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
Moody, Jr., James S.	U.S. District Court, Middle District of Florida	04/14/2025
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 Court Judge - Senior	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
U.S. District Court 801 North Florida Avenue Tampa, FL 33602		

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

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

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Trustee	Trust #1 (reportable assets are listed in Part VII)
2.		
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.	Merrill Lynch	Margin Loan	N
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Moody, Jr., James S.	04/14/2025

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.	Truist (cash)	A	Interest	K	T					
3.	Moody Investments Family Limited Partnership - [redacted]	G	Int./Div.	P2	U					
4.	Missouri Midway, LLC		None	K	U					
5.	Investment Property #1, Longboat Key, FL	E	Rent	O	W					
6.	Investment Property #2, Celo, NC		None	O	W					
7.	Investment Property #4, Highlands, NC - [redacted]	E	Rent	P1	W					
8.	Investment Property #5, Plant City, FL	F	Rent	O	W					
9.	Investment Property #6, Tampa, FL - [redacted]	E	Rent	N	W					
10.	Investment Property #7, Tampa FL - [redacted]	E	Rent	N	W					
11.	Investment Property #8, Tampa FL - [redacted]	E	Rent	N	W					
12.	Investment Property #9, Tampa FL - [redacted]	E	Rent	O	W					
13.	Investment Property #10, Tampa FL - [redacted]	E	Rent	N	W					
14.	Investment Property #11, Tampa FL - [redacted]	E	Rent	N	W					
15.	Investment Property #12, Treasure Island, FL (50% interest) - [redacted]	E	Rent	M	W					
16.	Investment Property #13, Treasure Island, FL (50% interest) - [redacted]	E	Rent	M	W					
17.	Investment Property #15, Highlands, NC - [redacted]		None	P1	W					

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

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

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period: (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period: (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period: (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
18. Gulf to Bay Partners, LLC (real estate, Clearwater, FL) (9% interest)	D	Rent	N	W					
19. Simplify Genomics, Inc.		None	J	W					
20.									
21. Account #1 - [redacted] (H)									
22. ML Bank Deposit Program (cash)	D	Int./Div.	O	T					
23. Akoustis Technologies (AKTS)		None			Sold	02/29/24	J		
24. Alector (ALEC)		None	J	T					
25. Aurora Innovation Inc (AUR)		None			Sold	09/23/24	J		
26. Canopy Growth Corp (CGC)		None	J	T					
27. Carnival Corp (CCL)		None	M	T					
28. Editas Medicine Inc Shs (EDIT)		None			Sold	12/23/24	J		
29. Eventbrite Inc Reg Shs Cl A (EB)		None	K	T					
30. Everspin Technologies (MRAM)		None	K	T					
31. Fathom Digital MFG Corp (FATH)		None			Sold	02/29/24	J		
32. Genius Sports Ltd (GENI)		None	K	T	Buy (add'l)	02/29/24	J		
33. Gossamer Bio Inc (GOSS)		None	J	T	Buy (add'l)	02/29/24	J		
34. Homology Medicines INC (FIXX)		None	J	T					

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2. Value Codes (See Columns C1 and D3)
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure		B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
35.	Invitae Corp (NVTA)		None			Sold	04/29/24	J		
36.	Norwegian Cruise Line Holdings Ltd (NCHL)		None	M	T					
37.	Pliant Therapeutics Inc (PLRX)		None	J	T					
38.	Regions Financial Corp (RF)	A	Dividend	K	T					
39.	Rubicon Technologies (RBT)		None			Sold	04/29/24	J		
40.	Sana Biotechnology Inc (SANA)		None	J	T	Buy (add'l)	02/29/24	J		
41.	Solid Biosciences Inc (SLDB)		None	J	T					
42.	Sorrento Therapeutics (SRNE)		None	J	T					
43.	Tempo Automation (TMPO)		None			Sold	04/29/24	J		
44.	Truist Financial Corp (TFC)	B	Dividend	M	T					
45.	Vicarious Surgical Inc (RBOT)		None	J	T					
46.	Wells Fargo & CO (WFC)	B	Dividend	L	T					
47.	Wynn Resorts, Limited (WYNN) (transferred from Account #10 -[redacted])	B	Dividend	M	T					
48.	Yext Inc (YEXT)		None	J	T					
49.	Calamos Strat Tot Return (CSQ)	C	Dividend	L	T					
50.	WT03 Aurora Innovations Inc (AUROW) (Y)									
51.	WT04 Fathom Digital Manufacturing (FATHW)					Sold	02/29/24	J		

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52. WT Rubicon Technologies (RBTCW)		None			Sold	04/29/24	J		
53. EDIT CALL		None			Sold	02/29/24	J		
54. SANA CALL		None			Sold	02/29/24	J		
55. GOSS CALL		None			Sold	02/29/24	J		
56. GENI CALL		None			Sold	09/30/24	J		
57.									
58. Account #2 - [redacted] (H)									
59. ML Bank Deposit Program (cash)	A	Interest	N	T					
60. Akero Therapeutics Inc (AKRO)		None	J	T					
61. Alector Inc (ALEC)		None	J	T					
62. Annaly Capital (NLY)	C	Dividend	J	T	Buy (add'l)	01/22/24	K		
63. Ares Capital (ARCC)	B	Dividend	K	T					
64. Aurora Innovation Inv (AUR)		None	J	T					
65. Bank of America Corp (BAC)	D	Dividend	N	T					
66. BP PLC (BP)	A	Dividend			Sold	04/22/24	J		
67. Canopy Growth Corp (CGC)		None	J	T					
68. Cibus Inc (CBUS) (Y)									

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69. Coherent Corp (COHR)		None			Sold	05/20/24	M	E	
70. Crispr (CRSPR)		None	L	T	Buy (add'l)	03/18/24	L		
71. C3 AI Inc (AI)		None			Buy (add'l)	03/18/24	J		
72.					Sold	12/23/24	K	B	
73. Fisker Inc (FSR)		None	J	T					
74. Okta Inc (OKTA)		None	J	T	Buy (add'l)	02/21/24	M		
75.					Buy (add'l)	06/14/24	M		
76.					Buy (add'l)	06/24/24	J		
77.					Sold (part)	12/23/24	L		
78.					Sold	12/23/24	K		
79. Super Micro Computer Inc (SMCI)		None	L	T	Sold (part)	05/20/24	N	E	
80.					Buy (add'l)	08/08/24	M		
81. Tilray Inc Reg Shs-2 (TLRY) (Y)									
82. Vivendi SHS UNSP ADR (VIVHY)	A	Dividend	J	T					
83. Yiren Digital Ltd (YRD)	A	Dividend	J	T					
84. Zuora Inc CL A (ZUO)		None	K	T					
85. Calamos Strat Tot Return (CSQ)	C	Dividend	K	T					

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86. WYNN PUT		None			Sold	01/22/24	J		
87. SYM CALL		None			Sold	01/22/24	J		
88. CYBR PUT		None			Sold	01/22/24	J		
89. AI CALL		None			Sold	01/22/24	J		
90. WYNN PUT		None			Sold	02/20/24	J		
91. MU PUT		None			Sold	02/20/24	J		
92. RCL PUT		None			Sold	02/20/24	J		
93. COHR PUT		None			Sold	02/20/24	J		
94. CYBR PUT		None			Sold	02/20/24	J		
95. CRSPR PUT		None			Sold	02/20/24	J		
96. CRSPR PUT		None			Sold	02/20/24	J		
97. CRSPR PUT		None			Sold	02/20/24	J		
98. RCL PUT		None			Sold	02/20/24	J		
99. EDIT PUT		None			Sold	02/21/24	J		
100. SMCI PUT		None			Sold	03/18/24	K		
101. COHR PUT		None			Sold	03/18/24	J		
102. CRSPR PUT		None			Sold	03/18/24	J		

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103. BEAM PUT		None			Sold	03/18/24	J		
104. C3AI CALL		None			Sold	03/18/24	J		
105. OKTA PUT		None			Sold	03/18/24	J		
106. CRSPR CALL		None			Sold	03/19/24	J		
107. SYM PUT		None			Sold	05/20/24	J		
108. OKTA PUT		None			Sold	05/20/24	J		
109. OKTA PUT		None			Sold	05/20/24	J		
110. SMCI PUT		None			Sold	05/20/24	J		
111. ANET PUT		None			Sold	05/21/24	J		
112. SMCI PUT		None			Sold	05/21/24	J		
113. OKTA PUT		None			Sold	05/21/24	J		
114. CYBR PUT		None			Sold	05/23/24	J		
115. COHR PUT		None			Sold	06/24/24	J		
116. OKTA CALL		None			Sold	06/24/24	J		
117. SMCI PUT		None			Sold	06/24/24	J		
118. SMCI PUT		None			Sold	07/10/24	J		
119. ANET PUT		None			Sold	07/22/24	J		

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
120. SNOW PUT		None			Sold	07/22/24	J		
121. TSLA PUT		None			Sold	08/19/24	J		
122. SMCI PUT		None			Sold	08/19/24	J		
123. COHR PUT		None			Sold	08/19/24	J		
124. ON PUT		None			Sold	08/19/24	J		
125. TSLA PUT		None			Buy	08/21/24	J		
126. SNOW PUT		None			Buy	08/21/24	J		
127. SMCI PUT		None			Buy	08/21/24	J		
128. OKTA CALL		None			Sold	09/30/24	J		
129. OKTA CALL		None			Sold	10/23/24	J		
130. CRWD PUT		None			Sold	10/23/24	J		
131. OKTA CALL		None			Sold	10/23/24	J		
132. TSLA PUT		None			Sold	10/23/24	J		
133. COHR PUT		None			Sold	10/23/24	J		
134. COHR PUT		None			Sold	10/23/24	J		
135. TSM PUT		None			Sold	10/29/24	J		
136. COHR PUT		None			Sold	11/18/24	J		

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

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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)	
137. COHR PUT		None			Sold	11/18/24	J		
138. AI CALL		None			Sold	11/18/24	J		
139. SMCI PUT		None			Sold	11/18/24	J		
140. OKTA PUT		None			Sold	12/23/24	J		
141. CRWD PUT		None			Sold	12/23/24	J		
142. SMCI PUT		None			Sold	12/23/24	J		
143. SMCI PUT		None			Sold	12/23/24	J		
144. AI PUT		None			Sold	12/23/24	J		
145. AI PUT		None			Sold	12/26/24	J		
146.									
147. Account #3 (H) - [redacted]									
148. ML Bank Deposit Program (cash) (Y)									
149. BP PLC (BP)	A	Dividend	J	T					
150. Exxon Mobil Corp (XOM)	A	Dividend	K	T					
151. Valero Energy Corp (VLO)	A	Dividend	K	T					
152. Wells Fargo & Co (WFC)	A	Dividend	J	T					
153.									

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
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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
P1 =$1,000,001 - $5,000,000
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3. Value Method Codes (See Column C2)
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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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)	
154. Account #4 - [redacted] (H)									
155. ML Bank Deposit Program (cash)	A	Interest	M	T					
156. Exxon Mobil Corp (XOM)	A	Dividend	J	T					
157. Synovus Financial Corp (SNV)	A	Dividend	J	T	Buy (add'l)	08/19/24	J		
158. Travelers Cos Inc (TRV)	A	Dividend	J	T					
159. Truist Financial Corp (TFC)	A	Dividend	J	T	Buy (add'l)	08/19/24	J		
160. Valero Energy Corp (VLO)	A	Dividend	J	T					
161. Wells Fargo & Co (WFC)	A	Dividend	J	T					
162. JPM Fund (Mutual Fund)	C	Dividend	K	T	Buy	08/19/24	K		
163.									
164. Account #5 - [redacted] (H)									
165. ML Bank Deposit Program (cash)	A	Interest	M	T					
166. ADC Therapeutics SA (ADCT)		None	J	T					
167. Alector (ALEC)		None	J	T					
168. Ardelyx Inc Shs (ARDX)		None	K	T					
169. Avidity Biosciences Inc (RNA)		None	J	T					
170. Biomarin Pharmaceutical Inc (BMRN)		None	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; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

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

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
171. Carnival Corp (CCL)		None	M	T					
172. Crispr Therapeutics AG (CRSP)		None	L	T					
173. Desktop Metal Inc. (DM)		None	J	T					
174. Editas Medicine Inc Shs (EDIT)		None			Sold	12/23/24	J		
175. Fathom Digital MFG Corp (FATH)		None			Sold	03/04/24	J		
176. Genius Sports Ltd (GENI)		None	J	T	Buy (add'l)	02/29/24	J		
177. Gossamer Bio Inc (GOSS)		None	J	T	Buy (add'l)	02/29/24	J		
178. Homology Medicines Inc. (FIXX)		None	J	T					
179. Invitae Corp (NVTA)		None			Sold	04/30/24	J		
180. Karyopharm Therapeutics (KPTI)		None	J	T					
181. Norwegian Cruis Line Holdings LTD (NCL)		None	L	T					
182. Pliant Therapeutics Inc (PLRX)		None	K	T					
183. Precision Biosciences (DTIL)		None	J	T					
184. Q32 Bio Inc (QTTB)		None	J	T	Spinoff (from line 178)				
185. Regions Financial Corp (RF)	B	Dividend	K	T					
186. Sana Biotechnology Inc (SANA)		None	J	T	Buy (add'l)	02/29/24	J		
187. Sorrento Therapeutics (SRNE)		None	J	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
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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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188. Symbotic Inc (SYM)		None	L	T	Buy (add'l)	01/22/24	J		
189.					Buy (add'l)	08/19/24	K		
190.					Sold (part)	10/21/24	L		
191.					Buy (add'l)	10/21/24	K		
192. Truist Financial Corp (TFC)	D	Dividend	M	T					
193. Vicarious Surgical Inc (RBOT) (Y)									
194. Wynn Resorts, Limited (WYNN)	A	Dividend	L	T					
195. Calamos Strat Tot Return (CSQ)	B	Dividend	K	T					
196. WT 1126 Aurora Innovations Inc (AUROW)		None	J	T					
197. WT Fathom Digital Manufacturing (FATHW)		None			Sold	03/04/24	J		
198. SYM CALL		None			Sold	01/22/24	J		
199. ARDX CALL		None			Sold	01/22/24	J		
200. SYM CALL		None			Sold	02/20/24	J		
201. SANA CALL		None			Sold	02/29/24	J		
202. SYM CALL		None			Sold	05/20/24	J		
203. SYM CALL		None			Sold	06/24/24	J		
204. OKTA CALL		None			Sold	06/24/24	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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205. SYM CALL		None			Sold	08/19/24	J		
206. SYM CALL		None			Sold	10/21/24	J		
207. SYM CALL		None			Sold	10/21/24	J		
208. SYM CALL		None			Sold	12/23/24	J		
209. SYM CALL		None			Sold	12/23/24	J		
210.									
211. Account #6 - [redacted] (H)									
212. ML Bank Deposit Program (cash)	C	Interest	N	T					
213. Cibus Inc (CBUS)		None	K	T					
214. Crispr Therapeutics AG (CRSP)		None	M	T	Buy (add'l)	01/22/24	M		
215. Dell Technologies Inc (DELL)	B	Dividend	M	T	Buy	01/25/24	L		
216.					Buy (add'l)	12/11/24	L		
217. Editas Medicine Inc Shs (EDIT)		None	J	T	Buy (add'l)	05/20/24	J		
218. Fisker Inc (FSR) (Y)									
219. Harpoon Therapeutics (HARP)		None			Sold	03/12/24	J		
220. Hookia Pharma Inc (HOOK)		None			Distributed	07/10/24	J		
221. Lumentum Holdings Inc (LITE)		None	M	T	Sold (part)	01/22/24	K		

1. Income Gain Codes: (See Columns B1 and D4) A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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222.					Buy (add'l)	02/20/24	M		
223.					Buy	08/19/24	M		
224.					Buy	08/21/24	M		
225. NVIDIA Corp (NVDA)	A	Dividend	L	T	Buy	09/23/24	L		
226. Okta Inc (OKTA)		None	M	T	Sold (part)	02/20/24	L	D	
227.					Sold (part)	03/18/24	L	D	
228.					Buy (add'l)	06/21/24	J		
229.					Buy (add'l)	06/24/24	M		
230. Pagerduty Inc (PD)		None	K	T					
231. Passage Bio Inc (PASG)		None	J	T					
232. Prevail Therapuetics (PRVL) (Y)									
233. Snowflake Inc (SNOW)		None	K	T	Buy (add'l)	08/19/24	J		
234.					Buy (add'l)	08/21/24	K		
235. Super Micro Computers Inc (SMCI)		None	M	T	Sold (part)	05/20/24	N	E	
236.					Buy (add'l)	07/22/24	L		
237.					Buy (add'l)	08/08/24	L		
238.					Buy (add'l)	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

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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239.					Buy (add'l)	10/04/24	M		
240.					Buy (add'l)	10/21/24	L		
241. Tesla Inc (TSLA)		None			Buy (add'l)	02/15/24	L		
242.					Buy (add'l)	02/16/24	K		
243.					Buy (add'l)	02/22/24	K		
244.					Buy (add'l)	02/22/24	L		transferred to [redacted]
245. Truist Financial Corp (TFC)	B	Dividend			Buy (add'l)	03/18/24	K		
246.					Sold	04/23/24	K		
247. Wynn Resorts LTD (WYNN)	A	Dividend	L	T					
248. SYM PUT		None			Sold	01/22/24	J		
249. LITE PUT		None			Sold	01/22/24	J		
250. OKTA PUT		None			Sold	01/22/24	J		
251. OKTA CALL		None			Sold	01/22/24	J		
252. RCL PUT		None			Sold	01/22/24	J		
253. CYBR PUT		None			Sold	01/22/24	J		
254. SYM PUT		None			Sold	02/20/24	J		
255. MU PUT		None			Sold	02/20/24	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

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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)	
256. RCL PUT		None			Sold	02/20/24	J		
257. COHR PUT		None			Sold	02/20/24	J		
258. CYBR PUT		None			Sold	02/20/24	J		
259. LITE CALL		None			Sold	02/20/24	J		
260. SMCI PUT		None			Sold	02/22/24	K		
261. EDIT PUT		None			Sold	02/29/24	J		
262. SYM PUT		None			Sold	03/18/24	J		
263. MU PUT		None			Sold	03/18/24	J		
264. MU PUT		None			Sold	03/18/24	J		
265. OKTA PUT		None			Sold	03/18/24	J		
266. OKTA PUT		None			Sold	03/18/24	J		
267. RCL PUT		None			Sold	03/18/24	J		
268. QQQ PUT (MF)		None			Sold	05/20/24	J		
269. SMCI PUT		None			Sold	05/20/24	J		
270. SYM PUT		None			Sold	05/20/24	J		
271. OKTA PUT		None			Sold	05/20/24	J		
272. SMCI PUT		None			Sold	05/20/24	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
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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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. NVDA PUT		None			Sold	06/24/24	K		
274. QQQ PUT (MF)		None			Sold	06/24/24	J		
275. RNA PUT		None			Sold	06/24/24	J		
276. SNOW PUT		None			Sold	06/24/24	J		
277. COHR PUT		None			Sold	06/24/24	J		
278. SMCI PUT		None			Sold	06/24/24	J		
279. SMCI PUT		None			Sold	07/10/24	J		
280. NVDA PUT		None			Sold	07/22/24	J		
281. SMCI CALL		None			Sold	07/22/24	J		
282. COHR PUT		None			Sold	07/22/24	J		
283. LITE PUT		None			Sold	07/22/24	J		
284. LITE PUT		None			Sold	07/22/24	J		
285. SMCI PUT		None			Buy (add'l)	07/22/24	J		
286. TSLA PUT		None			Sold	08/19/24	K		
287. SMCI PUT		None			Sold	08/19/24	J		
288. COHR PUT		None			Sold	08/19/24	J		
289. LITE PUT		None			Sold	09/30/24	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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290. TSLA PUT		None			Sold	10/21/24	K		
291. NVDA PUT		None			Sold	10/22/24	J		
292. CRWD PUT		None			Sold	10/22/24	J		
293. CRWD PUT		None			Sold	10/23/24	J		
294. TSM PUT		None			Sold	10/29/24	J		
295. NVDA PUT		None			Sold	11/18/24	J		
296. SMCI PUT		None			Sold	11/19/24	J		
297. SMCI PUT		None			Sold	11/19/24	J		
298. DELL PUT		None			Sold	11/22/24	J		
299. SMCI PUT		None			Sold	11/22/24	J		
300. TSM PUT		None			Sold	12/23/24	J		
301. TSM PUT		None			Sold	12/23/24	J		
302. NVDA PUT		None			Sold	12/23/24	J		
303. SNOW PUT		None			Sold	12/23/24	J		
304. OKTA PUT		None			Sold	12/23/24	J		
305. CRWD PUT		None			Sold	12/23/24	J		
306. CRWD PUT		None			Sold	12/23/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period: (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period: (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period: (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
307. SMCI PUT		None			Sold	12/23/24	J		
308. SMCI PUT		None			Sold	12/23/24	J		
309. AMD PUT		None			Sold	12/23/24	J		
310.									
311. Account #7 - [redacted] (H) Closed 2022									
312.									
313. Account #8 - [redacted] (H)									
314. Proctor & Gamble (PG)	A	Dividend	K	T					
315. Starbucks Corp (SBUX)	A	Dividend	K	T					
316. Travelers Cos Inc (TRV)	A	Dividend	K	T					
317. Valero Energy Corp (VLO)	A	Dividend	J	T					
318.									
319. Account #9 - [redacted] (H)									
320. ML Bank Deposit Program	E	Dividend	P1	T					
321. Advanced Micro Devices Inc (AMD)		None	L	T	Buy	12/23/24	L		
322. Applied Materials Inc (AMAT)	B	Dividend	J	T	Buy	10/23/24	K		
323.					Buy	12/23/24	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
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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
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324. ASML Holding NV (ASML)	B	Dividend	M	T	Buy	12/23/24	M		
325. Avidity Biosciences Inc (RNA)		None			Sold	06/24/24	K	D	
326. Biomarin Pharmaceutical Inc (BMRN)		None	J	T	Sold	01/22/24	L	C	
327.					Buy	01/22/24	L		
328. BLF Treasury Trust (cash)	A	Interest	K	T					
329. Carnival Corp (CCL)		None	L	T	Buy (add'l)	05/20/24	K		
330.					Buy (add'l)	07/22/24	K		
331.					Sold (part)	07/22/24	K		
332.					Buy (add'l)	08/19/24	K		
333.					Buy (add'l)	09/30/24	K		
334.					Sold (part)	10/21/24	K		
335.					Buy (add'l)	10/22/24	K		
336.					Buy (add'l)	11/18/24	L		
337.					Sold (part)	11/18/24	K		
338.					Sold (part)	11/18/24	K		
339.					Buy (add'l)	12/23/24	K		
340.					Sold (part)	12/23/24	K		

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

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341. Coherent Corp (COHR)		None			Sold (part)	02/20/24	M	E	
342.					Buy (add'l)	02/20/24	M		
343.					Sold (part)	06/24/24	M	D	
344.					Sold	07/22/24	L	C	
345. Comerica Inc (CMA)	B	Dividend			Buy	06/24/24	K		
346.					Sold	08/19/24	L	C	
347. Crowdstrike Holdings Inc (CRWD)		None			Buy	07/23/24	M		
348.					Sold	10/21/24	M	D	
349. Cyber-Ark Software Ltd (CYBR)		None			Sold	01/22/24	M	E	
350. Dell Technologies Inc (DELL)	B	Dividend	L	T	Buy	11/22/24	L		
351.					Buy	11/22/24	L		
352. Digital Realty Trust Inc (DLR)		None			Buy (add'l)	02/02/24	K		
353.					Sold	07/22/24	K		
354. Invesco Fund (QQQ)	A	Dividend			Buy	08/19/24	L		
355. Lumentum Holdings Inc (LITE)		None			Buy (add'l)	02/20/24	M		
356.					Sold (part)	07/22/24	M		
357.					Sold	09/23/24	M		

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

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

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358. NVIDIA Corp (NVDA)	A	Dividend			Buy	10/22/24	L		
359.					Buy (add'l)	11/18/24	L		
360.					Sold	11/18/24	L		
361. Okta Inc (OKTA)		None			Buy	12/23/24	L		
362.					Sold	12/23/24	M		
363. PENN Entertainment Inc (PENN)		None	L	T					
364. Revolution Medicines Inc (RVMD)		None			Sold	01/22/24	J	A	
365.					Buy	01/22/24	J		
366.					Sold	03/18/24	K	C	
367. Royal Caribbean Cruises Ltd (RCL)		None			Sold	01/22/24	M	C	
368. Snowflake Inc (SNOW)		None			Buy (add'l)	08/19/24	K		
369.					Buy (add'l)	11/18/24	K		
370.					Sold	12/23/24	M	D	
371. Super Micro Computer Inc (SMCI)		None	M	T	Buy	05/20/24	N		
372.					Buy (add'l)	10/30/24	K		
373.					Sold (part)	11/18/24	K		
374.					Buy (add'l)	12/20/24	L		

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

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
375.					Sold (part)	12/23/24	L		
376. Synovus Financial Corp (SNV)	B	Dividend	J	T	Buy (add'l)	07/22/24	K		
377.					Sold (part)	07/22/24	K	D	
378.					Sold (part)	11/18/24	K	C	
379. Teladoc Health Inc (TDOC)		None			Sold	05/20/24	J		
380. Tesla Inc (TSLA)		None			Buy (add'l)	02/20/24	L		
381.					Buy (add'l)	02/22/24	L		
382.					Sold	08/19/24	N		
383. Truist Financial Corp (TFC)	A	Dividend	J	T	Sold (part)	01/22/24	K	A	
384. Wynn Resorts LTD (WYNN)	C	Dividend	M	T	Sold (part)	02/16/24	M		
385.					Buy (add'l)	02/20/24	K		
386.					Sold (part)	02/20/24	K	C	
387.					Buy (add'l)	02/20/24	L		
388. WYNN CALL		None			Sold	01/22/24	J		
389. BMRN CALL		None			Sold	01/22/24	J		
390. TDOC CALL		None			Sold	01/25/24	J		
391. WYNN CALL		None			Buy	01/26/24	J		

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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
392. WYNN CALL		None			Sold	01/26/24	J		
393. WYNN CALL		None			Sold	02/20/24	J		
394. COHR CALL		None			Sold	02/20/24	J		
395. LITE CALL		None			Sold	02/20/24	J		
396. LITE CALL		None			Sold	02/20/24	J		
397. TSLA CALL		None			Sold	02/20/24	J		
398. TSLA CALL		None			Sold	02/20/24	J		
399. CCL CALL		None			Sold	02/22/24	J		
400. TSLA CALL		None			Sold	02/22/24	J		
401. TSLA CALL		None			Sold	02/23/24	J		
402. TSLA CALL		None			Sold	02/23/24	J		
403. BMRN CALL		None			Sold	03/18/24	J		
404. SMCI CALL		None			Sold	05/20/24	K		
405. RNA CALL		None			Sold	05/20/24	J		
406. COHR CALL		None			Sold	05/20/24	J		
407. CRSPR CALL		None			Sold	05/20/24	J		
408. LITE CALL		None			Sold	05/20/24	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		

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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)	
409. LITE CALL		None			Sold	05/20/24	J		
410. WYNN CALL		None			Sold	05/20/24	J		
411. SMCI CALL		None			Sold	06/24/24	J		
412. SMCI CALL		None			Sold	06/24/24	K		
413. CMA CALL		None			Sold	06/24/24	J		
414. TSLA CALL		None			Sold	06/24/24	K		
415. SNV CALL		None			Sold	07/22/24	J		
416. CCL CALL		None			Sold	08/19/24	J		
417. LITE CALL		None			Sold	08/19/24	J		
418. PENN CALL		None			Sold	08/19/24	J		
419. SNOW CALL		None			Sold	08/19/24	J		
420. BMRN CALL		None			Sold	08/19/24	J		
421. INVESCO FUND CALL (MF) ***		None			Sold	08/19/24	J		
422. NVDA CALL		None			Sold	09/30/24	K		
423. QQQM CALL		None			Sold	09/30/24	J		
424. CCL CALL		None			Sold	09/30/24	J		
425. SNV CALL		None			Sold	09/30/24	J		

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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
426. CRWD CALL		None			Sold	09/30/24	J		
427. WYNN CALL		None			Sold	10/07/24	J		
428. WYNN CALL		None			Sold	10/07/24	J		
429. SMCI CALL		None			Sold	10/14/24	J		
430. NVDA CALL		None			Sold	10/22/24	J		
431. SNOW CALL		None			Sold	10/22/24	J		
432. SMCI CALL		None			Sold	10/22/24	J		
433. AMAT CALL		None			Sold	10/23/24	K		
434. SMCI CALL		None			Sold	10/30/24	J		
435. SMCI CALL		None			Sold	10/30/24	J		
436. NVDA CALL		None			Sold	11/18/24	J		
437. CCL CALL		None			Sold	11/18/24	J		
438. SNOW CALL		None			Sold	11/18/24	J		
439. PENN CALL		None			Sold	11/18/24	J		
440. OKTA CALL		None			Sold	11/18/24	J		
441. SMCI CALL		None			Sold	11/18/24	J		
442. SMCI CALL		None			Sold	11/18/24	J		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
B =$1,001 - $2,500
C =$2,501 - $5,000
D =$5,001 - $15,000
E =$15,001 - $50,000
F =$50,001 - $100,000
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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
P1 =$1,000,001 - $5,000,000
P2 =$5,000,001 - $25,000,000
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3. Value Method Codes (See Column C2)
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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443. CCL CALL		None			Sold	11/18/24	J		
444. DELL CALL		None			Sold	11/22/24	J		
445. SMCI CALL		None			Sold	12/20/24	J		
446. NVDA CALL		None			Sold	12/23/24	J		
447. AMAT CALL		None			Sold	12/23/24	J		
448. QQQM CALL		None			Sold	12/23/24	J		
449. OKTA CALL		None			Sold	12/23/24	J		
450. ASML CALL		None			Sold	12/23/24	J		
451. WYNN CALL		None			Sold	12/23/24	J		
452. NCLH CALL		None			Sold	12/23/24	J		
453. SMCI CALL		None			Sold	12/23/24	J		
454. SMCI CALL		None			Sold	12/23/24	J		
455. CCL CALL		None			Sold	12/23/24	J		
456. AMD CALL		None			Sold	12/23/24	J		
457.									
458. Account #10 - [redacted] (H)									
459. ML Bank Deposit Program (cash)	A	Interest	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
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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)	
460. Advanced Micro Devices Inc (AMD)		None	K	T	Buy	12/23/24	J		
461. Akero Therapeutics Inc (AKRO)		None	K	T	Sold (part)	07/17/24	K		
462.					Buy (add'l)	07/22/24	K		
463.					Sold (part)	09/23/24	K		
464.					Buy (add'l)	09/30/24	K		
465. Beam Therapeutics Inc (BEAM)		None			Sold	03/18/24	K		transferred from [redacted]
466. Carnival Corp (CCL)		None	K	T					transfferred to [redacted]
467. Coherent Corp (COHR)		None			Sold (part)	02/20/24	M		
468.					Buy (add'l)	05/21/24	M		
469.					Sold	06/24/24	M	E	
470. Crispr Therapeutics AG (CRSP)		None			Sold (part)	02/20/24	M	E	
471.					Sold	07/22/24	J		
472. Crowdstrike Holdings Inc (CRWD)		None			Buy	07/23/24	L		
473.					Sold	10/21/24	L	B	
474. Dell Technologies Inc (DELL)	A	Dividend	L	T	Buy	11/24/24	L		
475. Digital Realty Trust Inc (DLR)		None			Sold	07/22/24	K		
476. NVIDIA (NVDA)	A	Dividend	L	T	Buy	06/24/24	L		

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

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☐ 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)	
477. Okta Inc (OTKA)		None			Sold (part)	02/20/24	M		
478.					Sold (part)	03/18/24	M		
479.					Sold	12/23/24	J		
480. On Semiconductor CRP Com (ON)		None	N	T	Buy (add'l)	01/30/24	L		
481.					Sold	08/19/24	M		
482.					Buy	08/19/24	M		
483. PENN Entertainment Inc (PENN)		None	K	T					
484. Snowflake Inc (SNOW)		None			Buy	06/24/24	L		
485.					Sold	12/23/24	L	C	
486. Super Micro Computer Inc (SMCI)		None	L	T	Buy	05/21/24	N		
487.					Sold (part)	12/23/24	K		
488. Symbotic Inc (SYM)		None	K	T	Buy (add'l)	08/19/24	L		transferred from [redacted]
489.					Sold	10/21/24	M		
490.					Buy	10/23/24	L		
491. Taiwan Semiconductor Mfg. Co. Ltd. (TSM)	B	Dividend	M	T					transferred from [redacted]
492. Tesla Inc. (TSLA)		None			Buy (add'l)	02/22/24	L		transferred from [redacted]
493.					Sold	08/19/24	M		

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
494. Truist Financial Corp (TFC)	A	Dividend	L	T	Sold (part)	09/23/24	L		
495.					Buy (add'l)	09/30/24	L		
496.					Sold (part)	10/21/24	L	D	
497. Wynn Resorts Ltd (WYNN)	A	Dividend	J	T	Sold (part)	02/16/24	M		transferred to [redacted]
498. ON CALL		None			Sold	01/22/24	J		
499. COHR CALL		None			Sold	01/22/24	J		
500. ON CALL		None			Sold	01/22/24	J		
501. WYNN CALL		None			Buy	01/26/24	J		
502. WYNN CALL		None			Sold	01/26/24	J		
503. BEAM CALL		None			Sold	02/12/24	J		
504. OKTA CALL		None			Sold	02/20/24	J		
505. ON CALL		None			Sold	02/20/24	J		
506. SYM CALL		None			Sold	02/20/24	J		
507. ON CALL		None			Sold	02/20/24	J		
508. TSLA CALL		None			Sold	02/20/24	J		
509. AKRO CALL		None			Sold	02/20/24	J		
510. CCL CALL		None			Sold	02/22/24	J		

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

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

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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
511. TSLA CALL		None			Sold	02/22/24	J		
512. TSLA CALL		None			Sold	02/23/24	J		
513. ON CALL		None			Sold	03/18/24	J		
514. DLR CALL		None			Sold	03/18/24	J		
515. WFC CALL		None			Sold	05/21/24	J		
516. SMCI CALL		None			Sold	05/21/24	K		
517. COHR CALL		None			Sold	05/21/24	J		
518. SYM CALL		None			Sold	05/21/24	J		
519. CRSPR CALL		None			Sold	05/21/24	J		
520. NVDA CALL		None			Sold	06/24/24	J		
521. SNOW CALL		None			Sold	06/24/24	J		
522. SMCI CALL		None			Sold	06/24/24	J		
523. SMCI CALL		None			Sold	06/24/24	K		
524. ON CALL		None			Sold	06/24/24	J		
525. SYM CALL		None			Sold	06/24/24	J		
526. TFC CALL		None			Sold	06/24/24	J		
527. AKRO CALL		None			Sold	06/24/24	J		

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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
528. TSLA CALL		None			Sold	06/24/24	J		
529. NVDA CALL		None			Sold	07/22/24	J		
530. AKRO CALL		None			Sold	07/22/24	J		
531. CRWD CALL		None			Sold	07/26/24	J		
532. SYM CALL		None			Sold	08/19/24	J		
533. ON CALL		None			Sold	09/30/24	J		
534. ON CALL		None			Sold	09/30/24	J		
535. CRWD CALL		None			Sold	09/30/24	J		
536. TFC CALL		None			Sold	09/30/24	J		
537. AKRO CALL		None			Sold	09/30/24	J		
538. WYNN CALL		None			Sold	10/08/24	J		
539. SMCI CALL		None			Sold	10/14/24	J		
540. NVDA CALL		None			Sold	10/23/24	K		
541. ON CALL		None			Sold	10/23/24	J		
542. SYM CALL		None			Sold	10/23/24	J		
543. SNOW CALL		None			Sold	10/23/24	J		
544. SMCI CALL		None			Sold	10/23/24	J		

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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
545. PENN CALL		None			Sold	10/23/24	J		
546. ON CALL		None			Sold	10/23/24	J		
547. PENN CALL		None			Sold	11/18/24	J		
548. PENN CALL		None			Sold	11/18/24	J		
549. PENN CALL		None			Sold	11/18/24	J		
550. TSM CALL		None			Sold	11/18/24	J		
551. ON CALL		None			Sold	11/28/24	J		
552. SMCI CALL		None			Sold	11/28/24	J		
553. SMCI CALL		None			Sold	11/28/24	J		
554. AKRO CALL		None			Sold	11/28/24	J		
555. DELL CALL		None			Sold	11/22/24	J		
556. NVDA CALL		None			Sold	12/23/24	J		
557. SYM CALL		None			Sold	12/23/24	J		
558. SYM CALL		None			Sold	12/23/24	J		
559. BEAM CALL		None			Sold	12/23/24	J		
560. AMD CALL		None			Sold	12/23/24	J		
561.									

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

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

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

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
562. Account #11 - [redacted] (H)									
563. Anheuser-Busch Inbev ADR (BUD)	A	Dividend			Sold	02/29/24	J		
564. Annaly Capital (NLY) (Y)									
565. BP PLC (BP)	A	Dividend			Sold	02/29/24	J		
566. Canopy Growth (CGC) (Y)									
567. Carnival Corp Paired Shs (CCL)		None	J	T					
568. Coherent Corp (COHR)		None	K	T					
569. Editas Medicine Inc Shs (EDIT)		None			Sold	12/24/24	J		
570. Global X	A	Dividend	J	T	Buy	02/29/24	J		
571. Norweigan Crusie Line (NCLH)		None	J	T					
572. Starbucks Corp (SBUX)	A	Dividend	J	T					
573. Truist Financial Corp (TFC)	A	Dividend	J	T					
574. Vivendi SHS UNSP ADR (VIVHY)	A	Dividend			Sold	02/29/24	J		
575. Calamos Strat Tot Return (CSQ)	A	Dividend	J	T					
576. Invesco (QQQ)	A	Dividend	J	T	Buy (add'l)	12/23/24	J		
577.									
578. Account #12 - [redacted] (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
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
579. Anheuser-Busch Inbev ADR (BUD)	A	Dividend			Sold	02/29/24	J		
580. Annaly Capital (NLY) (Y)									
581. BP PLC (BP)	A	Dividend			Sold	02/29/24	J		
582. Canopy Growth (CGC) (Y)									
583. Carnival Corp Paired Shs (CCL)		None	J	T					
584. Coherent Corp (COHR)		None	K	T					
585. Editas Medicine Inc Shs (EDIT)		None			Sold	12/24/24	J		
586. Global X (MF)	A	Dividend	J	T	Buy	02/29/24	J		
587. Norweigan Crusie Line (NCLH)		None	J	T					
588. Starbucks Corp (SBUX)	A	Dividend	J	T					
589. Truist Financial Corp (TFC)	A	Dividend	J	T					
590. Vivendi SHS UNSP ADR (VIVHY)	A	Dividend			Sold	02/29/24	J		
591. Calamos Strat Tot Return (CSQ)	A	Dividend	J	T					
592. Invesco (QQQ)	A	Dividend	J	T	Buy (add'l)	12/23/24	J		
593.									
594. Account #13 - [redacted] (H)									
595. Anheuser-Busch Inbev ADR (BUD)	A	Dividend			Sold	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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
596. Annaly Capital (NLY) (Y)									
597. BP PLC (BP)	A	Dividend			Sold	02/29/24	J		
598. Canopy Growth (CGC) (Y)									
599. Carnival Corp Paired Shs (CCL)		None	J	T					
600. Coherent Corp (COHR)		None	K	T					
601. Editas Medicine Inc Shs (EDIT)		None			Sold	12/24/24	J		
602. Global X (MF)	A	Dividend	J	T	Buy	02/29/24	J		
603. Norweigan Crusie Line (NCLH)		None	J	T					
604. Starbucks Corp (SBUX)	A	Dividend	J	T					
605. Truist Financial Corp (TFC)	A	Dividend	J	T					
606. Vivendi SHS UNSP ADR (VIVHY)	A	Dividend			Sold	02/29/24	J		
607. Calamos Strat Tot Return (CSQ)	A	Dividend	J	T					
608. Invesco (QQQ)	A	Dividend	J	T	Buy (add'l)	12/23/24	J		
609.									
610. Account #14 - [redacted] (H)									
611. Anheuser-Busch Inbev ADR (BUD)	A	Dividend			Sold	02/29/24	J		
612. Annaly Capital (NLY) (Y)									

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

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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)	
613. BP PLC (BP)	A	Dividend			Sold	02/29/24	J		
614. Canopy Growth (CGC) (Y)									
615. Carnival Corp Paired Shs (CCL)		None	J	T					
616. Coherent Corp (COHR)		None	K	T					
617. Editas Medicine Inc Shs (EDIT)		None			Sold	12/24/24	J		
618. Global X (MF)	A	Dividend	J	T	Buy	02/29/24	J		
619. Norweigan Crusie Line (NCLH)		None	J	T					
620. Starbucks Corp (SBUX)	A	Dividend	J	T					
621. Truist Financial Corp (TFC)	A	Dividend	J	T					
622. Vivendi SHS UNSP ADR (VIVHY)	A	Dividend			Sold	02/29/24	J		
623. Calamos Strat Tot Return (CSQ)	A	Dividend	J	T					
624. Invesco (QQQ)	A	Dividend	J	T	Buy (add'l)	12/23/24	J		
625.									
626. Account #15 - [redacted] (H)									
627. Anheuser-Busch Inbev ADR (BUD)	A	Dividend			Sold	12/24/24	J		
628. Annaly Capital (NLY) (Y)									
629. BP PLC (BP)	A	Dividend			Sold	12/24/24	J		

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

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

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

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
630. Canopy Growth (CGC) (Y)									
631. Carnival Corp Paired Shs (CCL)		None	J	T					
632. Coherent Corp (COHR)		None	K	T					
633. Editas Medicine Inc Shs (EDIT)		None			Sold	12/24/24	J		
634. Global X (MF)	A	Dividend	J	T	Buy	02/29/24	J		
635. Norweigan Crusie Line (NCLH)		None	J	T					
636. Starbucks Corp (SBUX)	A	Dividend	J	T					
637. Truist Financial Corp (TFC)	A	Dividend	J	T					
638. Vivendi SHS UNSP ADR (VIVHY)	A	Dividend	J	T					
639. Calamos Strat Tot Return (CSQ)	A	Dividend	J	T					
640. Invesco (QQQ)	A	Dividend	J	T	Buy (add'l)	12/23/24	J		
641.									
642. Account #16 - [redacted] (H)									
643. Anheuser-Busch Inbev ADR (BUD)	A	Dividend			Sold	02/29/24	J		
644. Annaly Capital (NLY) (Y)									
645. BP PLC (BP)	A	Dividend			Sold	02/29/24	J		
646. Canopy Growth (CGC) (Y)									

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

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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)	
647. Carnival Corp Paired Shs (CCL)		None	J	T					
648. Coherent Corp (COHR)		None	K	T					
649. Editas Medicine Inc Shs (EDIT)		None			Sold	12/24/24	J		
650. Global X (MF)	A	Dividend	J	T	Buy	02/29/24	J		
651. Norweigan Crusie Line (NCLH)		None	J	T					
652. Starbucks Corp (SBUX)	A	Dividend	J	T					
653. Truist Financial Corp (TFC)	A	Dividend	J	T					
654. Vivendi SHS UNSP ADR (VIVHY)	A	Dividend	J	T					
655. Calamos Strat Tot Return (CSQ)	A	Dividend	J	T					
656. Invesco (QQQ)	A	Dividend	J	T	Buy (add'l)	12/23/24	J		
657.									
658. Account #17 - [redacted] (H)									
659. Anheuser-Busch Inbev ADR (BUD)	A	Dividend			Sold	02/29/24	J		
660. Annaly Capital (NLY) (Y)									
661. BP PLC (BP)	A	Dividend			Sold	02/29/24	J		
662. Canopy Growth (CGC) (Y)									
663. Carnival Corp Paired Shs (CCL)		None	J	T					

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

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

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

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
664. Coherent Corp (COHR)		None	K	T					
665. Editas Medicine Inc Shs (EDIT)		None			Sold	12/24/24	J		
666. Global X (MF)	A	Dividend	J	T	Buy	02/29/24	J		
667. Norweigan Crusie Line (NCLH)		None	J	T					
668. Starbucks Corp (SBUX)	A	Dividend	J	T					
669. Truist Financial Corp (TFC)	A	Dividend	J	T					
670. Valero Energy Corp (VLO)	A	Dividend	J	T					
671. Calamos Strat Tot Return (CSQ)	A	Dividend	J	T					
672. Invesco (QQQ)	A	Dividend	J	T	Buy (add'l)	12/23/24	J		
673.									
674. Account #18 - [redacted] (H)									
675. Carnival Corp (CCL)		None	J	T					
676. Exxon Mobil (XOM)	A	Dividend	J	T					
677. Truist Financial Corp (TFC)	A	Dividend	J	T					
678. Calamos Strat Tot Return (CSQ)	A	Dividend	J	T					
679.									
680. Account #19 - [redacted] (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
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Moody, Jr., James S.	04/14/2025

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)	
681. ML Bank Deposit Program	G	Int./Div.	P1	T					
682. AGNC Investment Corp (AGNC)	E	Dividend			Sold	06/13/24	M		
683. Akoutis Technologies Inc (AKTS)		None	J	T					
684. Annaly Capital Management, Inc (NLY)	E	Dividend			Sold	07/15/24	M	E	
685. Applovin Corp (APP)		None			Sold	05/03/24	L		
686. Ares Capital Corporation (ARCC)	E	Dividend	N	T					
687. Broadcom Inc (AVGO)	D	Dividend	N	T					
688. Canopy Growth Corp (CGC)		None			Sold	03/22/24	J		
689. Costco Wholesale Corp (COST)	D	Dividend	N	T	Buy	07/17/24	N		
690. Kinder Morgan Inc (KMI)	E	Dividend	M	T					
691. Nkarta Inc (NKTX)		None			Sold	07/15/24	J		
692. Solid Biosciences Inc (SLBD)		None			Sold	06/12/24	J		
693. Two Harbors Investment Corp (TWO)	D	Dividend			Sold	05/03/24	L		
694. Valero Energy Corporation (VLO)	C	Dividend	M	T	Sold (part)	12/30/24	J		
695. Zuora Inc (ZUO)		None			Sold	06/06/24	K		
696. Calamos (CSQ)	E	Dividend			Sold	05/21/24	M	E	
697. Columbia Dividend	D	Dividend			Sold	04/26/24	N	F	

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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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)	
698. Columbia Global Tech (MF)		None	O	T	Buy	04/29/24	L		
699.					Buy	08/05/24	L		
700. Columbia Large Cap (MF)		None	N	T	Buy (add'l)	07/17/24	N		
701. Columbia Seligman Tech (MF)		None	N	T	Buy	04/29/24	N		
702.					Buy (add'l)	08/05/24	L		
703. Fidelity Energy Index (MF)	A	Dividend			Buy	05/29/24	K		
704.					Sold	06/24/24	M		
705. Fidelity Information Tech Index (MF)	B	Dividend	N	T	Buy	05/30/24	N		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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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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Moody, Jr., James S.	04/14/2025

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

Part VII, line 3: This entry represents a limited partnership interest. The entity was duly registered in the state of Florida. Its business offices and operations are located in another state and run by an individual whose information is not subject to this disclosure.
All holdings in which the filer, or any other individual subject to this disclosure, has a personal ownership share are separately identified in Part VII.

Part VII, Column B: Lines reflecting no income are so reported because none (no income) was attributed to those particular holdings during the reporting period.

Each put or call transaction is an independent contract creating the right, but not the obligation, to make future sales or purchases of specific assets. They are not fixed assets, therefore either purchases or sales of individual puts and calls can be used to either open or close contracts; they do not generate income. Options devalue based upon market conditions and expiration dates, therefore they routinely do not have value at the end of a reporting period; this occurs without any type of reportable transaction. Those options which have value at the end of the reporting period are reflected accordingly in Column C. Purchases and sales of any optioned holdings are reported separately from these contracts.

Part VII: I am providing all information to be fully transparant and in compliance of the statute. The report is organized by listing the assets of each account as of 12/31/2023 together with the transactions involving those assets that accrued during the year. All other transactions are listed at the end of the report (lines 385-821).

Part VII: (Y) represents an asset that is unreportable.

Name of Person Reporting	Date of Report
Moody, Jr., James S.	04/14/2025

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/ James S. Moody, Jr.

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
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544