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
Marks, Emily C.	U.S. District Court for the Middle District of Alabama	06/16/2025
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		
United States Courthouse One Church Street Montgomery, Alabama 36104		

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.	Board Member	The Johnson Institute
2.		
3.		
4.		
5.		

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.		
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.		
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.					

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.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Marks, Emily C.	06/16/2025

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)	
1. Individual Assets (H)									
2. ServisFirst (cash)	A	Interest	L	T					
3. Wells Fargo (cash)	A	Interest	J	T					
4. Promissory Note - AnDek Holdings, Inc.	A	Interest			Redeemed (part)	01/01/24	J		
5.					Redeemed (part)	02/01/24	J		
6.					Redeemed (part)	03/01/24	J		
7.					Redeemed (part)	04/01/24	J		
8.					Redeemed (part)	05/01/24	J		
9.					Redeemed (part)	06/01/24	J		
10.					Redeemed (part)	07/01/24	J		
11.					Redeemed (part)	08/01/24	J		
12.					Redeemed (part)	09/01/24	J		
13.					Redeemed	10/01/24	J		
14. Account #1 (H)									
15. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	J	T	Sold (part)	01/05/24	J		
16.					Sold (part)	02/16/24	K		
17.					Sold (part)	04/12/24	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; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Marks, Emily C.	06/16/2025

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)	
18.					Sold (part)	05/17/24	J		
19.					Sold (part)	06/06/24	J		
20.					Sold (part)	08/09/24	J		
21.					Buy (add'l)	09/13/24	J		
22.					Sold (part)	10/10/24	J		
23.					Sold (part)	11/15/24	J		
24.					Buy (add'l)	11/29/24	J		
25.					Buy (add'l)	12/18/24	J		
26.					Sold (part)	12/24/24	J		
27.	Fidelity SAI Canada Equity Index Fund (FSCJX)	A	Dividend	J	T	Buy	09/10/24	J		
28.					Sold (part)	11/13/24	J		
29.	Fidelity SAI Inflation Focused Fund (FIFGX)	B	Dividend	K	T	Buy (add'l)	01/05/24	J		
30.					Buy (add'l)	02/16/24	J		
31.					Buy (add'l)	04/12/24	J		
32.					Buy (add'l)	06/06/24	J		
33.					Sold (part)	07/09/24	J		
34.					Buy (add'l)	08/12/24	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
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35.					Sold (part)	09/10/24	J		
36. Strategic Advisors US Total Stock Fd (FSAKX) (was SA Large Cap)	D	Dividend	M	T	Buy (add'l)	01/05/24	J		
37.					Buy (add'l)	02/16/24	J		
38.					Sold (part)	04/12/24	K	C	
39.					Sold (part)	06/06/24	K	C	
40.					Sold (part)	08/12/24	K	D	
41.					Sold (part)	09/10/24	K	C	
42.					Sold (part)	11/13/24	J	A	
43.					Sold (part)	12/24/24	J	A	
44. Strategic Advisers Emerging Markets (FSAMX)	C	Dividend	M	T	Buy (add'l)	04/12/24	J		
45.					Buy (add'l)	06/06/24	K		
46.					Buy (add'l)	08/12/24	J		
47.					Buy (add'l)	09/10/24	J		
48.					Sold (part)	10/10/24	J	A	
49.					Buy (add'l)	11/13/24	J		
50.					Sold (part)	12/24/24	L	C	
51. Strategic Advisers Small-Mid Cap Fund (FSCFX)		None			Sold (part)	01/05/24	J	A	

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52.					Sold	04/12/24	J	B	
53. Strategic Advisers International Fund (FILFX)	D	Dividend	N	T	Buy (add'l)	01/05/24	J		
54.					Buy (add'l)	02/16/24	J		
55.					Sold (part)	04/12/24	J	A	
56.					Buy (add'l)	06/06/24	J		
57.					Buy (add'l)	07/09/24	J		
58.					Sold (part)	10/10/24	J	A	
59.					Sold (part)	11/13/24	J		
60.					Buy (add'l)	12/24/24	M		
61. Fid SAI US Low Volatility Index FD (FSUVX)	A	Dividend	J	T	Buy	04/12/24	K		
62.					Sold (part)	06/06/24	K	A	
63.					Sold (part)	08/12/24	J	A	
64.					Sold (part)	09/10/24	J	A	
65.					Sold (part)	11/13/24	J	B	
66. Fidelity Blue Chip Growth (FBGRX)	C	Dividend	L	T	Buy	06/06/24	K		
67.					Buy (add'l)	08/12/24	K		
68.					Sold (part)	09/10/24	J		

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69. Cohen & Steers Realty Shares (CSRSX)	A	Dividend	K	T	Buy	09/10/24	J		
70.					Buy (add'l)	12/24/24	J		
71. Strategic Advisers Core Income Fund (FPCIX)	D	Dividend	K	T	Sold (part)	04/12/24	K		
72.					Sold (part)	06/06/24	K		
73.					Sold (part)	07/09/24	J	A	
74.					Sold (part)	08/12/24	J	A	
75.					Sold (part)	09/10/24	J	A	
76.					Sold (part)	10/10/24	J	A	
77.					Sold (part)	11/13/24	J	A	
78.					Sold (part)	12/24/24	L		
79. Fid SAI Inflation Protected Bond Index (FSPWX)	A	Dividend	L	T	Buy	09/10/24	J		
80.					Buy (add'l)	10/10/24	K		
81.					Buy (add'l)	11/13/24	J		
82. Fidelity SAI US Treasury Bond Index (FUTBX)	B	Dividend			Buy (add'l)	02/16/24	J		
83.					Buy (add'l)	04/12/24	J		
84.					Sold (part)	06/06/24	J	A	
85.					Buy (add'l)	07/09/24	J		

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86.					Sold (part)	09/10/24	J	A	
87.					Sold	10/10/24	K	A	
88. Fidelity SAI Long Term Treasury Bond (FBLTX)	A	Dividend			Sold	02/16/24	J	A	
89. Account #2 (H)									
90. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	J	T	Sold (part)	11/13/24	J		
91.					Sold (part)	11/15/24	J		
92.					Buy (add'l)	11/29/24	J		
93.					Buy (add'l)	12/12/24	J		
94.					Buy (add'l)	12/13/24	J		
95.					Buy (add'l)	12/18/24	J		
96.					Buy (add'l)	12/24/24	J		
97.					Buy (add'l)	12/26/24	J		
98.					Buy (add'l)	12/31/24	J		
99. Fidelity SAI Canada Equity Index Fund (FSCJX)	A	Dividend	J	T	Buy (add'l)	11/13/24	J		
100. Fid Advisor Stock Selectr Mid Cap Cl Z (FSLZX)	A	Dividend	J	T	Buy	09/10/24	J		
101. Strategic Advisors US Total Stock Fd (FSAKX) (X)	A	Dividend	K	T	Sold (part)	11/13/24	J	A	
102.					Sold (part)	12/24/24	J	A	

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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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103. Strategic Advisers Large Cap Fund (FALCX)	B	Dividend			Sold (part)	04/12/24	J	A	
104.					Buy (add'l)	07/09/24	J		
105.					Merged (with line 101)	08/16/24	J		
106. Strategic Advisers Emerging Markets (FSAMX)	A	Dividend	K	T	Buy (add'l)	11/13/24	J		
107. Strategic Advisers Small-Mid Cap Fund (FSCFX)	B	Dividend			Buy (add'l)	04/12/24	J		
108.					Buy (add'l)	06/06/24	J		
109.					Buy (add'l)	07/09/24	J		
110.					Merged (with line 101)	08/16/24	J		
111. Strategic Advisers International Fund (FILFX)	A	Dividend	J	T	Buy (add'l)	07/09/24	J		
112.					Sold (part)	09/10/24	J	A	
113.					Buy (add'l)	11/13/24	J		
114. Fid SAI Inflation Protected Bond Index (FSPWX)	A	Dividend	J	T	Buy	11/13/24	J		
115. Blackrock Advantage Small Cap Core Inv A (BDSAX)	A	Dividend	J	T	Buy	09/10/24	J		
116.					Buy (add'l)	10/10/24	J		
117.					Buy (add'l)	12/24/24	J		
118. Strategic Advisers Core Income Fund (FPCIX) (Y)									
119. Account #3 (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)	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
Marks, Emily C.	06/16/2025

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)	
120. Vanguard 500 Index Fund Adm (VFIAX)	B	Dividend	M	T					
121. Account #4 (H)									
122. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	J	T	Sold (part)	01/05/24	J		
123.					Sold (part)	02/16/24	J		
124.					Sold (part)	04/12/24	J		
125.					Sold (part)	06/06/24	J		
126.					Buy (add'l)	09/13/24	J		
127.					Sold (part)	10/10/24	J		
128.					Buy (add'l)	12/24/24	J		
129. Fidelity SAI Canada Equity Index Fund (FSCJX)	A	Dividend	J	T	Buy	09/10/24	J		
130.					Sold (part)	11/13/24	J	A	
131. Fidelity SAI Inflation Focused Fund (FIFGX)	B	Dividend	K	T	Buy (add'l)	01/05/24	J		
132.					Buy (add'l)	02/16/24	J		
133.					Buy (add'l)	04/12/24	J		
134.					Buy (add'l)	06/06/24	J		
135.					Sold (part)	07/09/24	J		
136.					Sold (part)	09/10/24	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; 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
Marks, Emily C.	06/16/2025

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)	
137.					Buy (add'l)	11/13/24	J		
138.					Sold (part)	12/24/24	J		
139. Strategic Advisors US Total Stock Fd (FSAKX) (was FALCX)	D	Dividend	L	T	Buy (add'l)	01/05/24	J		
140.					Buy (add'l)	02/16/24	J		
141.					Sold (part)	04/12/24	J	C	
142.					Sold (part)	06/06/24	J	B	
143.					Sold (part)	08/12/24	K	C	
144.					Sold (part)	09/10/24	J	A	
145.					Sold (part)	11/13/24	J	A	
146.					Sold (part)	12/24/24	J		
147. Fidelity Strategic Advisors Emerging Markets Fund (FSAMX)	C	Dividend	M	T	Buy (add'l)	04/12/24	J		
148.					Buy (add'l)	06/06/24	J		
149.					Buy (add'l)	08/12/24	J		
150.					Buy (add'l)	09/10/24	J		
151.					Sold (part)	10/10/24	J	A	
152.					Buy (add'l)	11/13/24	J		
153.					Sold (part)	12/24/24	K	B	

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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Marks, Emily C.	06/16/2025

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)	
154. Strategic Advisers Small-Mid Cap Fund (FSCFX)		None			Sold (part)	01/05/24	J	A	
155.					Sold	04/12/24	J	B	
156. Strategic Advisers International Fund (FILFX)	D	Dividend	M	T	Buy (add'l)	01/05/24	J		
157.					Buy (add'l)	02/16/24	J		
158.					Sold (part)	04/12/24	J	A	
159.					Buy (add'l)	06/06/24	J		
160.					Buy (add'l)	07/09/24	J		
161.					Sold (part)	10/10/24	J	A	
162.					Sold (part)	11/13/24	J		
163.					Buy (add'l)	12/24/24	L		
164. Fid SAI US Low Volatility Index FD (FSUVX)	A	Dividend	J	T	Buy	04/12/24	K		
165.					Sold (part)	06/06/24	J	A	
166.					Sold (part)	08/12/24	J	A	
167.					Sold (part)	09/10/24	J	B	
168.					Sold (part)	10/10/24	J	A	
169.					Sold (part)	11/13/24	J	B	
170. Fidelity Blue Chip Growth (FBGRX)	C	Dividend	K	T	Buy	06/06/24	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
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F =$50,001 - $100,000
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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
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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)	
171.					Buy (add'l)	08/12/24	K		
172.					Sold (part)	09/10/24	J		
173. Cohen & Steers Realty Shares (CSRSX)	A	Dividend	K	T	Buy	09/10/24	K		
174. Strategic Advisers Core Income Fund (FPCIX)	C	Dividend	K	T	Sold (part)	04/12/24	J		
175.					Sold (part)	06/06/24	J		
176.					Sold (part)	07/09/24	J		
177.					Sold (part)	08/12/24	J	A	
178.					Sold (part)	09/10/24	J	A	
179.					Buy (add'l)	10/10/24	J		
180.					Sold (part)	11/13/24	J		
181.					Sold (part)	12/24/24	L		
182. Fid SAI Inflation Protected Bond Index (FSPWX)	A	Dividend	K	T	Buy	09/10/24	J		
183.					Buy (add'l)	10/10/24	K		
184.					Buy (add'l)	11/13/24	K		
185. Fidelity SAI U.S. Treasury Bond Index Fund (FUTBX)	A	Dividend			Buy (add'l)	02/16/24	J		
186.					Buy (add'l)	04/12/24	J		
187.					Sold (part)	06/06/24	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; U =Book Value; V =Other; W =Estimated

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Marks, Emily C.	06/16/2025

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.)*

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188.					Buy (add'l)	07/09/24	J		
189.					Sold (part)	09/10/24	J	A	
190.					Sold	10/10/24	K	A	
191. Fidelity SAI Long Term Treasury Bond Index (FBLTX)	A	Dividend			Buy (add'l)	02/16/24	J		
192.					Sold	02/16/24	J	A	
193. Account #5 (H)									
194. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	A	Dividend	J	T	Sold (part)	01/05/24	J		
195.					Sold (part)	02/16/24	J		
196.					Sold (part)	04/12/24	J		
197.					Buy (add'l)	06/06/24	J		
198. Fid Advisor Stock Selectr Mid Cap Cl Z (FSLZX)	A	Dividend	J	T	Buy	09/10/24	J		
199. Fidelity SAI Canada Equity Index Fund (FSCJX) (X)	A	Dividend	J	T	Buy	11/13/24	J		
200. Strategic Advisors US Total Stock Fd (FSAKX) (X)	C	Dividend	M	T	Sold (part)	11/13/24	L	C	
201.					Sold (part)	12/24/24	J	B	
202. Strategic Advisers Large Cap Fund (FALCX)	D	Dividend			Sold (part)	02/16/24	J	A	
203.					Sold (part)	04/12/24	K	C	
204.					Sold (part)	06/06/24	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
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205.					Sold (part)	07/09/24	K	D	
206.					Merged (with line 200)	08/16/24	M		
207. Fidelity Strategic Advisors Emerging Markets Fund (FSAMX)	B	Dividend	L	T	Buy (add'l)	01/05/24	J		
208.					Buy (add'l)	02/16/24	J		
209.					Sold (part)	07/09/24	J	A	
210.					Buy (add'l)	08/12/24	J		
211.					Buy (add'l)	09/10/24	J		
212.					Sold (part)	10/10/24	J	A	
213.					Buy (add'l)	11/13/24	J		
214. Strategic Advisers Small-Mid Cap Fund (FSCFX)	D	Dividend			Buy (add'l)	04/12/24	K		
215.					Buy (add'l)	06/06/24	J		
216.					Buy (add'l)	07/09/24	J		
217.					Sold (part)	08/12/24	J		
218.					Merged (with line 200)	08/16/24	M		
219. Strategic Advisers International Fund (FILFX)	B	Dividend	L	T	Buy (add'l)	01/05/24	J		
220.					Buy (add'l)	07/09/24	K		
221.					Sold (part)	09/10/24	K	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
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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	
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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)	
222.					Sold (part)	10/10/24	J	A	
223.					Buy (add'l)	11/13/24	L		
224. Blackrock Advantage Small Cap Core Inv A (BDSAX)	A	Dividend	K	T	Buy	09/10/24	J		
225.					Buy (add'l)	10/10/24	J		
226.					Buy (add'l)	11/13/24	J		
227.					Buy (add'l)	12/24/24	J		
228. Fid SAI US Low Volatility Index FD (FSUVX)		None			Buy	08/12/24	J		
229.					Sold	10/10/24	J	A	
230. Strategic Advisers Core Income Fund (FPCIX)	A	Dividend	J	T	Sold (part)	06/06/24	J		
231. Fid SAI Inflation Protected Bond Index (FSPWX)		None	J	T	Buy	10/10/24	J		
232. Fidelity SAI U.S. Treasury Bond Index Fund (FUTBX)	A	Dividend			Buy	02/16/24	J		
233.					Sold (part)	06/06/24	J	A	
234.					Sold	10/10/24	J	A	
235. Account #6 (H)									
236. Vanguard Dividend Growth Inv Cl (VDIGX)	B	Dividend	K	T					
237. Vanguard Windsor II Admiral (VWNAX)	C	Dividend	K	T					
238. Vanguard 500 Index Adm (VFIAX)	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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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. Vanguard Total Stock Market Index Adm (VTSAX)	B	Dividend	L	T					
240. Account #7 (H)									
241. Fidelity Government Money Market (SPAXX) (cash eq.)	A	Dividend	K	T	Sold (part)	11/01/24	J		
242.					Buy (add'l)	11/26/24	J		
243.					Sold (part)	11/29/24	J		
244.					Buy (add'l)	12/30/24	J		
245. FIMM Money Market Portfolio (FMPXX) (cash eq.)	E	Dividend	O	T	Sold (part)	10/30/24	J		
246.					Sold (part)	11/26/24	J		
247.					Sold (part)	12/30/24	J		
248. Account #8 (H)									
249. Fidelity Government Money Market (SPAXX) (cash eq.)	A	Dividend			Buy	08/06/24	K		
250.					Buy (add'l)	08/07/24	J		
251.					Sold	08/08/24	K		
252.					Buy	09/04/24	K		
253.					Buy (add'l)	09/05/24	J		
254.					Sold	09/06/24	K		
255.					Buy	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
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
Marks, Emily C.	06/16/2025

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)	
256.					Buy (add'l)	10/07/24	J		
257.					Sold	10/08/24	K		
258. Fidelity New Millinium (FMILX)	D	Dividend	N	T	Buy	04/24/24	J		
259.					Buy (add'l)	05/01/24	J		
260.					Buy (add'l)	05/08/24	J		
261.					Buy (add'l)	06/11/24	J		
262.					Buy (add'l)	07/11/24	J		
263.					Buy (add'l)	08/02/24	J		
264.					Sold (part)	08/07/24	J		
265.					Buy (add'l)	08/09/24	J		
266.					Buy (add'l)	08/16/24	J		
267.					Buy (add'l)	08/23/24	J		
268.					Buy (add'l)	08/30/24	J		
269.					Sold (part)	09/05/24	J	A	
270.					Buy (add'l)	09/06/24	J		
271.					Buy (add'l)	09/13/24	J		
272.					Buy (add'l)	09/20/24	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

Name of Person Reporting	Date of Report
Marks, Emily C.	06/16/2025

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)	
273.					Buy (add'l)	09/27/24	J		
274.					Buy (add'l)	10/04/24	J		
275.					Sold (part)	10/07/24	J	A	
276.					Buy (add'l)	10/11/24	J		
277.					Buy (add'l)	10/18/24	J		
278.					Buy (add'l)	10/25/24	J		
279.					Buy (add'l)	11/01/24	J		
280.					Buy (add'l)	11/08/24	J		
281.					Buy (add'l)	11/15/24	J		
282.					Buy (add'l)	11/22/24	J		
283.					Buy (add'l)	12/02/24	J		
284.					Buy (add'l)	12/06/24	J		
285.					Buy (add'l)	12/13/24	J		
286.					Buy (add'l)	12/20/24	J		
287.					Buy (add'l)	12/27/24	J		
288.	FIMM Government Portfolio: Instl Cl (FRGXX) (cash eq.)	E	Dividend	O	T	Sold (part)	04/24/24	J		
289.						Sold (part)	05/01/24	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

3. Value Method Codes (See Column C2)
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Name of Person Reporting	Date of Report
Marks, Emily C.	06/16/2025

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)	
290.					Sold (part)	05/08/24	J		
291.					Sold (part)	06/11/24	J		
292.					Sold (part)	07/11/24	J		
293.					Sold (part)	08/02/24	J		
294.					Sold (part)	08/06/24	K		
295.					Sold (part)	08/09/24	J		
296.					Sold (part)	08/16/24	J		
297.					Sold (part)	08/23/24	J		
298.					Sold (part)	08/30/24	J		
299.					Sold (part)	09/04/24	K		
300.					Sold (part)	09/06/24	J		
301.					Sold (part)	09/13/24	J		
302.					Sold (part)	09/20/24	J		
303.					Sold (part)	09/27/24	J		
304.					Sold (part)	10/04/24	K		
305.					Sold (part)	10/08/24	J		
306.					Sold (part)	10/11/24	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	
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Name of Person Reporting	Date of Report
Marks, Emily C.	06/16/2025

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.)*

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307.					Sold (part)	10/18/24	J		
308.					Sold (part)	10/25/24	J		
309.					Sold (part)	11/01/24	J		
310.					Sold (part)	11/08/24	J		
311.					Sold (part)	11/15/24	J		
312.					Sold (part)	11/22/24	J		
313.					Sold (part)	12/02/24	J		
314.					Sold (part)	12/06/24	J		
315.					Sold (part)	12/13/24	J		
316.					Sold (part)	12/20/24	J		
317.					Sold (part)	12/27/24	J		
318. Account #9 (H)									
319. Fidelity Government Cash Reserves (FDRXX) (cash eq.)	C	Dividend	L	T	Sold (part)	01/05/24	K		
320.					Buy (add'l)	01/31/24	J		
321.					Sold (part)	02/16/24	K		
322.					Sold (part)	02/20/24	K		
323.					Buy (add'l)	02/29/24	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
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
Marks, Emily C.	06/16/2025

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)	
324.					Buy (add'l)	03/27/24	J		
325.					Buy (add'l)	03/28/24	J		
326.					Buy (add'l)	04/05/24	J		
327.					Sold (part)	04/12/24	L		
328.					Buy (add'l)	04/15/24	L		
329.					Buy (add'l)	04/30/24	J		
330.					Sold (part)	05/17/24	J		
331.					Buy (add'l)	05/31/24	J		
332.					Sold (part)	06/06/24	J		
333.					Buy (add'l)	06/17/24	J		
334.					Buy (add'l)	06/28/24	J		
335.					Buy (add'l)	07/05/24	J		
336.					Sold (part)	07/09/24	J		
337.					Buy (add'l)	07/31/24	J		
338.					Buy (add'l)	08/08/24	K		
339.					Sold (part)	08/09/24	J		
340.					Sold (part)	08/12/24	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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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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341.					Buy (add'l)	08/30/24	J		
342.					Buy (add'l)	09/06/24	K		
343.					Sold (part)	09/10/24	L		
344.					Buy (add'l)	09/30/24	J		
345.					Buy (add'l)	10/04/24	J		
346.					Buy (add'l)	10/08/24	K		
347.					Sold (part)	10/10/24	K		
348.					Buy (add'l)	10/31/24	J		
349.					Sold (part)	11/13/24	J		
350.					Sold (part)	11/15/24	J		
351.					Buy (add'l)	11/29/24	J		
352.					Buy (add'l)	12/13/24	K		
353.					Buy (add'l)	12/20/24	K		
354.					Sold (part)	12/24/24	K		
355.					Buy (add'l)	12/26/24	K		
356.					Buy (add'l)	12/30/24	J		
357.					Buy (add'l)	12/31/24	J		

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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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358. Fidelity Emerging Markets (FEMKX)		None			Buy	07/09/24	J		
359.					Sold	08/12/24	J		
360. Fidelity Internatl Index Fund (FSPSX)	D	Dividend	J	T	Buy	02/16/24	J		
361.					Buy (add'l)	04/12/24	M		
362.					Buy (add'l)	06/06/24	J		
363.					Buy (add'l)	08/12/24	J		
364.					Sold (part)	12/24/24	M		
365. Fidelity 500 Index Fund (FXAIX)	D	Dividend	O	T					
366. Fidelity Small Cap Index Fund (FSSNX)	B	Dividend	M	T					
367. Fidelity Mid Cap Index Fund (FSMDX)	D	Dividend	N	T					
368. Fidelity Growth Company (FDGRX)	E	Dividend	M	T	Buy (add'l)	01/05/24	K		
369.					Buy (add'l)	04/12/24	K		
370.					Buy (add'l)	06/06/24	J		
371.					Sold (part)	08/12/24	J		
372.					Buy (add'l)	09/10/24	K		
373. LSV Value Equity Fund (LVAEX)	A	Dividend	J	T					
374. Clauseway Emerging Mrkts Fd Inv Cl (CEMVX)		None	J	T	Buy	08/12/24	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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Name of Person Reporting	Date of Report
Marks, Emily C.	06/16/2025

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)	
375. Oakmark Fund (OAKMX)	C	Dividend	N	T					
376. Oakmark International Fund (OAKIX)	B	Dividend	L	T					
377. Hartford Schroders Emrg Mrkt Eqty Cl A (SEMVX)	B	Dividend	M	T	Buy	08/12/24	J		
378.					Buy (add'l)	09/10/24	J		
379.					Buy (add'l)	11/13/24	J		
380.					Buy (add'l)	12/24/24	M		
381. Principal Blue Chip Fund Class A (PBLAX)	D	Dividend	M	T					
382. Vanguard Health Care Adm (VGHAX)	B	Dividend	J	T					
383. SAI Municipal Bond Fund (FSMUX)	D	Dividend	N	T	Buy (add'l)	02/16/24	J		
384.					Buy (add'l)	12/24/24	M		
385. iShares Core S&P 500 ETF (IVV)	D	Dividend	O	T	Buy (add'l)	02/20/24	K		
386.					Buy (add'l)	02/20/24	K		
387.					Buy (add'l)	08/12/24	K		
388. iShares MSCI EAFE ETF (EFA)	D	Dividend	N	T					
389. Ishares Core S&P Mid-Cap ETF (IJH)		None	K	T	Buy	12/24/24	K		
390. iShares Tr EAFE Value ETF (EFV)	B	Dividend	K	T	Buy	02/20/24	K		
391.					Buy (add'l)	07/09/24	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		
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
Marks, Emily C.	06/16/2025

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)	
392.					Buy (add'l)	08/12/24	J		
393.					Buy (add'l)	10/10/24	K		
394.					Sold (part)	12/24/24	K		
395. iShares MSCI EAFE Min Vol Factor ETF (EFAV)	B	Dividend	K	T	Sold (part)	04/15/24	M	D	
396.					Sold (part)	11/13/24	J	A	
397. iShares MSCI USA Quality Factor ETF (QUAL)	D	Dividend	O	T					
398. Account #10 (H)									
399. Prattville Ala Wtr Wks Brd Wtr Rev Bds 2018 (740053HP1)	A	Interest	K	T					
400. Account #11 (H)									
401. Alabama's 529 Vanguard Age-Based Aggressive Portfolio 13-14		None			Sold	05/06/24	M		
402. Alabama's 529 Vanguard Age-Based Aggressive Portfolio 15-16		None	M	T	Buy	05/06/24	M		
403. Account #12 (H)									
404. Alabama's 529 Vanguard Age-Based Aggressive Portfolio 13-14		None	M	T					
405. Account #13 (H)									
406. Fidelity Cash (cash)	A	Interest	J	T					
407. Fidelity Contrafund (FCNTX)	D	Dividend	M	T					
408. Ishares Core S&P 500 ETF (IVV)	B	Dividend	M	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

Name of Person Reporting	Date of Report
Marks, Emily C.	06/16/2025

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)	
409. Account #14 (H)									
410. Fidelity Cash (cash) (Y)									
411. Fidelity Contrafund (FCNTX)	D	Dividend	M	T					
412. Ishares Core S&P 500 ETF (IVV)	A	Dividend	L	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
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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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Name of Person Reporting	Date of Report
Marks, Emily C.	06/16/2025

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

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.

Parenthetical numbers in Part VII are CUSIP numbers which, like ticker symbols, are standard asset identifiers. They contain no security-based information.

Name of Person Reporting	Date of Report
Marks, Emily C.	06/16/2025

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/ Emily C. Marks

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)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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