Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Marks, Emily Coody
U.S. District Court - Alabama Middle
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/ Marks, Emily Coody [electronically signed on Aug 3, 2026 1:55pm by Marks, Emily Coody in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	The Johnson Institute	Non-Profit	Board Member

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.	ServisFirst (cash)	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
1-B.	Wells Fargo (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
2.	**(H) Account #1**				
2-A.	Fidelity Government Cash Reserves (FDRXX) (cash eq.)	$15,001 - $50,000	Dividend	$500,001 - $1,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Sold (part)	Feb 21, 2025	$15,000 or less
(3).	Sold (part)	Mar 14, 2025	$15,000 or less
(4).	Buy (add'l)	Mar 17, 2025	$500,001 - $1,000,000
(5).	Buy	Mar 18, 2025	$500,001 - $1,000,000
(6).	Sold	Mar 18, 2025	$500,001 - $1,000,000
(7).	Sold (part)	Apr 3, 2025	$100,001 - $250,000
(8).	Sold (part)	Apr 7, 2025	$50,001 - $100,000

2-B.	Fidelity Emerging Markets Discovery Fnd (FEDDX)	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 3, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Apr 7, 2025	$50,001 - $100,000

2-C.	Fidelity New Millennium (FMILX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 3, 2025	$15,001 - $50,000

2-D.	Fidelity Blue Chip Growth (FBGRX)	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Jan 31, 2025	$15,000 or less

2-E.	Cohen & Steers Realty Shares (CSRSX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 5, 2025	$15,001 - $50,000

2-F.	Fidelity SAI Canada Equity Index Fund (FSCJX)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 17, 2025	$15,000 or less

2-G.	Fidelity SAI Inflation Focused Fund (FIFGX)		None		

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 24, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 5, 2025	$15,000 or less
(3).	Sold	Mar 17, 2025	$15,001 - $50,000

2-H. Strategic Advisors US Total Stock Fd (FSAKX) $15,001 - $50,000 Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 24, 2025	$50,001 - $100,000
(2).	Sold (part)	Jan 31, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 5, 2025	$15,001 - $50,000
(4).	Sold	Mar 17, 2025	$100,001 - $250,000

2-I. Strategic Advisers Emerging Markets (FSAMX) $50,001 - $100,000 Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Buy (add'l)	Jan 31, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 5, 2025	$15,001 - $50,000
(4).	Sold	Mar 17, 2025	$100,001 - $250,000

2-J. Strategic Advisers International Fund (FILFX) $50,001 - $100,000 Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 24, 2025	$15,000 or less
(2).	Sold (part)	Jan 31, 2025	$15,000 or less
(3).	Sold (part)	Mar 5, 2025	$15,001 - $50,000
(4).	Sold	Mar 17, 2025	$250,001 - $500,000

2-K. Fid SAI US Low Volatility Index FD (FSUVX) $1,000 or less Dividend,Gain

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

2-L. Strategic Advisers Core Income Fund (FPCIX) $5,001 - $15,000 Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Sold	Mar 17, 2025	$50,001 - $100,000

2-M. Fid SAI Inflation Protected Bond Index (FSPWX) $1,000 or less Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Sold	Mar 17, 2025	$50,001 - $100,000

3. **(H) Account #2**

3-A. Fidelity Government Cash Reserves (FDRXX) (cash eq.) $1,001 - $2,500 Dividend $50,001 - $100,000 Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 17, 2025	$50,001 - $100,000
(2).	Buy	Mar 18, 2025	$50,001 - $100,000
(3).	Sold	Mar 18, 2025	$50,001 - $100,000

3-B. Fid Advisor Stock Selectr Mid Cap Cl Z (FSLZX) None $15,000 or less Cash/Market

3-C. Blackrock Advantage Small Cap Core Inv A (BDSAX) $1,000 or less Dividend $15,000 or less Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less

3-D. Fidelity SAI Canada Equity Index Fund (FSCJX) None



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 17, 2025	$15,000 or less

3-E. Strategic Advisors US Total Stock Fd (FSAKX) $5,001 - $15,000 Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 24, 2025	$15,000 or less
(2).	Sold	Mar 17, 2025	$15,001 - $50,000

3-F. Strategic Advisers Emerging Markets (FSAMX) $2,501 - $5,000 Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 17, 2025	$15,001 - $50,000

3-G. Strategic Advisers International Fund (FILFX) $1,001 - $2,500 Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 17, 2025	$15,000 or less

4. **(H) Account #3**

4-A. Vanguard 500 Index Fund Adm (VFIAX) $1,001 - $2,500 Dividend $100,001 - $250,000 Cash/Market

5. **(H) Account #4**

5-A. Fidelity Government Cash Reserves (FDRXX) (cash eq.) $5,001 - $15,000 Dividend $250,001 - $500,000 Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 17, 2025	$500,001 - $1,000,000
(3).	Buy	Mar 18, 2025	$500,001 - $1,000,000
(4).	Sold	Mar 18, 2025	$500,001 - $1,000,000
(5).	Sold (part)	Apr 3, 2025	$50,001 - $100,000
(6).	Sold (part)	Apr 7, 2025	$50,001 - $100,000

5-B. Fidelity Blue Chip Growth (FBGRX) $1,001 - $2,500 Dividend $100,001 - $250,000 Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Jan 31, 2025	$15,000 or less

5-C. Cohen & Steers Realty Shares (CSRSX) $1,000 or less Dividend $15,000 or less Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 5, 2025	$15,000 or less

5-D. MFS Blended Reearch International Equity Cl A (BRXAX) $5,001 - $15,000 Dividend $250,001 - $500,000 Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 3, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Apr 7, 2025	$50,001 - $100,000

5-E. Fidelity SAI Canada Equity Index Fund (FSCJX) $1,000 or less Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 17, 2025	$15,000 or less

5-F. Fidelity SAI Inflation Focused Fund (FIFGX) None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 24, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 5, 2025	$15,000 or less
(3).	Sold	Mar 17, 2025	$15,001 - $50,000

5-G. Strategic Advisors US Total Stock Fd (FSAKX) $15,001 - $50,000 Gain

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 24, 2025	$15,001 - $50,000
(2).	Sold (part)	Jan 31, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 5, 2025	$15,001 - $50,000
(4).	Sold	Mar 17, 2025	$50,001 - $100,000

5-H. Fidelity Strategic Advisors Emerging Markets Fund (FSAMX) — $15,001 - $50,000 — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 5, 2025	$15,001 - $50,000
(3).	Sold	Mar 17, 2025	$100,001 - $250,000

5-I. Strategic Advisers International Fund (FILFX) — $15,001 - $50,000 — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 24, 2025	$15,000 or less
(2).	Sold (part)	Jan 31, 2025	$15,000 or less
(3).	Sold (part)	Mar 5, 2025	$15,001 - $50,000
(4).	Sold	Mar 17, 2025	$100,001 - $250,000

5-J. Fid SAI US Low Volatility Index FD (FSUVX) — $1,000 or less — Gain

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

5-K. Strategic Advisers Core Income Fund (FPCIX) — $2,501 - $5,000 — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Sold	Mar 17, 2025	$15,001 - $50,000

5-L. Fid SAI Inflation Protected Bond Index (FSPWX) — $1,000 or less — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 17, 2025	$15,001 - $50,000

6. **(H) Account #5**

6-A. Fidelity Government Cash Reserves (FDRXX) (cash eq.) — $5,001 - $15,000 — Dividend — $100,001 - $250,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 17, 2025	$250,001 - $500,000
(2).	Buy	Mar 18, 2025	$250,001 - $500,000
(3).	Sold	Mar 18, 2025	$250,001 - $500,000
(4).	Sold (part)	Apr 3, 2025	$15,001 - $50,000
(5).	Sold (part)	Apr 3, 2025	$50,001 - $100,000

6-B. Fidelity New Millinium (FMILX) — $2,501 - $5,000 — Dividend — $50,001 - $100,000 — Cash/Market

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

6-C. Fid Advisor Stock Selectr Mid Cap Cl Z (FSLZX) — $1,001 - $2,500 — Dividend — $15,001 - $50,000 — Cash/Market

6-D. Blackrock Advantage Small Cap Core Inv A (BDSAX) — $1,001 - $2,500 — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Buy (add'l)	Jan 31, 2025	$15,000 or less

6-E. American High Income Class F1 (AHTFX) — $2,501 - $5,000 — Dividend — $50,001 - $100,000 — Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 3, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Apr 7, 2025	$15,001 - $50,000

6-F. Fidelity SAI Canada Equity Index Fund (FSCJX) — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Sold	Mar 17, 2025	$15,000 or less

6-G. Strategic Advisors US Total Stock Fd (FSAKX) — $15,001 - $50,000 — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 24, 2025	$15,000 or less
(2).	Sold	Mar 17, 2025	$100,001 - $250,000

6-H. Fidelity Strategic Advisors Emerging Markets Fund (FSAMX) — $15,001 - $50,000 — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Sold	Mar 17, 2025	$100,001 - $250,000

6-I. Strategic Advisers International Fund (FILFX) — $5,001 - $15,000 — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 31, 2025	$15,000 or less
(2).	Sold	Mar 17, 2025	$50,001 - $100,000

6-J. Strategic Advisers Core Income Fund (FPCIX) — $1,000 or less — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 17, 2025	$15,000 or less

6-K. Fid SAI Inflation Protected Bond Index (FSPWX) — $1,000 or less — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 17, 2025	$15,000 or less

7.	**(H) Account #6**				
7-A.	Vanguard Dividend Growth Inv Cl (VDIGX)	$5,001 - $15,000	Dividend	$15,001 - $50,000	Cash/Market
7-B.	Vanguard Windsor II Admiral (VWNAX)	$5,001 - $15,000	Dividend	$15,001 - $50,000	Cash/Market
7-C.	Vanguard 500 Index Adm (VFIAX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-D.	Vanguard Total Stock Market Index Adm (VTSAX)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
8.	**(H) Account #7**				
8-A.	Fidelity Government Money Market (SPAXX) (cash eq.)	$1,000 or less	Dividend	$15,000 or less	Cash/Market



DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2025	$15,000 or less
(2).	Buy (add'l)	Jan 29, 2025	$15,000 or less
(3).	Sold (part)	Jan 31, 2025	$15,000 or less
(4).	Buy (add'l)	Feb 26, 2025	$15,000 or less
(5).	Sold (part)	Feb 28, 2025	$15,000 or less
(6).	Buy (add'l)	Mar 28, 2025	$15,000 or less
(7).	Sold (part)	Apr 1, 2025	$15,000 or less
(8).	Buy (add'l)	Apr 29, 2025	$15,000 or less
(9).	Sold (part)	May 1, 2025	$15,000 or less
(10).	Sold (part)	May 12, 2025	$15,000 or less
(11).	Buy (add'l)	May 28, 2025	$15,000 or less
(12).	Sold (part)	May 30, 2025	$15,000 or less
(13).	Buy (add'l)	Jun 27, 2025	$15,000 or less
(14).	Sold (part)	Jul 1, 2025	$15,000 or less
(15).	Buy (add'l)	Jul 30, 2025	$15,000 or less
(16).	Sold (part)	Aug 1, 2025	$15,000 or less
(17).	Buy (add'l)	Aug 27, 2025	$15,000 or less
(18).	Sold (part)	Aug 29, 2025	$15,000 or less
(19).	Buy (add'l)	Sep 29, 2025	$15,000 or less
(20).	Sold (part)	Oct 1, 2025	$15,000 or less
(21).	Buy (add'l)	Oct 29, 2025	$15,000 or less
(22).	Sold (part)	Oct 31, 2025	$15,000 or less
(23).	Buy (add'l)	Nov 26, 2025	$15,000 or less

8-B.	FIMM Money Market Portfolio (FMPXX) (cash eq.)	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 29, 2025	$15,000 or less
(2).	Sold (part)	Feb 26, 2025	$15,000 or less
(3).	Sold (part)	Mar 28, 2025	$15,000 or less
(4).	Sold (part)	Apr 29, 2025	$15,000 or less
(5).	Sold (part)	May 12, 2025	$50,001 - $100,000
(6).	Sold (part)	May 28, 2025	$15,000 or less
(7).	Sold (part)	Jun 27, 2025	$15,000 or less
(8).	Sold (part)	Jul 30, 2025	$15,000 or less
(9).	Sold (part)	Aug 27, 2025	$15,000 or less
(10).	Sold (part)	Sep 29, 2025	$15,000 or less
(11).	Sold (part)	Oct 29, 2025	$15,000 or less
(12).	Sold (part)	Nov 26, 2025	$15,000 or less

9. **(H) Account #8**

9-A.	Fidelity Government Money Market (SPAXX) (cash eq.)	$1,001 - $2,500	Dividend	$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).	Sold (part)	Jan 24, 2025	$15,000 or less
(2).	Buy (add'l)	Jan 31, 2025	$15,000 or less
(3).	Sold (part)	Feb 21, 2025	$15,000 or less
(4).	Buy (add'l)	Feb 28, 2025	$15,000 or less
(5).	Sold (part)	Mar 5, 2025	$15,001 - $50,000
(6).	Buy (add'l)	Mar 5, 2025	$15,001 - $50,000
(7).	Sold (part)	Mar 14, 2025	$15,000 or less
(8).	Buy (add'l)	Mar 17, 2025	$250,001 - $500,000
(9).	Sold	Mar 18, 2025	$250,001 - $500,000
(10).	Buy	Mar 18, 2025	$250,001 - $500,000
(11).	Sold (part)	Mar 21, 2025	$15,000 or less
(12).	Sold (part)	Mar 28, 2025	$15,000 or less
(13).	Sold	Apr 1, 2025	$250,001 - $500,000
(14).	Buy	Jun 20, 2025	$15,001 - $50,000
(15).	Buy (add'l)	Sep 19, 2025	$15,000 or less

9-B. Fidelity Emerging Markets (FEMKX) — $1,000 or less — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 5, 2025	$50,001 - $100,000

9-C. Fidelity International Index Fund (FSPSX) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less

9-D. Fidelity 500 Index Fund (FXAIX) — $5,001 - $15,000 — Dividend — $500,001 - $1,000,000 — Cash/Market

9-E. Fidelity Small Cap Index Fund (FSSNX) — $1,001 - $2,500 — Dividend — $100,001 - $250,000 — Cash/Market

9-F. Fidelity Mid Cap Index Fund (FSMDX) — $2,501 - $5,000 — Dividend — $250,001 - $500,000 — Cash/Market

9-G. Fidelity Growth Company (FDGRX) — $5,001 - $15,000 — Dividend — $100,001 - $250,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 31, 2025	$15,000 or less
(2).	Sold (part)	Mar 18, 2025	$15,000 or less

9-H. Fidelity New Millinium (FMILX) — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 3, 2025	$15,000 or less
(2).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(3).	Buy (add'l)	Jan 17, 2025	$15,000 or less
(4).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(5).	Buy (add'l)	Jan 31, 2025	$15,000 or less
(6).	Buy (add'l)	Feb 7, 2025	$15,000 or less
(7).	Buy (add'l)	Feb 14, 2025	$15,000 or less
(8).	Buy (add'l)	Feb 21, 2025	$15,000 or less
(9).	Buy (add'l)	Feb 28, 2025	$15,000 or less
(10).	Buy (add'l)	Mar 7, 2025	$15,000 or less
(11).	Buy (add'l)	Mar 14, 2025	$15,000 or less
(12).	Buy (add'l)	Mar 21, 2025	$15,000 or less
(13).	Buy (add'l)	Mar 28, 2025	$15,000 or less
(14).	Buy (add'l)	Apr 4, 2025	$15,000 or less
(15).	Sold	Apr 8, 2025	$250,001 - $500,000

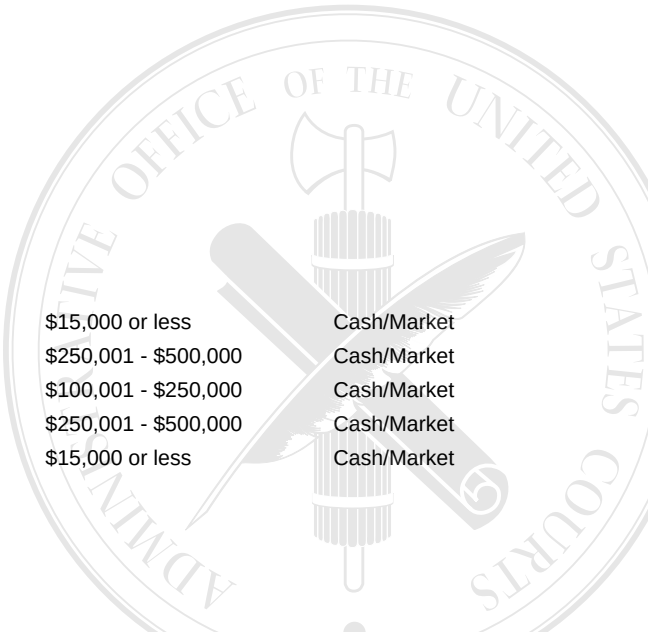
9-I. LSV Value Equity Fund (LVAEX) — $1,001 - $2,500 — Dividend — $15,000 or less — Cash/Market

9-J. Oakmark Fund (OAKMX) — $2,501 - $5,000 — Dividend — $250,001 - $500,000 — Cash/Market

9-K. Oakmark International Fund (OAKIX) — $1,001 - $2,500 — Dividend — $100,001 - $250,000 — Cash/Market

9-L. Principal Blue Chip Fund Class A (PBLAX) — $15,001 - $50,000 — Dividend — $250,001 - $500,000 — Cash/Market

9-M. Vanguard Health Care Adm (VGHAX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
9-N.	FIMM Government Portfolio: Instl Cl (FRGXX) (cash eq.)	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$15,000 or less
(2).	Sold (part)	Jan 13, 2025	$15,000 or less
(3).	Sold (part)	Jan 17, 2025	$15,000 or less
(4).	Sold (part)	Jan 24, 2025	$15,000 or less
(5).	Sold (part)	Jan 31, 2025	$15,000 or less
(6).	Sold (part)	Feb 7, 2025	$15,000 or less
(7).	Sold (part)	Feb 14, 2025	$15,000 or less
(8).	Sold (part)	Feb 21, 2025	$15,000 or less
(9).	Sold (part)	Feb 28, 2025	$15,000 or less
(10).	Sold (part)	Mar 7, 2025	$15,000 or less
(11).	Sold (part)	Mar 14, 2025	$15,000 or less

9-O.	FIMM Money Market Portfolio Cl 1 (FMPXX)	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 1, 2025	$250,001 - $500,000
(2).	Buy (add'l)	Apr 4, 2025	$15,000 or less
(3).	Sold (part)	Apr 8, 2025	$15,000 or less
(4).	Sold (part)	Apr 22, 2025	$50,001 - $100,000

9-P.	Invesco QQQ Tr Unit Ser 1 (QQQ)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 22, 2025	$15,001 - $50,000

9-Q.	Invesco Exch Traded Fd TR II Nasdaq 100 ETF (QQQM)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 5, 2025	$50,001 - $100,000

9-R.	iShares Core S&P 500 ETF (IVV)	$15,001 - $50,000	Dividend	$1,000,001 - $5,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 8, 2025	$250,001 - $500,000
(2).	Buy (add'l)	Apr 22, 2025	$15,001 - $50,000

9-S.	iShares MSCI EAFE ETF (EFA)	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market
9-T.	iShares Tr EAFE Value ETF (EFV)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
9-U.	iShares MSCI EAFE Min Vol Factor ETF (EFAV)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 31, 2025	$15,000 or less

9-V.	iShares MSCI USA Quality Factor ETF (QUAL)	$5,001 - $15,000	Dividend	$500,001 - $1,000,000	Cash/Market
9-W.	iShares US Small Cap Equity Factor ETF (SMLF)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 5, 2025	$50,001 - $100,000

9-X.	Causeway Emerging Mrkts Fd Inv Cl (CEMVX)		None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 5, 2025	$15,000 or less

9-Y.	Hartford Schroders Emrg Mrkt Eqty Cl F (HHHFX)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 5, 2025	$100,001 - $250,000
(2).	Sold	Mar 17, 2025	$15,001 - $50,000

9-Z.	SAI Municipal Bond Fund (FSMUX)	$5,001 - $15,000	Dividend,Gain		

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 5, 2025	$15,001 - $50,000
(2).	Sold	Mar 17, 2025	$250,001 - $500,000

9-AA.	Ishares Core S&P Mid-Cap ETF (IJH)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(2).	Sold	Mar 5, 2025	$15,001 - $50,000

10.	**(H) Account #9**				
10-A.	Prattville Ala Wtr Wks Brd Wtr Rev Bds 2018	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
11.	**(H) Account #10**				

Additional Explanation: This account does not report income; it reflects only unit value.

11-A.	Alabama's 529 Vanguard Age-Based Aggressive Portfolio 15-16		None	$100,001 - $250,000	Cash/Market
12.	**(H) Account #11**				

Additional Explanation: This account does not report income; it reflects only unit value.

12-A.	Alabama's 529 Vanguard Age-Based Aggressive Portfolio 13-14		None	$100,001 - $250,000	Cash/Market
13.	**(H) Account #12**				
13-A.	Fidelity Cash (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
13-B.	Fidelity Contrafund (FCNTX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
13-C.	iShares Core S&P 500 ETF (IVV)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
14.	**(H) Account #13**				
14-A.	Fidelity Cash (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
14-B.	Fidelity Contrafund (FCNTX)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
14-C.	iShares Core S&P 500 ETF (IVV)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

VIII. Additional Information or Explanations

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