Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Lungstrum, John W.
U.S. District Court - Kansas
Senior District Judge

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

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

/s/ Lungstrum, John W. [electronically signed on Jun 24, 2026 2:53pm by Lungstrum, John W. in JEFS]

I. Positions

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

II. Agreements

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

III A. Filer Non-Investment Income

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

III B. Spouse Non-Investment Income

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

IV. Reimbursements

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

V. Gifts

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

VI. Liabilities

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

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**(H) Individual Assets**				
1-A.	US Bank (cash)	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
2.	**(H) Account #1**				
2-A.	GQG PARTNERS EMERGING MARKETS EQUITY FUND INSTITUTIONAL (GQGIX)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,001 - $50,000
(4).	Sold (part)	Oct 8, 2025	$15,000 or less
(5).	Sold (part)	Nov 18, 2025	$15,000 or less
(6).	Buy (add'l)	Dec 29, 2025	$15,000 or less

2-B.	FS MULTI-STRATEGY ALTERNATIVES FUND CLASS I (FSMSX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 29, 2025	$15,000 or less

2-C.	BLACKROCK ADVANTAGE INTL FUND INSTITUTIONAL CLASS (BROIX)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,001 - $50,000
(2).	Sold	Mar 6, 2025	$15,001 - $50,000

2-D.	BLACKROCK EVENT DRIVEN EQUITY FUND INSTITUTIONAL CLASS (BILPX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

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

2-E.	BLACKROCK TOTAL RETURN FUND CLASS K (MPHQX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	May 20, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 16, 2025	$15,000 or less
(3).	Sold (part)	Oct 8, 2025	$15,000 or less
(4).	Buy (add'l)	Dec 29, 2025	$15,000 or less

2-F.	BLACKROCK ADVANTAGE INTERNATIONAL FUND CLASS K (BROKX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 6, 2025	$15,001 - $50,000

2-G.	BLACKROCK GLOBAL EQUITY MARKET NEUTRAL FUND CLASS K (BGCKX)	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,000 or less
(4).	Sold (part)	Nov 18, 2025	$15,000 or less
(5).	Buy (add'l)	Dec 29, 2025	$15,000 or less

2-H.	BLACKROCK STRATEGIC INCOME OPPORT PORTFOLIO CLASS K (BSIKX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

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

2-I.	DODGE & COX INCOME FUND CLASS I (DODIX)	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	May 20, 2025	$15,000 or less
(2).	Sold (part)	Sep 16, 2025	$15,001 - $50,000

2-J.	HARDING LOEVNER INTERNATIONAL EQUITY PORTFOLIO (HLMIX)	$5,001 - $15,000	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2025	$15,000 or less
(2).	Sold (part)	Feb 27, 2025	$15,000 or less
(3).	Sold (part)	Oct 8, 2025	$15,000 or less
(4).	Buy (add'l)	Dec 29, 2025	$15,000 or less

2-K.	LAZARD GLOBAL LISTED INFRASTRUCTURE PORTFOLIO (GLIFX)	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	May 20, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 16, 2025	$15,000 or less
(3).	Sold (part)	Nov 18, 2025	$15,000 or less

2-L.	THRIVENT SMALL-CAP STOCK FUND (TSCSX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(3).	Buy (add'l)	Nov 18, 2025	$15,000 or less

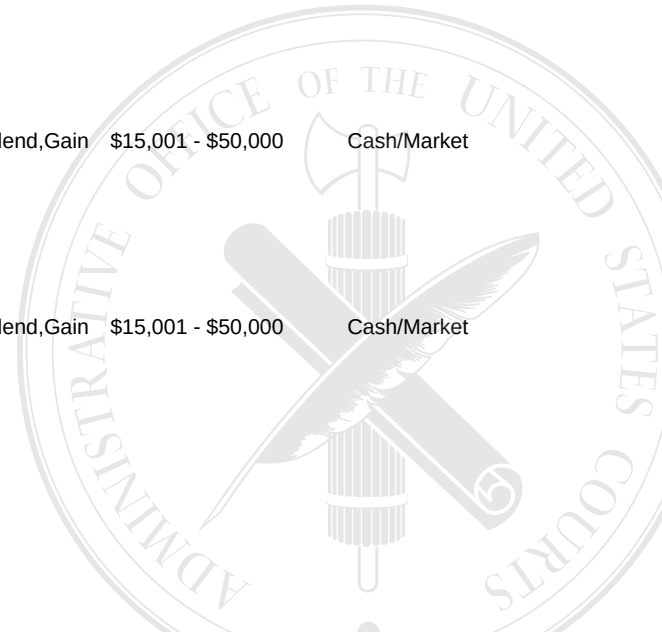
2-M.	BLACKROCK ETF TR II ISHARES FLEXIBLE INCOME ACTIVE ETF (BINC)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-N.	BLACKROCK ETF TR ISHARES A I INNOVATION & TECH ACTIVE ETF (BAI)	$1,000 or less	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Sep 16, 2025	$15,001 - $50,000
(3).	Sold (part)	Oct 8, 2025	$15,000 or less
(4).	Buy (add'l)	Nov 18, 2025	$15,000 or less

2-O.	BLACKROCK ETF TR ISHARES US THEMATIC ROTATION ACTIVE ETF (THRO)	$1,000 or less	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,001 - $50,000
(2).	Sold (part)	Oct 8, 2025	$15,000 or less

2-P.	GLOBAL X FDS GLOBAL X DEFENSE TECH ETF (SHLD)	$1,000 or less	Dividend,Gain	$15,001 - $50,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 16, 2025	$15,001 - $50,000
(2).	Sold (part)	Oct 8, 2025	$15,000 or less
(3).	Buy (add'l)	Nov 18, 2025	$15,000 or less

2-Q.	ISHARES GOLD TR ISHARES (IAU)	$1,000 or less	Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,000 or less
(4).	Sold (part)	Oct 8, 2025	$15,000 or less
(5).	Buy (add'l)	Dec 29, 2025	$15,000 or less

2-R.	ISHARES TR S&P 100 ETF (OEF)	$1,000 or less	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 16, 2025	$15,001 - $50,000
(4).	Sold (part)	Oct 8, 2025	$15,000 or less

2-S.	ISHARES TR S&P 500 GROWTH ETF (IVW)	$5,001 - $15,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 6, 2025	$15,000 or less
(4).	Sold (part)	May 20, 2025	$15,001 - $50,000
(5).	Sold (part)	Sep 16, 2025	$15,000 or less
(6).	Sold (part)	Oct 8, 2025	$15,000 or less
(7).	Buy (add'l)	Nov 18, 2025	$15,000 or less

2-T.	ISHARES TR S&P 500 VALUE ETF (IVE)	$2,501 - $5,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 27, 2025	$15,001 - $50,000
(3).	Buy (add'l)	May 20, 2025	$15,000 or less
(4).	Buy (add'l)	Sep 16, 2025	$15,000 or less
(5).	Sold (part)	Oct 8, 2025	$15,000 or less
(6).	Buy (add'l)	Nov 18, 2025	$15,001 - $50,000

2-U.	ISHARES TR RUSSELL MID-CAP ETF (IWR)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

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

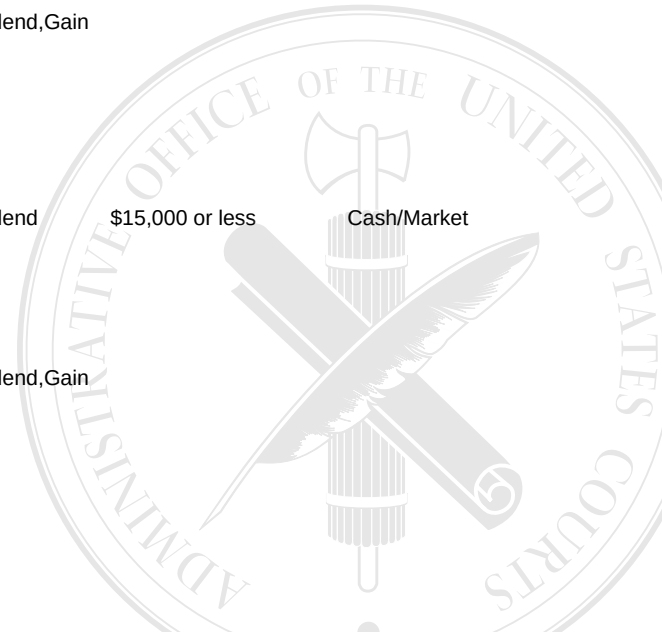
2-V.	ISHARES TR US TECHNOLOGY ETF (IYW)	$5,001 - $15,000	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 2, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(3).	Sold	Sep 16, 2025	$15,001 - $50,000

2-W.	ISHARES TR 10-20 YR TREAS BD ETF (TLH)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	May 20, 2025	$15,000 or less
(2).	Sold (part)	Nov 18, 2025	$15,000 or less

2-X.	ISHARES TR MSCI EAFE VALUE ETF (EFV)	$5,001 - $15,000	Dividend,Gain		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2025	$15,000 or less
(2).	Sold (part)	Feb 27, 2025	$15,001 - $50,000
(3).	Sold (part)	Mar 6, 2025	$15,000 or less
(4).	Buy (add'l)	May 20, 2025	$15,001 - $50,000
(5).	Sold	Sep 16, 2025	$50,001 - $100,000

2-Y.	ISHARES TR MSCI EAFE GROWTH ETF (EFG)	$2,501 - $5,000	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2025	$15,000 or less
(2).	Sold (part)	Feb 27, 2025	$50,001 - $100,000
(3).	Sold	Sep 16, 2025	$15,000 or less

2-Z.	ISHARES INC MSCI EMERGING MKTS EX CHINA ETF (EMXC)	$1,001 - $2,500	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2025	$15,000 or less
(2).	Sold (part)	Feb 27, 2025	$15,001 - $50,000
(3).	Sold	May 20, 2025	$15,000 or less

2-AA.	ISHARES TR ISHARES CURRENCY HEDGED MSCI EAFE ETF (HEFA)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,001 - $50,000
(2).	Sold	May 20, 2025	$15,001 - $50,000

2-AB.	ISHARES TR US INFRASTRUCTURE ETF (IFRA)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 2, 2025	$15,000 or less
(2).	Sold	Feb 27, 2025	$15,001 - $50,000

2-AC.	VANGUARD INFORMATION TECHNOLOGY ETF (VGT)	$2,501 - $5,000	Dividend,Gain		

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

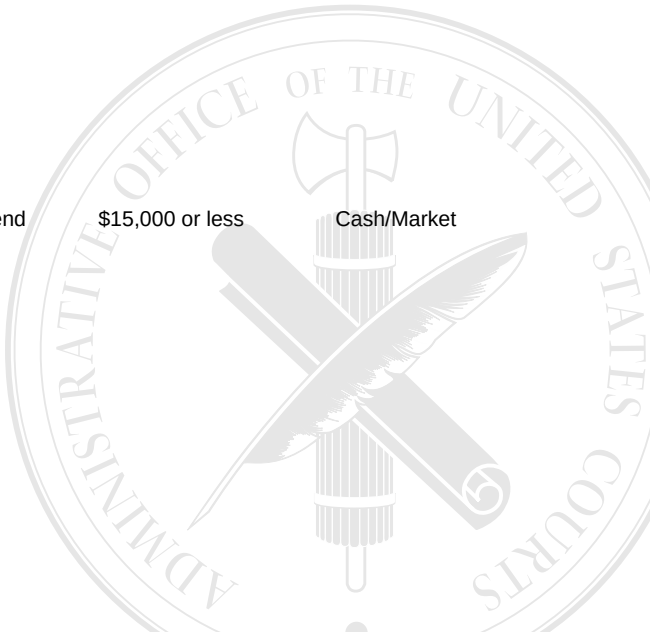
2-AD.	VANGUARD CHARLOTTE FDS TOTAL INTL BD ETF (BNDX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Sep 16, 2025	$15,000 or less

2-AE.	VANGUARD INDEX FDS S&P 500 ETF SHS NEW (VOO)	$15,001 - $50,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$50,001 - $100,000
(3).	Buy (add'l)	Sep 16, 2025	$15,001 - $50,000
(4).	Sold (part)	Oct 8, 2025	$15,000 or less
(5).	Sold (part)	Nov 18, 2025	$15,000 or less

2-AF.	PERSHING PRIME MONEY MARKET (GMBXX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$15,000 or less
(2).	Sold (part)	May 21, 2025	$15,000 or less
(3).	Buy (add'l)	Jun 23, 2025	$15,000 or less
(4).	Sold (part)	Jul 7, 2025	$15,000 or less
(5).	Buy (add'l)	Jul 21, 2025	$15,000 or less
(6).	Buy (add'l)	Sep 22, 2025	$15,000 or less
(7).	Sold (part)	Sep 23, 2025	$15,000 or less
(8).	Buy (add'l)	Oct 2, 2025	$15,000 or less
(9).	Buy (add'l)	Oct 10, 2025	$15,001 - $50,000
(10).	Sold (part)	Oct 15, 2025	$15,001 - $50,000
(11).	Buy (add'l)	Dec 11, 2025	$15,000 or less
(12).	Buy (add'l)	Dec 15, 2025	$15,000 or less
(13).	Buy (add'l)	Dec 17, 2025	$15,000 or less
(14).	Buy (add'l)	Dec 22, 2025	$15,000 or less
(15).	Sold (part)	Dec 30, 2025	$15,000 or less

3.	**(H) Account #2**				
3-A.	GQG PARTNERS EMERGING MARKETS EQUITY FUND INSTITUTIONAL (GQGIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-B.	FS MULTI-STRATEGY ALTERNATIVES FUND CLASS I (FSMSX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-C.	BLACKROCK EVENT DRIVEN EQ FUND INSTIT CLASS (BILPX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-D.	BLACKROCK TOTAL RETURN FUND CLASS K (MPHQX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Dec 10, 2025	$15,000 or less

3-E.	BLACKROCK ADVANTAGE INTERNATIONAL FUND INSTITUTIONAL CLASS (BROI	$1,000 or less	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 6, 2025	$15,000 or less

3-F.	BLACKROCK ADVANTAGE INTL FUND CLASS K (BROKX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-G.	BLACKROCK GLOBAL EQUITY NUETRAL FUND CLASS K (BGCKX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-H.	BLACKROCK STRATEGIC INCOME OPPORTUNITIES PORTFOLIO (BSIKX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-I.	DODGE & COX INCOME FUND CLASS I (DODIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

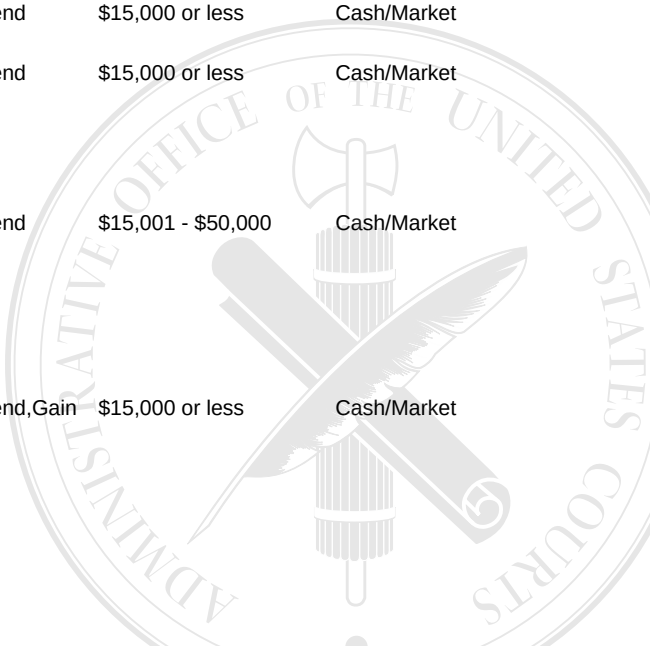
Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$15,000 or less

3-J.	HARDING LOEVNER INTERNATIONAL EQUITY PORTFOLIO (HLMIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-K.	BLACKROCK ETF TR II ISHARES FLEXIBLE INCOME ACTIVE ETF (BINC)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-L.	BLACKROCK ETF TR ISHARES A I INNOVATION & TECH ACTIVE ETF (BAI)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

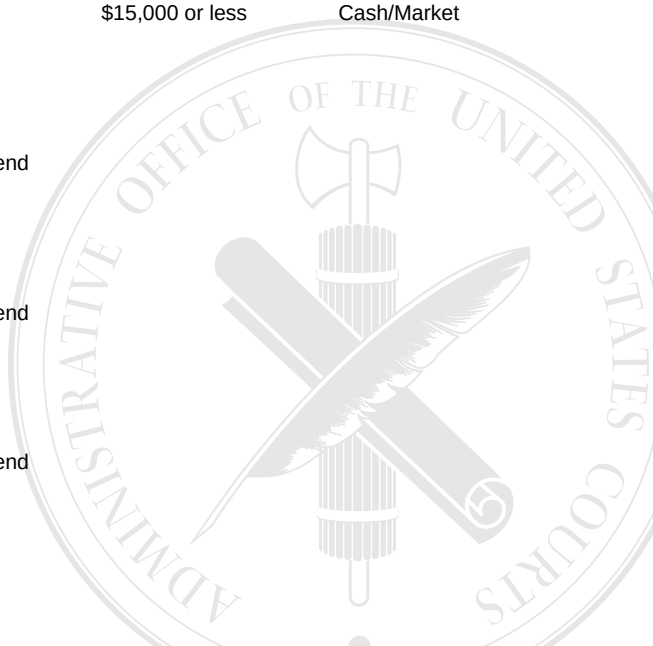
Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 16, 2025	$15,000 or less

3-M.	BLACKROCK ETF TR ISHARES US THEMATIC ROTATION ACTIVE ETF (THRO)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-N.	ISHARES GOLD TR ISHARES NEW (IAU)		None	$15,000 or less	Cash/Market
3-O.	ISHARES TR S&P 100 ETF (OEF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Sep 16, 2025 $15,000 or less				
3-P.	ISHARES TR S&P 500 GROWTH ETF (IVW)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-Q.	ISHARES TR S&P 500 VALUE ETF (IVE)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-R.	ISHARES TR US TECHNOLOGY ETF (IYW)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Sep 16, 2025 $15,000 or less				
3-S.	ISHARES TR 10-20 YR TREAS BD ETF (TLH)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) May 20, 2025 $15,000 or less				
3-T.	ISHARES TR MSCI EAFE VALUE ETF (EFV)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Sep 16, 2025 $15,000 or less				
3-U.	ISHARES TR MSCI EAFE GROWTH ETF (EFG)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Sep 16, 2025 $15,000 or less				
3-V.	ISHARES TR CONV BD ETF (ICVT)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-W.	VANGUARD WORLD FDS VANGUARD INFORMATION TECHNOLOGY EWTF (VGT)	$1,000 or less	Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jan 2, 2025 $15,000 or less				
3-X.	VANGUARD CHARLOTTE FDS TOTAL INTL BD ETF (BNDX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy May 20, 2025 $15,000 or less				
3-Y.	VANGUARD INDEX FDS S&P 500 ETF SHS NEW (VOO)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) May 20, 2025 $15,000 or less				
	(2). Sold (part) Dec 10, 2025 $15,000 or less				
4.	**(H) Account #3**				
4-A.	GQG PARTNERS EMERGING MARKETS EQUITY FUND INSTITUTIONAL (GQGIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jun 2, 2025 $15,000 or less				
4-B.	FS MULTI-STRATEGY ALTERNATIVES FUND CLASS I (FSMSX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-C.	BLACKROCK EVENT DRIVEN EQUITY FUND INSTITUTIONAL FUND (BILPX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jun 2, 2025 $15,000 or less				
4-D.	BLACKROCK TOTAL RETURN FUND CLASS K (MPHQX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) May 28, 2025 $15,001 - $50,000				
	(2). Sold (part) Jul 30, 2025 $15,000 or less				
4-E.	BLACKROCK GLOBAL EQUITY MARKET NEUTRAL FUND CLASS K (BGCKX)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) May 28, 2025 $15,000 or less				
	(2). Sold (part) Jun 2, 2025 $15,000 or less				
	(3). Sold (part) Sep 16, 2025 $15,000 or less				
	(4). Buy (add'l) Oct 21, 2025 $15,000 or less				
4-F.	BLACKROCK STRATEGIC INCOME OPPORTUNITIES PORTFOLIO (BSIKX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-G.	CLIFFWATER ENHANCED LENDING FUND CLASS I (CELFX)	$1,001 - $2,500	Dividend	$15,000 or less	Cash/Market
4-H.	CLIFFWATER CORPORATE LENDING FUND CLASS I (CCLFX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
4-I.	DODGE & COX INCOME FUND CLASS I (DODIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) May 28, 2025 $15,000 or less				
	(2). Sold (part) Jul 30, 2025 $15,000 or less				
	(3). Sold (part) Dec 22, 2025 $15,000 or less				
4-J.	HARDING LOEVNER INTERNATIONAL EQUITY PORTFOLIO (HLMIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jun 2, 2025 $15,000 or less				
4-K.	LAZARD GLOBAL LISTED INFRASTRUCTER PORT INST SHARES (GLIFX)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 30, 2025 $15,000 or less				
4-L.	BLACKROCK ETF TR II ISHARES FLEXIBLE INCOME ACTIVE ETF (BINC)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jun 2, 2025 $15,000 or less				
	(2). Buy (add'l) Jul 30, 2025 $15,000 or less				
4-M.	BLACKROCK ETF TR ISHARES A I INNOVATION & TECH ACTIVE ETF (BAI)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jun 2, 2025 $15,000 or less				
4-N.	GLOBAL X FDS GLOBAL X DEFENSE TECH ETF (SHLD)		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Sep 16, 2025 $15,000 or less				
	(2). Buy (add'l) Dec 22, 2025 $15,000 or less				
4-O.	GOLDMAN SACHS PHYSICAL GOLD ETF UNIT (AAAU)		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jul 30, 2025 $15,000 or less				
4-P.	T ROWE PRICE INSTITUTIONAL FLOATING RATE FUND (RPIFX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 28, 2025 $15,000 or less				
4-Q.	VANGUARD SHORT-TERM BOND INDEX FUND ADMIRAL SHARES (VBIRX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 28, 2025 $15,000 or less				
4-R.	VANGUARD CASH RESERVES FEDERAL MONEY MARKET FUND (VMRXX)	$1,000 or less	Dividend		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 28, 2025 $15,000 or less				
4-S.	ISHARE INC MSCI EMERGING MKTS MIN VOL FACTOR ETF (EEMV)	$1,000 or less	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jun 2, 2025 $15,000 or less				
4-T.	ISHARES TR S&P 100 ETF (OEF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-U.	ISHARES TR CORE S&P 500 ETF (IVV)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
4-V.	ISHARES TR S&P 500 GROWTH ETF (IVW)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jun 2, 2025 $15,000 or less				
4-W.	ISHARES TR S&P 500 VALUE ETF (IVE)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-X.	ISHARES TR 20+ YR TREAS BD ETF (TLT)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jul 30, 2025 $15,000 or less				
	(2). Sold (part) Dec 22, 2025 $15,000 or less				
4-Y.	ISHARES TR RUSSELL MID-CAP ETF (IWR)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-Z.	ISHARES TR RUSSELL 2000 ETF (IWM)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jun 2, 2025 $15,000 or less				
4-AA.	ISHARES TR 10-20 YR TREAS BD ETF (TLH)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jun 2, 2025 $15,000 or less				
	(2). Sold (part) Jul 30, 2025 $15,000 or less				
4-AB.	ISHARES TR MSCI EAFE VALUE ETF (EFV)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-AC.	ISHARES TR MSCI EAFE GROWTH ETF (EFG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-AD.	SELECT SECTOR SPDR TR HEALTH CARE (XLV)	$1,000 or less	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jun 2, 2025 $15,000 or less				
4-AE.	ISHARES TR SYSTEMATIC BD ETF (SYSB)		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 22, 2025 $15,000 or less				
4-AF.	VANGUARD MALVERN FD SHORT-TERM INFLATION PRTCTD SECS INDX (VTIP)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jun 2, 2025 $15,000 or less				
	(2). Sold (part) Dec 22, 2025 $15,000 or less				
4-AG.	VANGUARD CHARLOTTE FDS TOTAL INTL BD ETF (BNDX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jul 30, 2025 $15,000 or less				
	(2). Sold Dec 22, 2025 $15,000 or less				
4-AH.	VANGUARD WORLD FDS INFORMATION TECHNOLOGY ETF (VGT)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-AI.	VANGUARD SCOTTSDALE FDS VANGUARD TOTAL WORLD BD ETF (BNDW)		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 22, 2025 $15,000 or less				
4-AJ.	KKR INFRASTRUCTURE CONGLOMERATE LLC I		None	$15,001 - $50,000	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jul 25, 2025	$15,001 - $50,000

4-AK.	ISHARES GOLD TR ISHARES NEW (IAU)		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 28, 2025	$15,000 or less
(2).	Buy (add'l)	Jun 2, 2025	$15,000 or less
(3).	Sold (part)	Jul 30, 2025	$15,000 or less
(4).	Buy (add'l)	Dec 22, 2025	$15,000 or less

4-AL.	DREYUS MNY MKT FUND SERVICE (GMBXX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 4, 2025	$15,000 or less
(2).	Sold (part)	May 29, 2025	$15,000 or less
(3).	Buy (add'l)	Jul 3, 2025	$15,000 or less
(4).	Sold (part)	Jul 7, 2025	$15,000 or less
(5).	Buy (add'l)	Jul 22, 2025	$15,001 - $50,000
(6).	Buy (add'l)	Jul 23, 2025	$15,000 or less
(7).	Sold (part)	Jul 25, 2025	$15,001 - $50,000
(8).	Sold (part)	Jul 31, 2025	$15,000 or less
(9).	Buy (add'l)	Oct 6, 2025	$15,000 or less
(10).	Sold (part)	Oct 22, 2025	$15,000 or less
(11).	Sold (part)	Dec 23, 2025	$15,000 or less

5.	**(H) Account #4**				
5-A.	EATON VANCE FLOATING RATE FUND CLASS I (EIBLX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
5-B.	EATON VANCE TAX MANAGED GROWTH FUND I (EITMX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
5-C.	EATON VANCE NATIONAL MUNICIPAL INCOME FUND CLASS I (EIHMX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
5-D.	T ROWE PRICE ULTRA SHORT TERM BOND FUND CLASS I (TRSTX)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
5-E.	VANGUARD LIMITED-TERM TAX-EXEMPT FUND ADMIRAL (VMLUX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
5-F.	PIMCO ETF TR ENHANCED SHORT MAT ACTIVE ETF (MINT)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
5-G.	BLACKSTONE REAL ESTATE INCOME TRUST INC -(PER092563)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
5-H.	DREYFUS MONEY MARKET FUND SERVICE (GMBXX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	May 29, 2025	$15,001 - $50,000
(2).	Sold	Jul 1, 2025	$15,000 or less
(3).	Buy	Jul 3, 2025	$15,000 or less
(4).	Buy (add'l)	Oct 16, 2025	$15,001 - $50,000
(5).	Buy (add'l)	Dec 12, 2025	$15,000 or less
(6).	Buy (add'l)	Dec 22, 2025	$15,000 or less

5-I.	DREYFUS PREFERRED GOVERNMENT MONEY MARKET (DSVXX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	May 28, 2025	$15,001 - $50,000
(2).	Sold (part)	Jul 1, 2025	$15,001 - $50,000

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VIII. Additional Information or Explanations

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