Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Morrison, Sarah Daggett
U.S. District Court - Ohio Southern
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/ Morrison, Sarah Daggett [electronically signed on Sep 29, 2026 4:49pm by Morrison, Sarah Daggett in JEFS]
/s/ Morrison, Sarah Daggett [electronically signed on Sep 1, 2026 12:02pm by Morrison, Sarah Daggett in JEFS]

I. Positions

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

II. Agreements

	EMPLOYER OR PARTY NAME	TERMS	AGREEMENT START MONTH	AGREEMENT START YEAR
1.	Ohio Public Employees Retirement Plan	Defined Benefit Pension Plan	March	1991

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

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	Janney Montgomery Scott	Fees	No	$0.00	

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.	USAA BANK (cash)	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
1-B.	HUNTINGTON BANK (cash)	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
2.	**(H) ACCOUNT #1**				
2-A.	JANNEY INSURED SWEEP (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
2-B.	VANGUARD FEDERAL MONEY MARKET INVESTOR CL (VMFXX)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 13, 2025	$100,001 - $250,000
(2).	Sold (part)	Jan 17, 2025	$100,001 - $250,000
(3).	Sold (part)	Jan 23, 2025	$15,001 - $50,000
(4).	Sold (part)	Feb 4, 2025	$15,000 or less
(5).	Buy (add'l)	Apr 17, 2025	$15,001 - $50,000
(6).	Sold (part)	Apr 21, 2025	$15,001 - $50,000

2-C.	ALPHABET INC CL C (GOOG)	$15,001 - $50,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,000 or less
(2).	Sold (part)	Oct 29, 2025	$15,001 - $50,000

2-D.	ALPHABET INC Cl A (GOOGL)	$15,001 - $50,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,000 or less
(2).	Sold (part)	Oct 29, 2025	$15,001 - $50,000

2-E.	AMAZON.COM INC (AMZN)		None	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 21, 2025	$15,001 - $50,000

2-F.	APPLE INC (AAPL)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
2-G.	APPLIED MATERIALS INC (AMAT)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 23, 2025	$15,001 - $50,000

2-H.	ARCH CAPITAL GROUP LTD (ACGL)		None	$50,001 - $100,000	Cash/Market
2-I.	BROADCOM INC (AVGO)	$15,001 - $50,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 29, 2025	$15,001 - $50,000

2-J.	CAPITAL ONE FINANCIAL CORP (COF)	$1,000 or less	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	Sep 17, 2025	$50,001 - $100,000

2-K.	CHEVRON CORP (CVX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-L.	CIGNA CORP NEW (CI)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-M.	COSTCO WHOLESALE CORP (COST)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
2-N.	ELI LILLY & CO(LLY)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
2-O.	EXXON MOBIL CORP (XOM)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-P.	META PLATFORMS (META)	$15,001 - $50,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 5, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Mar 21, 2025	$50,001 - $100,000

2-Q.	MGM RESORTS INTL (MGM)		None	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 10, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Oct 16, 2025	$15,001 - $50,000
(3).	Buy (add'l)	Oct 29, 2025	$15,001 - $50,000

2-R.	RTX CORP (RTX)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
2-S.	WALMART INC (WMT)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
2-T.	WELLS FARGO & CO NEW (WFC)	$15,001 - $50,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,001 - $50,000

2-U.	MPLX LTD (MPLX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
2-V.	JPMORGAN 100% US TREAS SECS MMKT PREMIER CL (VHPXX)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jan 8, 2025	$100,001 - $250,000

2-W.	FISERV INC (FISV)	$15,001 - $50,000	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 4, 2025	$15,001 - $50,000
(2).	Sold	Oct 29, 2025	$15,001 - $50,000

2-X.	INTEL CORP (INTC)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jan 8, 2025	$15,001 - $50,000

2-Y.	LVMH MOET HENNESSY LOUIS VUITTON ADR (LVMUY)	$1,001 - $2,500	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 17, 2025	$15,001 - $50,000
(2).	Sold (part)	Jun 10, 2025	$15,001 - $50,000
(3).	Sold	Jun 26, 2025	$15,001 - $50,000

2-Z.	OCCIDENTAL PETROLEUM CORP (OXY)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Sep 16, 2025	$15,001 - $50,000

2-AA.	PEPSICO INC (PEP)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jan 29, 2025	$15,001 - $50,000

2-AB.	ZOETIS INC CL A (ZTS)	$1,000 or less	Dividend		

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

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
2-AC.	DAVIS FUNDAMENTAL SELECT US EQUITY (DUSA)	$100,001 - $1,000,000	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jan 29, 2025	$250,001 - $500,000

2-AD.	QUEST DIAGNOSTICS INC (DGX)	$5,001 - $15,000	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jan 29, 2025	$15,001 - $50,000

2-AE.	TECK RESOURCES LTD CL B (TECK)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jan 29, 2025	$15,001 - $50,000

2-AF.	LULULEMON ATHLETICA INC (LULU)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 17, 2025	$50,001 - $100,000
(2).	Sold	Sep 16, 2025	$15,001 - $50,000

2-AG.	CHARLES RIVER LAB INTL INC (CRL)	$1,000 or less	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 4, 2025	$15,001 - $50,000
(2).	Sold	Nov 5, 2025	$15,001 - $50,000

2-AH.	VERMILION ENERGY INC (VET)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 4, 2025	$15,001 - $50,000
(2).	Sold	Apr 16, 2025	$15,000 or less

3.	**(H) ACCOUNT #2**				
3-A.	ALIBABA GROUP HOLDING LTD SPONS ADS REPSTG 8 ORD SHS (BABA)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
4.	**(H) ACCOUNT #3**				
4-A.	ALPHABET INC CL A (GOOGL)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
4-B.	AMAZON.COM INC (AMZN)		None	$15,000 or less	Cash/Market
5.	**(H) ACCOUNT #4**				
5-A.	ALPHABET INC CL A (GOOGL)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
5-B.	APPLE INC (AAPL)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
5-C.	APPLIED MATERIALS INC (AMAT)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 31, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Feb 13, 2025	$15,001 - $50,000

5-D.	CHUBB LTD (CB)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
5-E.	WHEELS UP EXPERIENCE INC CL A (UP)		None	$15,000 or less	Cash/Market
5-F.	HALLIBURTON COMPANY (HAL)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 4, 2025	$15,001 - $50,000

6.	**(H) ACCOUNT #5**				
6-A.	JANNEY INSURED SWEEP (cash)	$1,000 or less	Interest		

Additional Explanation: This asset did not have a reportable value at the end of the reporting period without a corresponding reportable transaction. There was over $200 of interest paid in 2025.

6-B.	ALPHABET INC CL C (GOOG)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
6-C.	AMAZON.COM INC (AMZN)		None	$50,001 - $100,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 6, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 7, 2025	$15,000 or less
(3).	Buy (add'l)	Apr 21, 2025	$15,001 - $50,000

6-D.	AMERICAN INTL GROUP INC (AIG)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
6-E.	APPLE INC (AAPL)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 17, 2025	$15,001 - $50,000

6-F.	ARCH CAPITAL GROUP LTD (ACGL)		None	$15,001 - $50,000	Cash/Market
6-G.	ASML HOLDING NV (ASML)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 6, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Jan 14, 2025	$15,001 - $50,000
(3).	Buy (add'l)	Jan 17, 2025	$15,001 - $50,000

6-H.	BERKLEY WR CORP (WRB)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

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

6-I.	BERKSHIRE HATHWAY IN CL B (BRK/B)		None	$50,001 - $100,000	Cash/Market
6-J.	BRITISH AMERICAN TOBACCO PLC (BTI)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
6-K.	BROADCOM INC (AVGO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
6-L.	DOVER CORP (DOV)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 11, 2025	$15,001 - $50,000

6-M.	MGM RESORTS INTL (MGM)		None	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 10, 2025	$15,001 - $50,000

6-N.	NVIDIA CORP (NVDA)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

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

6-O.	PHILIP MORRIS INTL INC (PM)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
6-P.	TESLA INC (TSLA)		None	$50,001 - $100,000	Cash/Market
6-Q.	LVMH MOET HENNESSY LOUIS VUITTON ADR (LVMUY)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jun 10, 2025	$15,001 - $50,000

6-R.	WEST FRAISER TIMBER (WFG)	$1,000 or less	Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jun 24, 2025	$15,001 - $50,000

6-S.	NATURAL RESOURCE PARTNERS LP (NRP)	$1,000 or less	Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jun 24, 2025	$15,001 - $50,000

6-T.	CHARLES RIVER LAB INTL INC (CRL)		None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 4, 2025	$15,001 - $50,000
(2).	Sold (part)	Jun 24, 2025	$15,000 or less
(3).	Sold	Nov 6, 2025	$15,001 - $50,000

7. **(H) ACCOUNT #6**

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
7-A.	JANNEY INSURED SWEEP (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
7-B.	VANGUARD FEDERAL MONEY MARKET INV CL (VMFXX) (cash eq.)	$5,001 - $15,000	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 3, 2025	$15,001 - $50,000
(2).	Sold (part)	Apr 11, 2025	$50,001 - $100,000
(3).	Sold (part)	May 2, 2025	$15,001 - $50,000
(4).	Sold (part)	Jun 20, 2025	$50,001 - $100,000
(5).	Sold (part)	Sep 17, 2025	$15,000 or less
(6).	Sold (part)	Oct 10, 2025	$15,001 - $50,000
(7).	Sold	Oct 27, 2025	$50,001 - $100,000

8.	**(H) ACCOUNT #7**				
8-A.	AMERICAN FUNDS GROWTH FUND OF AMERICA 529-A (CGFAX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
9.	**(H) ACCOUNT #8**				
9-A.	AMERICAN FUNDS GROWTH FUND OF AMERICA 529-A (CGFAX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

VIII. Additional Information or Explanations

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