Sold	07/26/24	J		
1366. Humana Inc (HUM) (Y)									
1367. Idexx Laboratories (IDXX) (Y)									
1368. Illinois Tool Works (ITW)	A	Dividend			Sold	07/26/24	J		
1369. Intel Corp (INTC)	A	Dividend			Sold	07/26/24	J		
1370. Intercontinental Exchange Inc (ICE)		None			Sold	07/26/24	J		
1371. Intl Business Machines (IBM)	A	Dividend			Sold	07/26/24	J		
1372. Intuit Inc (INTU)	A	Dividend			Sold	07/26/24	J		
1373. Intuitive Surgical Inc (ISRG)		None			Sold	07/26/24	J		
1374. Iqvia Holdings Inc (IQV)		None			Sold	07/26/24	J		
1375. Johnson & Johnson (JNJ)	A	Dividend			Sold (part)	07/10/24	J		
1376.					Sold	07/26/24	J		
1377. Johnson Controls Intl (JCI)		None			Sold	07/26/24	J		

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1378. JPMorgan & Chase (JPM)	A	Dividend			Sold	07/26/24	J		
1379. Kenvue Inc (KVUE) (Y)									
1380. Keurig Dr Pepper Inc (KDP) (Y)									
1381. KLA Corp (KLAC)	A	Dividend			Sold	07/26/24	J		
1382. Kroger Company (KR)	A	Dividend			Sold	07/26/24	J		
1383. L3Harris Technologies (LHX)	A	Dividend			Sold	07/26/24	J		
1384. Lam Research Corp (LRCX)	A	Dividend			Sold	07/26/24	J		
1385. Lockheed Martin Corp (LMT)	A	Dividend			Sold	07/26/24	J		
1386. Lowes Companies Inc (LOW)	A	Dividend			Sold	07/26/24	J		
1387. Lululemon Athletica (LULU)		None			Sold	07/26/24	J		
1388. Marathon Petroleum Corp (MPC)	A	Dividend			Sold	07/26/24	J		
1389. Marriott International Inc (MAR)	A	Dividend			Sold	07/26/24	J		
1390. Marsh & McLennan Co (MMC)	A	Dividend			Sold	07/26/24	J		
1391. Mastercard Inc (MA)	A	Dividend			Sold	07/26/24	J		
1392. McDonalds Corp (MCD)	A	Dividend			Sold	07/26/24	J		
1393. McKesson Corp (MCK)	A	Dividend			Sold	07/26/24	J		
1394. Merck & Co (MRK)	A	Dividend			Sold	07/26/24	J		

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1395. Meta Platforms Inc (META)	A	Dividend			Sold	07/26/24	K		
1396. Metlife Inc (MET)	A	Dividend			Sold	07/26/24	J		
1397. Mettler-Toledo Intl (MTD)		None			Sold	07/26/24	J		
1398. Microchip Technology (MCHP)	A	Dividend			Sold	07/26/24	J		
1399. Micron Technology (MU)	A	Dividend			Sold	07/26/24	J		
1400. Microsoft Corp (MSFT) (Y)									
1401. Moderna Inc (MRNA) (Y)									
1402. Monster Beverage Corp (MNST) (Y)									
1403. Moody's Corp (MCO)	A	Dividend			Sold	07/26/24	J		
1404. Morgan Stanley (MS)	A	Dividend			Sold	07/26/24	J		
1405. Motorola Solutions Inc (MSI)		None			Sold	07/26/24	J		
1406. MSCI Inc (MSCI)	A	Dividend			Sold	07/26/24	J		
1407. Netflix Inc (NFLX)		None			Sold	07/26/24	J		
1408. Newmont Corp (NEM)	A	Dividend			Sold	07/26/24	J		
1409. Nextera Energy (NEE)	A	Dividend			Sold	07/26/24	J		
1410. Nike Cl B (NKE)	A	Dividend			Sold	07/10/24	J		
1411. Norfolk Southern Corp (NSC)	A	Dividend			Sold	07/10/24	J		

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1412. Northrop Grumman (NOC) (Y)									
1413. Nvidia Corp (NVDA) (Y)									
1414. O'Reilly Automotive Inc (ORLY)		None			Sold	07/26/24	J		
1415. Occidental Petroleum Corp (OXY)	A	Dividend			Sold	07/26/24	J		
1416. Oneok Inc (OKE)	A	Dividend			Sold	07/26/24	J		
1417. Oracle Corp (ORCL)	A	Dividend			Sold	07/26/24	J		
1418. Paccar Inc (PCAR)	A	Dividend			Sold	07/26/24	J		
1419. Palo Alto Networks (PANW)		None			Sold	07/26/24	J		
1420. Parker-Hannifin Corp (PH)	A	Dividend			Sold	07/26/24	J		
1421. Paychex Corp (PH)	A	Dividend			Sold	07/26/24	J		
1422. Paypal Holdings (PYPL)		None			Buy	07/10/24	J		
1423.					Sold	07/26/24	J		
1424. Pepsico Inc (PEP)	A	Dividend			Sold	07/26/24	J		
1425. Pfizer Inc (PFE)	A	Dividend			Sold	07/10/24	J		
1426. Philip Morris Intl (PM)	A	Dividend			Sold	07/26/24	J		
1427. Phillips 66 (PSX)	A	Dividend			Sold	07/26/24	J		
1428. PNC Financial Services Group (PNC)	A	Dividend			Sold	07/26/24	J		

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1429. Procter & Gamble Co (PG)	A	Dividend			Sold	07/26/24	J		
1430. Prudential Financial Inc (PRU)	A	Dividend			Sold	07/26/24	J		
1431. Public Svc Enterprise Group (PEG)	A	Dividend			Sold	07/26/24	J		
1432. Pulte Group Inc (PHM)	A	Dividend			Sold	07/26/24	J		
1433. Qualcomm Inc (QCOM)	A	Dividend			Sold	07/26/24	J		
1434. Quanta Services (PWR)	A	Dividend			Sold	07/26/24	J		
1435. Regeneron Pharmaceutical (REGN)		None			Sold	07/26/24	J		
1436. Ross Stores Inc (ROST)	A	Dividend			Sold	07/26/24	J		
1437. RTX Corp (RTX)	A	Dividend			Sold	07/26/24	J		
1438. S&P Global Inc (SPGI)		None			Sold	07/26/24	J		
1439. Salesforce Inc (CRM)	A	Dividend			Sold	07/26/24	J		
1440. SBA Communications Corp (SBAC)		None			Sold	07/26/24	J		
1441. Sempra Energy (SRE)	A	Dividend			Sold	07/26/24	J		
1442. Servicenow Inc (NOW)		None			Sold	07/26/24	J		
1443. Sherwin Williams Co (SHW)	A	Dividend			Sold	07/26/24	J		
1444. Starbucks Corp (SBUX)	A	Dividend			Sold	07/26/24	J		
1445. Stryker Corp (SYK)	A	Dividend			Sold	07/26/24	J		

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1446. Synopsys Inc (SNPS)		None			Sold	07/26/24	J		
1447. Sysco Corp (SYY)	A	Dividend			Sold	07/26/24	J		
1448. T Mobile US (TMUS)	A	Dividend			Sold	07/26/24	J		
1449. Target Corp (TGT)	A	Dividend			Sold	07/26/24	J		
1450. Teleflex Inc (TFX)	A	Dividend			Sold	07/10/24	J		
1451. Tesla Inc (TSLA)		None			Sold	07/26/24	J		
1452. Texas Instruments (TXN)	A	Dividend			Sold	07/26/24	J		
1453. The Bank of NY Mellon Corp (BK)	A	Dividend			Sold	07/26/24	J		
1454. The Progressive Corp (PGR)	A	Dividend			Sold	07/26/24	J		
1455. The Southern Co (SO)	A	Dividend			Sold	07/26/24	J		
1456. The Travelers Co (TRV)	A	Dividend			Sold	07/26/24	J		
1457. The Williams Companies (WMB)	A	Dividend			Sold	07/26/24	J		
1458. Thermo Fisher Scientific (TMO)	A	Dividend			Sold	07/26/24	J		
1459. TJX Companies Inc (TJX)	A	Dividend			Sold	07/26/24	J		
1460. Tractor Supply Co (TSCO)	A	Dividend			Sold	07/26/24	J		
1461. Transdigm Group Inc (TDG)		None			Sold	07/26/24	J		
1462. Uber Technologies (UBER)		None			Buy	07/10/24	J		

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1463.					Sold	07/26/24	J		
1464. Union Pacific Corp (UNP)	A	Dividend			Sold	07/26/24	J		
1465. Unitedhealth Group (UNH)	A	Dividend			Sold	07/26/24	J		
1466. United Parcel Service (UPS)	A	Dividend			Buy	07/10/24	J		
1467.					Sold	07/26/24	J		
1468. Verizon Communications (VZ)	A	Dividend			Sold	07/26/24	J		
1469. Vertex Pharmaceuticals (VRTX)		None			Sold	07/26/24	J		
1470. Visa Inc (V)	A	Dividend			Sold	07/26/24	J		
1471. Vulcan Materials Co (VMC)	A	Dividend			Sold	07/26/24	J		
1472. WW Grainger Inc (GWW) (Y)									
1473. Walmart Inc (WMT)	A	Dividend			Sold	07/26/24	J		
1474. Walt Disney Co (DIS)	A	Dividend			Sold	07/26/24	J		
1475. Wells Fargo & Co (WFC)	A	Dividend			Sold	07/26/24	J		
1476. Welltower Inc (WELL)	A	Dividend			Sold	07/26/24	J		
1477. Wex Inc (WEX) (Y)									
1478. Xcel Energy Inc (XEL)	A	Dividend			Sold	07/26/24	J		
1479. The Home Depot (HD)	A	Dividend			Sold	07/26/24	J		

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1480. Schlumberger Ltd (SLB) (Y)									
1481. Alexandria Real Estate Eq (ARE)	A	Dividend			Sold	07/26/24	J		
1482. American Tower Corp (AMT)	A	Dividend			Sold	07/10/24	J		
1483. Boston Properties Inc (BXP)	A	Dividend			Sold	07/26/24	J		
1484. Crown Castle Inc (CCI)	A	Dividend			Sold	07/26/24	J		
1485. Equinix Inc (EQIX)		None			Sold	07/26/24	J		
1486. Prologis Inc (PLD)	A	Dividend			Sold (part)	07/10/24	J		
1487.					Sold	07/26/24	J		
1488. Public Storage (PSA)	A	Dividend			Sold	07/26/24	J		
1489. Simon Property Group (SPG)	A	Dividend			Sold	07/26/24	J		
1490. Accenture PLC (ACN)	A	Dividend			Sold	07/26/24	J		
1491. Aon Public Ltd Co (AON)	A	Dividend			Sold	07/26/24	J		
1492. Chubb Ltd (CB)	A	Dividend			Sold	07/26/24	J		
1493. Eaton Corp (ETN)	A	Dividend			Sold	07/26/24	J		
1494. Linde PLC (LIN)	A	Dividend			Sold	07/26/24	J		
1495. Lyondellbell Industries (LYB) (Y)									
1496. NXP Semiconductors (NXPI)	A	Dividend			Sold	07/26/24	J		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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1497. TE Connectivity (TEL)		None			Sold	07/26/24	J		
1498. Trane Technologies (TT)		None			Sold	07/26/24	J		
1499. Account #40 (H)									
1500. GS Financial Square Govt Fund (FGTXX) (cash eq.)	A	Dividend			Sold (part)	04/26/24	J		
1501.					Sold (part)	05/22/24	J		
1502.					Buy (add'l)	07/29/24	O		
1503.					Sold	08/05/24	O		
1504. 3M Company (MMM)	A	Dividend			Sold	07/26/24	J		
1505. Abbvie Inc (ABBV)	A	Dividend			Sold	07/26/24	J		
1506. Adobe Inc (ADBE)		None			Sold (part)	05/20/24	J		
1507.					Sold	07/26/24	J		
1508. Advanced Micro Devices (AMD)		None			Sold	07/26/24	J		
1509. Airbnb Inc (ABNB)		None			Sold	07/26/24	J		
1510. Align Technology (ALGN)		None			Buy	05/20/24	J		
1511.					Sold	07/26/24	J		
1512. Allstate Corp (ALL)	A	Dividend			Sold	07/26/24	J		
1513. Alphabet Inc Cl A (GOOGL) (Y)									

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1514. Altria Group (MO)	A	Dividend			Sold	07/26/24	J		
1515. Amazon.com Inc (AMZN) (Y)									
1516. American Express (AXP) (Y)									
1517. American Intl Group (AIG)	A	Dividend			Sold	07/26/24	J		
1518. Ameriprise Financial (AMP)	A	Dividend			Sold	07/26/24	J		
1519. Amgen Inc (AMGN)	A	Dividend			Sold	07/26/24	J		
1520. Amphenol Corp (APH)	A	Dividend			Sold	07/26/24	J		
1521. Analog Devices Inc (ADI)	A	Dividend			Sold	07/26/24	J		
1522. Apple Inc (AAPL) (Y)									
1523. Applied Materials (AMAT)	A	Dividend			Sold	07/26/24	J		
1524. Aptiv PLC (APTV)		None			Buy	05/20/24	J		
1525.					Sold	07/26/24	J		
1526. Arista Networks (ANET)		None			Sold	07/26/24	J		
1527. Arthur J Gallagher (AJG)	A	Dividend			Sold	07/26/24	J		
1528. Automatic Data Processing (ADP)	A	Dividend			Sold	07/26/24	J		
1529. Avalonbay Communities (AVB)		None			Sold	07/26/24	J		
1530. Bank of America (BAC)	A	Dividend			Sold	07/26/24	J		

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1531. Becton Dickinson and Co (BDX)	A	Dividend			Sold	07/26/24	J		
1532. Berkshire Hathaway (BRKB) (Y)									
1533. Bio-Rad Laboratories (BIO)		None			Buy	05/20/24	J		
1534.					Sold	07/26/24	J		
1535. Biogen Inc (BIIB)		None			Buy	05/20/24	J		
1536.					Sold	07/26/24	J		
1537. Blackrock Inc (BLK)	A	Dividend			Sold	07/26/24	J		
1538. Blackstone Group (BLK)	A	Dividend			Sold	07/26/24	J		
1539. Boeing Company (BA)		None			Sold	07/26/24	J		
1540. Booking Holdings Inc (BKNG)		None			Sold	07/26/24	J		
1541. Boston Scientific Corp (BSX)		None			Sold	07/26/24	J		
1542. Bristol Myers Squibb (BMY) (Y)									
1543. Broadcom Inc (AVGO)	A	Dividend			Sold	07/26/24	J		
1544. Cadence Design Systems (CDNS)		None			Sold	07/26/24	J		
1545. Capital One (COF)	A	Dividend			Sold	07/26/24	J		
1546. Carrier Global Corp (CARR)	A	Dividend			Sold	07/26/24	J		
1547. Caterpillar Inc (CAT)	A	Dividend			Sold	07/26/24	J		

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1548. CBRE Group Inc (CBRE)		None			Sold	07/26/24	J		
1549. CDW Corporation (CDW)	A	Dividend			Sold	07/26/24	J		
1550. Cencora Inc (COR)	A	Dividend			Sold	07/26/24	J		
1551. Charles Schwab Corp (SCHW)	A	Dividend			Sold	07/26/24	J		
1552. Charter Communications (CHTR)		None			Buy	05/20/24	J		
1553.					Sold	07/26/24	J		
1554. Chevron Corp (CVX)	A	Dividend			Sold	07/26/24	J		
1555. Chipotle Mexican Grill (CMG)		None			Sold	07/26/24	J		
1556. Cigna Group (CI)		None			Sold	07/26/24	J		
1557. Cintas Corporation (CTAS)	A	Dividend			Sold	07/26/24	J		
1558. Cisco Systems (CSCO)	A	Dividend			Sold	07/26/24	J		
1559. CME Group Inc (CME)	A	Dividend			Sold	07/26/24	J		
1560. Coca Cola Co (KO)	A	Dividend			Sold	07/26/24	J		
1561. Comcast Corp (CMCSA)		None			Sold	05/20/24	J		
1562. Conocophillips Cmn (COP)	A	Dividend			Sold	07/26/24	J		
1563. Copart Inc (CPRT)		None			Sold	07/26/24	J		
1564. Costco Wholesale (COST)	A	Dividend			Sold	07/26/24	J		

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1565. CSX Corporation (CSX)	A	Dividend			Sold	07/26/24	J		
1566. CVS Health Corp (CVS)	A	Dividend			Sold	07/26/24	J		
1567. DR Horton Inc (DHI)	A	Dividend			Sold	07/26/24	J		
1568. Danaher Corp (DHR)	A	Dividend			Sold	07/26/24	J		
1569. Deere & Co (DE)	A	Dividend			Sold	07/26/24	J		
1570. Dexcom Inc (DXCM) (Y)									
1571. Dollar General (DG)	A	Dividend			Buy	05/20/24	J		
1572.					Sold	07/26/24	J		
1573. Dominion Energy (D)	A	Dividend			Sold	07/26/24	J		
1574. Dow Inc (DOW)	A	Dividend			Sold	07/26/24	J		
1575. DTE Energy Co (DTE)	A	Dividend			Sold	07/26/24	J		
1576. Duke Energy Corp (DUK)	A	Dividend			Sold	07/26/24	J		
1577. Dupont De Nemours (DD)	A	Dividend			Sold	07/26/24	J		
1578. Elevance Health Inc (ELV)		None			Sold	07/26/24	J		
1579. Eli Lilly & Co (LLY)	A	Dividend			Sold	07/26/24	K		
1580. Emerson Electric (EMR)	A	Dividend			Sold	07/26/24	J		
1581. Entergy Corp (ETR)	A	Dividend			Sold	07/26/24	J		

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1582. EOG Resources (EOG)	A	Dividend			Sold	07/26/24	J		
1583. Equifax Inc (EFX)	A	Dividend			Sold	07/26/24	J		
1584. Estee Lauder (EL)		None			Sold	05/20/24	J		
1585. Eversource Energy (ES)	A	Dividend			Sold	07/26/24	J		
1586. Exxon Mobil Corp (XOM)	A	Dividend			Sold	07/26/24	J		
1587. Fedex Corp (FDX)	A	Dividend			Sold	07/26/24	J		
1588. Fiserv Inc (FI)		None			Sold	07/26/24	J		
1589. FMC Corporation (FMC)	A	Dividend			Buy	05/20/24	J		
1590.					Sold	07/26/24	J		
1591. Ford Motor Co (F)	A	Dividend			Sold	07/26/24	J		
1592. Fortinet Inc (FTNT)		None			Sold	07/26/24	J		
1593. Freeport McMoran Inc (FCX)	A	Dividend			Sold	07/26/24	J		
1594. GE Aerospace (GE)		None			Sold	07/26/24	J		
1595. GE Healthcare Tech (GEHC)		None			Sold	07/26/24	J		
1596. GE Vernova LLC (GEV)		None			Sold	07/26/24	J		
1597. General Dynamics Corp (GD)	A	Dividend			Sold	07/26/24	J		
1598. General Mills Inc (GIS)	A	Dividend			Sold	07/26/24	J		

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1599. Gilead Sciences (GILD)	A	Dividend			Sold	07/26/24	J		
1600. Halliburton Co (HAL)	A	Dividend			Sold	07/26/24	J		
1601. HCA Healthcare Inc (HCA)	A	Dividend			Sold	07/26/24	J		
1602. Healthpeak LLC (DOC)		None			Sold	07/26/24	J		
1603. Hilton Worldwide (HLT)	A	Dividend			Sold	07/26/24	J		
1604. Honeywell Intl (HON)	A	Dividend			Sold	07/26/24	J		
1605. HP Inc (HPQ)		None			Sold	07/26/24	J		
1606. Humana Inc (HUM)		None			Sold	05/20/24	J		
1607. Idexx Laboratories (IDXX) (Y)									
1608. Illinois Tool Works (ITW)	A	Dividend			Sold	07/26/24	J		
1609. Illumina Inc (ILMN)		None			Buy	05/20/24	J		
1610.					Sold	07/26/24	J		
1611. Intel Corp (INTC)		None			Sold	05/20/24	J		
1612. Intercontinental Exchange Inc (ICE)		None			Sold	07/26/24	J		
1613. Intl Business Machines (IBM)	A	Dividend			Sold	07/26/24	J		
1614. Intuit Inc (INTU)	A	Dividend			Sold	07/26/24	J		
1615. Intuitive Surgical Inc (ISRG)		None			Sold	07/26/24	J		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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1616. Iqvia Holdings Inc (IQV)		None			Sold	07/26/24	J		
1617. Johnson & Johnson (JNJ)	A	Dividend			Sold	07/26/24	J		
1618. Johnson Controls Intl (JCI)		None			Sold	07/26/24	J		
1619. JPMorgan & Chase (JPM)	A	Dividend			Sold	07/26/24	J		
1620. Keurig Dr Pepper Inc (KDP)		None			Sold	07/26/24	J		
1621. KLA Corp (KLAC)	A	Dividend			Sold	07/26/24	J		
1622. Kroger Company (KR)	A	Dividend			Sold	07/26/24	J		
1623. Lam Research Corp (LRCX)	A	Dividend			Sold	07/26/24	J		
1624. Liberty Broadband Corp (LBRDK)		None			Sold	05/20/24	J		
1625. Live Nation Entertainment (LYV)		None			Sold	07/26/24	J		
1626. Lockheed Martin Corp (LMT)	A	Dividend			Sold	07/26/24	J		
1627. Lowes Companies Inc (LOW)	A	Dividend			Sold	07/26/24	J		
1628. Marathon Petroleum Corp (MPC)	A	Dividend			Sold	07/26/24	J		
1629. Marketaxess Holdings (MKTX)	A	Dividend			Buy	05/20/24	J		
1630.					Sold	07/26/24	J		
1631. Marriott International Inc (MAR)	A	Dividend			Sold	07/26/24	J		
1632. Marsh & McLennan Co (MMC)	A	Dividend			Sold	07/26/24	J		

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1633. Mastercard Inc (MA)	A	Dividend			Sold	07/26/24	J		
1634. McDonalds Corp (MCD)	A	Dividend			Sold	07/26/24	J		
1635. McKesson Corp (MCK)	A	Dividend			Sold	07/26/24	J		
1636. Merck & Co (MRK)	A	Dividend			Sold	07/26/24	J		
1637. Meta Platforms Inc (META)	A	Dividend			Sold	07/26/24	K		
1638. Metlife Inc (MET)	A	Dividend			Sold	07/26/24	J		
1639. Mettler-Toledo Intl (MTD)		None			Sold	07/26/24	J		
1640. Micron Technology (MU)	A	Dividend			Sold	07/26/24	J		
1641. Microsoft Corp (MSFT) (Y)									
1642. Mondelez International Inc (MDLZ)	A	Dividend			Sold	07/26/24	J		
1643. Monster Beverage Corp (MNST)		None			Sold	07/26/24	J		
1644. Moody's Corp (MCO)	A	Dividend			Sold	07/26/24	J		
1645. Morgan Stanley (MS)	A	Dividend			Sold	07/26/24	J		
1646. Motorola Solutions Inc (MSI)		None			Sold	07/26/24	J		
1647. MSCI Inc (MSCI)	A	Dividend			Sold	07/26/24	J		
1648. Netflix Inc (NFLX)		None			Sold	07/26/24	J		
1649. Newmarket Corp (NEU)	A	Dividend			Sold	07/26/24	J		

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1650. Newmont Corp (NEM)	A	Dividend			Sold	07/26/24	J		
1651. News Corp (NWSA)	A	Dividend			Sold	07/26/24	J		
1652. Nike Cl B (NKE)	A	Dividend			Buy	05/20/24	J		
1653.					Sold	07/26/24	J		
1654. Norfolk Southern Corp (NSC)	A	Dividend			Sold	07/26/24	J		
1655. Nvidia Corp (NVDA) (Y)									
1656. O'Reilly Automotive Inc (ORLY)		None			Sold	07/26/24	J		
1657. Occidental Petroleum Corp (OXY)	A	Dividend			Sold	07/26/24	J		
1658. Oneok Inc (OKE)	A	Dividend			Sold	07/26/24	J		
1659. On Semiconductor (ON)		None			Buy	05/20/24	J		
1660.					Sold	07/26/24	J		
1661. Oracle Corp (ORCL)	A	Dividend			Sold	07/26/24	J		
1662. Paccar Inc (PCAR)	A	Dividend			Sold	07/26/24	J		
1663. Parker-Hannifin Corp (PH)	A	Dividend			Sold	07/26/24	J		
1664. Paychex Corp (PH)	A	Dividend			Sold	07/26/24	J		
1665. Paypal Holdings (PYPL)		None			Sold	07/26/24	J		
1666. Pepsico Inc (PEP)	A	Dividend			Sold	07/26/24	J		

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1667. Pfizer Inc (PFE)	A	Dividend			Sold	05/20/24	J		
1668. Philip Morris Intl (PM)	A	Dividend			Sold	07/26/24	J		
1669. Phillips 66 (PSX)	A	Dividend			Sold	07/26/24	J		
1670. PNC Financial Services Group (PNC)	A	Dividend			Sold	07/26/24	J		
1671. Procter & Gamble Co (PG)	A	Dividend			Sold	07/26/24	J		
1672. Prudential Financial Inc (PRU)	A	Dividend			Sold	07/26/24	J		
1673. Pulte Group Inc (PHM)	A	Dividend			Sold	07/26/24	J		
1674. Qualcomm Inc (QCOM)	A	Dividend			Sold	07/26/24	J		
1675. Quanta Services (PWR)	A	Dividend			Sold	07/26/24	J		
1676. Regeneron Pharmaceutical (REGN)		None			Sold	07/26/24	J		
1677. Resmed Inc (RMD)	A	Dividend			Buy	05/20/24	J		
1678. Ross Stores Inc (ROST)	A	Dividend			Sold	07/26/24	J		
1679. RTX Corp (RTX)	A	Dividend			Sold	07/26/24	J		
1680. S&P Global Inc (SPGI)		None			Sold	07/26/24	J		
1681. Salesforce Inc (CRM)	A	Dividend			Sold	07/26/24	J		
1682. Sempra Energy (SRE)	A	Dividend			Sold	07/26/24	J		
1683. Servicenow Inc (NOW)		None			Sold	07/26/24	J		

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1684. Sherwin Williams Co (SHW)	A	Dividend			Sold	07/26/24	J		
1685. Starbucks Corp (SBUX)		None			Sold	05/20/24	J		
1686. Stryker Corp (SYK)	A	Dividend			Sold	07/26/24	J		
1687. Synopsys Inc (SNPS)		None			Sold	07/26/24	J		
1688. Sysco Corp (SYY)	A	Dividend			Sold	07/26/24	J		
1689. T Mobile US (TMUS)	A	Dividend			Sold	07/26/24	J		
1690. Take Two Interactive Software (TTWO)		None			Sold	07/26/24	J		
1691. Teleflex Inc (TFX)	A	Dividend			Sold	07/26/24	J		
1692. Tesla Inc (TSLA)		None			Sold (part)	05/20/24	J		
1693.					Sold	07/26/24	J		
1694. Texas Instruments (TXN)	A	Dividend			Sold	07/26/24	J		
1695. The Bank of NY Mellon Corp (BK)	A	Dividend			Sold	07/26/24	J		
1696. The Progressive Corp (PGR)	A	Dividend			Sold	07/26/24	J		
1697. The Southern Co (SO)	A	Dividend			Sold	07/26/24	J		
1698. The Travelers Co (TRV)	A	Dividend			Sold	07/26/24	J		
1699. The Williams Companies Inc (WMB)	A	Dividend			Sold	07/26/24	J		
1700. Thermo Fisher Scientific (TMO)	A	Dividend			Sold	07/26/24	J		

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1701. TJX Companies Inc (TJX)	A	Dividend			Sold	07/26/24	J		
1702. Tractor Supply Co (TSCO)	A	Dividend			Sold	07/26/24	J		
1703. Transdigm Group Inc (TDG)		None			Sold	07/26/24	J		
1704. Transunion (TRU)	A	Dividend			Sold	07/26/24	J		
1705. Truist Finl Corp (TFC)		None			Sold	07/26/24	J		
1706. Uber Technologies (UBER)		None			Buy	05/20/24	J		
1707.					Sold	07/26/24	J		
1708. Union Pacific Corp (UNP)	A	Dividend			Sold	07/26/24	J		
1709. Unitedhealth Group (UNH)	A	Dividend			Sold	07/26/24	J		
1710. United Parcel Service (UPS)		None			Sold	05/20/24	J		
1711. Verisk Analytics (VRSK)	A	Dividend			Sold	07/26/24	J		
1712. Verizon Communications (VZ)	A	Dividend			Sold	07/26/24	J		
1713. Vertex Pharmaceuticals (VRTX)		None			Sold	07/26/24	J		
1714. Visa Inc (V)	A	Dividend			Sold	07/26/24	J		
1715. Vulcan Materials Co (VMC)	A	Dividend			Sold	07/26/24	J		
1716. WW Grainger Inc (GWW) (Y)									
1717. Walmart Inc (WMT)	A	Dividend			Sold	07/26/24	J		

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1718. Walt Disney Co (DIS)	A	Dividend			Sold	07/26/24	J		
1719. Wells Fargo & Co (WFC)	A	Dividend			Sold	07/26/24	J		
1720. Welltower Inc (WELL)	A	Dividend			Sold	07/26/24	J		
1721. The Home Depot (HD)	A	Dividend			Sold	07/26/24	J		
1722. Schlumberger Ltd (SLB) (Y)									
1723. Alexandria Real Estate Eq (ARE)	A	Dividend			Sold	07/26/24	J		
1724. Crown Castle Inc (CCI)	A	Dividend			Sold	07/26/24	J		
1725. Equinix Inc (EQIX)		None			Sold	07/26/24	J		
1726. Prologis Inc (PLD)	A	Dividend			Sold	07/26/24	J		
1727. Public Storage (PSA)	A	Dividend			Sold	07/26/24	J		
1728. Simon Property Group (SPG)	A	Dividend			Sold	07/26/24	J		
1729. Accenture PLC (ACN)	A	Dividend			Sold	07/26/24	J		
1730. Aon Public Ltd Co (AON)	A	Dividend			Sold	07/26/24	J		
1731. Chubb Ltd (CB)	A	Dividend			Sold	07/26/24	J		
1732. Eaton Corp (ETN)	A	Dividend			Sold	07/26/24	J		
1733. Linde PLC (LIN)	A	Dividend			Sold	07/26/24	J		
1734. Lyondellbell Industries (LYB) (Y)									

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	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1735. Medtronic Public Ltd (MDT)	A	Dividend			Sold	07/26/24	J		
1736. NXP Semiconductors (NXPI)	A	Dividend			Sold	07/26/24	J		
1737. Spotify Technology (SPOT)		None			Sold	07/26/24	J		
1738. TE Connectivity (TEL)		None			Sold	07/26/24	J		
1739. Trane Technologies (TT)		None			Sold	07/26/24	J		
1740. Account #41 (H)									
1741. Adobe, Inc. (ADBE)		None			Buy (add'l)	06/18/24	J		
1742. Align Technology, Inc (ALGN)	A	Dividend			Buy	03/14/24	J		
1743.					Sold	04/17/24	J		
1744.					Buy	06/18/24	J		
1745.					Sold	07/01/24	J		
1746. American Electric Power, Inc. (AEP)	A	Dividend			Buy (add'l)	04/17/24	J		
1747. American Water Works Co, Inc. (AWK)	A	Dividend			Buy (add'l)	03/14/24	J		
1748.					Buy (add'l)	04/08/24	J		
1749.					Sold	04/17/24	J		
1750. Aon Public Company (AON)		None			Buy (add'l)	07/01/24	J		
1751. At&T, Inc. (T)	A	Dividend			Buy (add'l)	04/17/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1752. Becton, Dickinson, and Comp (BDX)	A	Dividend			Buy (add'l)	04/17/24	J		
1753. Biogen, Inc. (BIIB)	A	Dividend			Sold	03/14/24	J		
1754.					Buy	04/17/24	J		
1755. Bristol-Myers Squibb Comp (BMY)	A	Dividend			Buy (add'l)	04/08/24	J		
1756.					Buy (add'l)	04/17/24	J		
1757.					Sold (part)	05/21/24	J		
1758.					Sold	06/18/24	J		
1759. Brown-Forman Corporation CL B (BF.B)		None			Buy (add'l)	06/18/24	J		
1760. Catalent, Inc (CTLT)		None			Buy	04/17/24	J		
1761.					Sold	05/21/24	J		
1762. Charter Communications, Inc. (CHTR)	A	Dividend			Buy (add'l)	04/08/24	J		
1763. Coca-Cola Company (KO)	A	Dividend			Buy (add'l)	04/17/24	J		
1764. CoStar Group, Inc. (CSGP)		None			Sold	06/18/24	J		
1765. Crowdstrike Holdings (CRWD)	A	Dividend			Buy (add'l)	07/01/24	J		
1766. Crown Castle Intl Corp (CCI)	A	Dividend			Sold (part)	04/08/24	J		
1767.					Sold (part)	04/17/24	J		
1768.					Buy (add'l)	06/18/24	J		

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1769. CVS Health Corp (CVS)	A	Dividend			Sold	04/17/24	J		
1770. Estee Lauder Cos Inc Class A (EL)	A	Dividend			Sold (part)	04/17/24	J		
1771.					Sold	05/21/24	J		
1772. Etsy, Inc. (ETSY)		None			Sold	05/21/24	J		
1773. Exelon Corp (EXC)	A	Dividend			Buy (add'l)	04/17/24	J		
1774. Exxon Mobil Corporation (XOM)	A	Dividend			Sold (part)	06/18/24	J		
1775.					Buy (add'l)	07/01/24	J		
1776. Ford Motor Company (F)	A	Dividend			Buy (add'l)	03/14/24	J		
1777.					Sold	04/17/24	J		
1778. Fortinet Inc (FTNT)		None			Buy (add'l)	07/01/24	J		
1779. Gilead Sciences (GILD)	A	Dividend			Buy (add'l)	04/17/24	J		
1780.					Sold	05/21/24	J		
1781. Humana, Inc. (HUM)	A	Dividend			Buy (add'l)	06/18/24	J		
1782. Illumina, Inc. (ILMN)	A	Dividend			Buy (add'l)	05/21/24	J		
1783.					Sold	07/01/24	J		
1784. Incyte Corporation (INCY)		None			Buy	04/17/24	J		
1785. Insulet Corp. (PODD)		None			Buy	05/21/24	J		

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1786. Intel Corp. (INTC)	A	Dividend			Sold	05/21/24	J		
1787. Intl Business Machines Corp (IBM)	A	Dividend			Sold	04/17/24	J		
1788. Johnson & Johnson (JNJ)	A	Dividend			Sold (part)	04/08/24	J		
1789.					Buy (add'l)	06/18/24	J		
1790. Kenvue, Inc. (KVUE)		None			Buy	04/08/24	J		
1791.					Sold	04/17/24	J		
1792.					Buy	05/21/24	J		
1793.					Buy (add'l)	06/18/24	J		
1794. Keurig Dr Pepper, Inc. (KDP)	A	Dividend			Buy	04/08/24	J		
1795.					Sold	04/17/24	J		
1796. Las Vegas Sands Corp. (LVS)		None			Buy (add'l)	06/18/24	J		
1797. Lululemon Athletica, Inc. (LULU)		None			Sold (part)	04/08/24	J		
1798.					Buy (add'l)	06/18/24	J		
1799.					Sold	07/01/24	J		
1800. McDonald's Corporation (MCD)	A	Dividend			Sold	06/18/24	J		
1801. Microsoft Corporation (MSFT)	A	Dividend			Buy (add'l)	03/14/24	J		
1802.					Buy (add'l)	04/08/24	J		

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1803.					Sold	05/21/24	J		
1804. Moderna, Inc. (MRNA)	A	Dividend			Buy (add'l)	04/08/24	J		
1805.					Sold	04/17/24	J		
1806. Nextera Energy, Inc. (NEE)	A	Dividend			Buy (add'l)	03/14/24	J		
1807.					Buy (add'l)	04/08/24	J		
1808. Nike Class B (NKE)	A	Dividend			Buy (add'l)	04/08/24	J		
1809.					Sold	07/01/24	J		
1810. Palo Alto Networks (PANW)	A	Dividend			Buy (add'l)	07/01/24	J		
1811. Paycom Software, Inc. (PAYC)		None			Buy	05/21/24	J		
1812.					Buy (add'l)	06/18/24	J		
1813. Pepsico, Inc. (PEP)	A	Dividend			Buy (add'l)	04/08/24	J		
1814.					Buy (add'l)	04/17/24	J		
1815.					Sold	06/18/24	J		
1816. Pfizer, Inc. (PFE)	A	Dividend			Sold (part)	04/08/24	J		
1817.					Sold (part)	04/17/24	J		
1818.					Buy (add'l)	05/21/24	J		
1819.					Sold	06/18/24	J		

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1820. Philip Morris Intl, Inc. (PM)	A	Dividend			Sold	04/08/24	J		
1821. Pioneer Natural Resources Co (PXD)	A	Dividend			Buy (add'l)	04/08/24	J		
1822.					Sold	04/17/24	J		
1823. Proctor & Gamble Company (PG)	A	Dividend			Buy (add'l)	04/17/24	J		
1824. Prologis, Inc. (PLD)	A	Dividend			Buy (add'l)	03/14/24	J		
1825.					Buy (add'l)	05/21/24	J		
1826.					Sold	07/01/24	J		
1827. Public Storage (PSA)	A	Dividend			Sold	04/17/24	J		
1828. Realty Income Corporation (O)	A	Dividend			Sold	03/14/24	J		
1829.					Buy	04/17/24	J		
1830. Regeneron Pharmaceutical, Inc (REGN)	A	Dividend			Sold	04/17/24	J		
1831. SBA Communications Corporation (SBAC)	A	Dividend			Sold	06/18/24	J		
1832. Southwest Airlines Co (LUV)	A	Dividend			Buy	03/14/24	J		
1833. Starbucks Corporation (SBUX)	A	Dividend			Buy (add'l)	06/18/24	J		
1834.					Sold	07/01/24	J		
1835. Super Micro Computer, Inc. (SMCI)	A	Dividend			Buy	04/08/24	J		
1836.					Sold	07/01/24	J		

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1837. Tesla, Inc. (TSLA)	A	Dividend			Sold (part)	03/14/24	J		
1838.					Buy (add'l)	04/17/24	J		
1839.					Sold (part)	05/21/24	J		
1840.					Buy (add'l)	07/01/24	J		
1841. The Boeing Company (BA)		None			Buy (add'l)	06/18/24	J		
1842. The J.M. Smucker Company (SJM)		None			Buy	06/18/24	J		
1843.					Sold	07/01/24	J		
1844. Thermo Fisher Scientific, Inc. (TMO)	A	Dividend			Buy (add'l)	04/08/24	J		
1845.					Sold	04/17/24	J		
1846. Uber Technologies, Inc. (UBER)		None			Sold (part)	05/21/24	J		
1847.					Buy (add'l)	07/01/24	J		
1848. United Parcel Service, Inc. Class B (UPS)	A	Dividend			Buy (add'l)	03/14/24	J		
1849.					Sold (part)	04/17/24	J		
1850.					Buy (add'l)	06/18/24	J		
1851. Verizon Communications, Inc. (VZ)	A	Dividend			Buy (add'l)	04/17/24	J		
1852.					Sold	05/21/24	J		
1853. Vici Properties, Inc. (VICI)	A	Dividend			Buy	04/08/24	J		

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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

Name of Person Reporting	Date of Report
Leibowitz, David S.	08/29/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1854.					Sold	04/17/24	J		
1855.					Buy	07/01/24	J		
1856. Walgreens Boots Alliance, Inc. (WBA)		None			Buy	05/21/24	J		
1857.					Sold	06/18/24	J		
1858. Warner Bros. Discovery, Inc. (WBD)		None			Buy	05/21/24	J		
1859.					Sold	06/18/24	J		
1860. WEC Energy Group, Inc. (WEC)	A	Dividend			Buy (add'l)	04/17/24	J		
1861.					Sold	06/18/24	J		
1862. XCEL Energy, Inc. (XEL)	A	Dividend			Sold (part)	03/14/24	J		
1863.					Buy (add'l)	04/17/24	J		
1864.					Buy (add'l)	06/18/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Part I, lines 20 and 21: The filer has no control over the assets of these private foundations.

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value.

Minor discrepancies, if any, between periodic and annual transaction details are the result of software limitations, brokerage reporting practices, particularly those affecting trade and settle dates, and/or the effect of market changes affecting reportability. Additionally, during 2024, monthly transaction reports were handled on an aggregate basis, while in the annual report for the same period, each transaction was evaluated and reported independently.

Parenthetical numbers in Part VII are CUSIP numbers which, like ticker symbols, are standard asset identifiers. They contain no security-based information. Assets with CUSIP numbers are bonds unless otherwise noted.

Part VII: Value method "V" denotes purchase price formulas outlined in written agreements that accompanied the original purchases.

Part VII, lines 1035, 1111, 1271, 1677, 1741, 1746, 1750-1753, 1759, 1762, 1763, 1765, 1766, 1773, 1774, 1778, 1781, 1784, 1785, 1788, 1790, 1796, 1806, 1810, 1811, 1823, 1828, 1832, 1837, 1841, 1846, 1848, 1853, and 1862: Column C was left blank because these items had no remaining reportable value at the end of the reporting period. There were no corresponding reportable transactions.

Name of Person Reporting	Date of Report
Leibowitz, David S.	08/29/2025

IX. CERTIFICATION.

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

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

Signature: s/ David S. Leibowitz

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 13106)

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