**Annual, 2025**

## Financial Disclosure Report (AO Form 10)

**Filer's Information**
**Murphy, John F**
U.S. District Court - Pennsylvania Eastern
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/ Murphy, John F [electronically signed on Jun 29, 2026 1:18pm by Murphy, John F in JEFS]**
**/s/ Murphy, John F [electronically signed on May 28, 2026 6:35pm by Murphy, John F in JEFS]**

### I. Positions

| | ORGANIZATION/ENTITY NAME | ORGANIZATION/ENTITY TYPE | POSITION HELD |
|---|---|---|---|
| 1. | Rutgers Law School | University/College | Adjunct Professor |
| 2. | Villanova Law School | University/College | Adjunct Professor |

### II. Agreements

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

### III A. Filer Non-Investment Income

| | SOURCE | INCOME TYPE | INCOME AMOUNT | HONORARIUM DATE |
|---|---|---|---|---|
| 1. | Villanova Law School | Teaching Income | $3,810.00 | |

### III B. Spouse Non-Investment Income

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

### IV. Reimbursements

| | SOURCE OF REIMBURSEMENT | FROM DATE | TO DATE | LOCATION | PURPOSE | ITEMS PAID OR PROVIDED |
|---|---|---|---|---|---|---|
| 1. | University of Pennsylvania Carey Law School and Waseda University School of Law | May 21, 2025 | May 25, 2025 | Tokyo, Japan | Speaker in the annual Global Patent Law Conference | Airfare, hotel, meals |

| | SOURCE OF REIMBURSEMENT | FROM DATE | TO DATE | LOCATION | PURPOSE | ITEMS PAID OR PROVIDED |
|---|---|---|---|---|---|---|
| 2. | The Naples Roundtable Institute | Feb 16, 2025 | Feb 18, 2025 | Naples, Florida | Participant in annual Naples Roundtable Conference | Airfare, hotel, meals, local transportation |
| 3. | New York Intellectual Property Law Association | Mar 21, 2025 | Mar 22, 2025 | New York, New York | Attendance to NYIPLA Annual Dinner in Honor of the Federal Judiciary | Train, hotel, meal |
| 4. | Federal Circuit Bar Association | Jun 17, 2025 | Jun 21, 2025 | Napa Valley, California | Speaker at annual Bench and Bar Conference | Airfare, hotel, meals, local transportation |

## V. Gifts

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

## VI. Liabilities

| | CREDITOR NAME | TYPE OF LIABILITY | VALUE |
|---|---|---|---|
| 1. | Education Financial Services | Student Loan | $15,001 - $50,000 |

## VII. Investments and Trusts

| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 1. | **(H) 529** | | | | |
| 1-A. | American Funds College 2027 Fund (CTSCX) | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Distributed (part) Jan 3, 2025 $15,000 or less | | | | |
| 1-B. | American Funds College 2030 Fund (CTHFX) | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Distributed (part) Jan 3, 2025 $15,000 or less | | | | |
| 1-C. | American Funds College Enrollment Fund (FAADX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Distributed (part) Jan 13, 2025 $15,001 - $50,000 | | | | |
| | (2). Distributed (part) Jul 14, 2025 $15,001 - $50,000 | | | | |
| 1-D. | New Perspective Fund (24) (FFPNX) | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Distributed (part) Jan 13, 2025 $15,000 or less | | | | |
| | (2). Distributed (part) Jul 14, 2025 $15,000 or less | | | | |
| 1-E. | New Perspective Fund (27) (FFPNX) | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Distributed (part) Jan 3, 2025 $15,000 or less | | | | |
| 1-F. | New Perspective Fund (30) (FFPNX) | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Distributed (part) Jan 3, 2025 $15,000 or less | | | | |
| 2. | **AAPL, Apple Inc.** | $5,001 - $15,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |

| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 3. | **Alphabet/Google** | $2,501 - $5,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |
| 4. | **AMAT, APPLIED MATERIALS INC /DE** | $1,001 - $2,500 | Dividend | $250,001 - $500,000 | Cash/Market |
| 5. | **AMGN, AMGEN INC** | $5,001 - $15,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 6. | **AMZN, AMAZON COM INC** | | None | $500,001 - $1,000,000 | Cash/Market |
| 7. | **AMZU** | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 8. | **BRISTOL MYERS SQUIBB CO.** | $5,001 - $15,000 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jul 9, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 9. | **BRK-B, BERKSHIRE HATHAWAY INC** | | None | $15,001 - $50,000 | Cash/Market |
| 10. | **(H) Certain Trust** | | | | |
| 10-A. | AAPL, Apple Inc. | $2,501 - $5,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Jan 1, 2025 | $50,001 - $100,000 |
| (2). | Buy (add'l) | Jun 24, 2025 | $50,001 - $100,000 |
| (3). | Buy (add'l) | Jun 25, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-B. | ABT, ABBOTT LABORATORIES | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-C. | ACN, Accenture plc | $2,501 - $5,000 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jul 21, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-D. | ADBE, ADOBE INC. | | None | $50,001 - $100,000 | Cash/Market |
| 10-E. | AFL, AFLAC INC | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-F. | ALL, ALLSTATE CORP | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-G. | Alphabet/Google | $1,001 - $2,500 | Dividend | $500,001 - $1,000,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Jul 21, 2025 | $100,001 - $250,000 |
| (2). | Buy (add'l) | Aug 5, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-H. | AME, AMETEK INC/ | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-I. | AMGN, AMGEN INC | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-J. | AMP, AMERIPRISE FINANCIAL INC | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-K. | AMZN, AMAZON COM INC | | None | $500,001 - $1,000,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Jun 11, 2025 | $100,001 - $250,000 |
| (2). | Buy (add'l) | Jun 24, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-L. | AMZY | $5,001 - $15,000 | Dividend | $50,001 - $100,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Jun 11, 2025 | $15,001 - $50,000 |
| (2). | Buy (add'l) | Jul 28, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-M. | APD, Air Products & Chemicals, Inc. | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 10-N. | APH, AMPHENOL CORP /DE/ | $2,501 - $5,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |
| 10-O. | ASTS, AST SpaceMobile, Inc. | | None | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Aug 5, 2025 | $15,001 - $50,000 |
| (2). | Sold | Nov 19, 2025 | $15,001 - $50,000 |



| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 10-P. | AVGO, Broadcom Inc. | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Jul 9, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-Q. | BKNG | $2,501 - $5,000 | Dividend | $250,001 - $500,000 | Cash/Market |
| 10-R. | BLK, BlackRock, Inc. | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-S. | CHD, CHURCH & DWIGHT CO INC /DE/ | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-T. | CHUBB | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-U. | CMI, CUMMINS INC | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-V. | Colgate Palmolive | $1,001 - $2,500 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Aug 11, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-W. | Comcast | $5,001 - $15,000 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jun 11, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-X. | Constellation Energy | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Aug 5, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-Y. | CSCO, CISCO SYSTEMS, INC. | $5,001 - $15,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-Z. | CVX, CHEVRON CORP | $5,001 - $15,000 | Dividend | $250,001 - $500,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Jul 21, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-AA. | Danaher | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Mar 24, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-AB. | DFA International Core Equity | $2,501 - $5,000 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jun 24, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-AC. | DGX, QUEST DIAGNOSTICS INC | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-AD. | Dollar General | $1,001 - $2,500 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jun 11, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-AE. | DTE Energy | $1,001 - $2,500 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jul 8, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-AF. | EG, EVEREST GROUP, LTD. | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-AG. | ETN, Eaton Corp plc | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-AH. | Exelon | $2,501 - $5,000 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jun 11, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-AI. | FZCxX | $5,001 - $15,000 | Interest | $250,001 - $500,000 | Cash/Market |
| 10-AJ. | Glenmede Quant US Large Cap Core Equity Fund | $2,501 - $5,000 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jun 23, 2025 | $500,001 - $1,000,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-AK. | GOOG | $1,001 - $2,500 | Dividend | $500,001 - $1,000,000 | Cash/Market |
| 10-AL. | GPC, GENUINE PARTS CO | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 10-AM. | GPN, GLOBAL PAYMENTS INC | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-AN. | GQG Emerging Markets Equity Fund | $2,501 - $5,000 | Dividend | | |



| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 11, 2025 $100,001 - $250,000 | | | | |
| 10-AO. | HARTFORD SCHRODERS INTL MULTI- CAP VAL FD | $2,501 - $5,000 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 11, 2025 $100,001 - $250,000 | | | | |
| 10-AP. | HD, HOME DEPOT, INC. | $5,001 - $15,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-AQ. | HSY, HERSHEY CO | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 10-AR. | ISHARES CORE MSCI EMERGING MARKETS | $5,001 - $15,000 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 11, 2025 $500,001 - $1,000,000 | | | | |
| 10-AS. | ISHARES MSCI JAPAN INDEX FD | $2,501 - $5,000 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 25, 2025 $50,001 - $100,000 | | | | |
| 10-AT. | iShares Small-Cap Growth | $2,501 - $5,000 | Dividend | $250,001 - $500,000 | Cash/Market |
| 10-AU. | ISRG, INTUITIVE SURGICAL INC | | None | $100,001 - $250,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jul 8, 2025 $50,001 - $100,000 | | | | |
| | (2). Buy (add'l) Jul 9, 2025 $50,001 - $100,000 | | | | |
| 10-AV. | IT, GARTNER INC | | None | $50,001 - $100,000 | Cash/Market |
| 10-AW. | ITW, ILLINOIS TOOL WORKS INC | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 10-AX. | JEPI | $50,001 - $100,000 | Dividend | $15,001 - $50,000 | Cash/Market |
| 10-AY. | JEPI | $50,001 - $100,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jun 12, 2025 $250,001 - $500,000 | | | | |
| | (2). Buy (add'l) Jun 20, 2025 $100,001 - $250,000 | | | | |
| | (3). Buy (add'l) Jun 25, 2025 $100,001 - $250,000 | | | | |
| | (4). Buy (add'l) Jul 21, 2025 $100,001 - $250,000 | | | | |
| | (5). Buy (add'l) Aug 19, 2025 $100,001 - $250,000 | | | | |
| 10-AZ. | JEPQ | $50,001 - $100,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jun 11, 2025 $250,001 - $500,000 | | | | |
| | (2). Buy (add'l) Jun 25, 2025 $100,001 - $250,000 | | | | |
| | (3). Buy (add'l) Aug 19, 2025 $50,001 - $100,000 | | | | |
| 10-BA. | JOHNSON JOHNSON | $1,001 - $2,500 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 25, 2025 $50,001 - $100,000 | | | | |
| 10-BB. | JPM | $5,001 - $15,000 | Dividend | $250,001 - $500,000 | Cash/Market |
| 10-BC. | LH, LABCORP HOLDINGS INC. | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-BD. | LLY, ELI LILLY & Co | $2,501 - $5,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Aug 7, 2025 $50,001 - $100,000 | | | | |
| 10-BE. | LYB, LyondellBasell Industries N.V. | $2,501 - $5,000 | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jun 25, 2025 $50,001 - $100,000 | | | | |
| 10-BF. | MA, Mastercard Inc | $1,001 - $2,500 | Dividend | $250,001 - $500,000 | Cash/Market |
| 10-BG. | MCD, MCDONALDS CORP | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-BH. | MDT, Medtronic plc | $1,001 - $2,500 | Dividend | | |

| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 11, 2025 $50,001 - $100,000 | | | | |
| 10-BI. | MICROSOFT | $2,501 - $5,000 | Dividend | $250,001 - $500,000 | Cash/Market |
| 10-BJ. | MLM, MARTIN MARIETTA MATERIALS INC | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-BK. | Mondelez Intl Inc. | $1,001 - $2,500 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 11, 2025 $15,001 - $50,000 | | | | |
| 10-BL. | MS, MORGAN STANLEY | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-BM. | NFLX, NETFLIX INC | | None | $250,001 - $500,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jun 11, 2025 $100,001 - $250,000 | | | | |
| | (2). Buy (add'l) Jun 24, 2025 $50,001 - $100,000 | | | | |
| | (3). Buy (add'l) Jun 25, 2025 $50,001 - $100,000 | | | | |
| | (4). Buy (add'l) Jul 9, 2025 $100,001 - $250,000 | | | | |
| 10-BN. | Northern Trust Corp. | $1,001 - $2,500 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Aug 11, 2025 $50,001 - $100,000 | | | | |
| 10-BO. | NTAP, NetApp, Inc. | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-BP. | NTRS, NORTHERN TRUST CORP | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-BQ. | NVDA, NVIDIA CORP | $1,000 or less | Dividend | $500,001 - $1,000,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jun 11, 2025 $100,001 - $250,000 | | | | |
| | (2). Buy (add'l) Jun 24, 2025 $100,001 - $250,000 | | | | |
| | (3). Buy (add'l) Jun 26, 2025 $50,001 - $100,000 | | | | |
| | (4). Buy (add'l) Jul 9, 2025 $100,001 - $250,000 | | | | |
| 10-BR. | NVDY | $5,001 - $15,000 | Dividend | $50,001 - $100,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jun 11, 2025 $15,001 - $50,000 | | | | |
| | (2). Buy (add'l) Jul 28, 2025 $15,001 - $50,000 | | | | |
| 10-BS. | NVO, NOVO NORDISK A S | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jun 25, 2025 $100,001 - $250,000 | | | | |
| | (2). Buy (add'l) Jul 9, 2025 $50,001 - $100,000 | | | | |
| | (3). Buy (add'l) Aug 8, 2025 $50,001 - $100,000 | | | | |
| 10-BT. | Old Dominion Freight Line | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Nov 13, 2025 $100,001 - $250,000 | | | | |
| 10-BU. | ORCL, ORACLE CORP | $2,501 - $5,000 | Dividend | $250,001 - $500,000 | Cash/Market |
| 10-BV. | PAYX, PAYCHEX INC | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 10-BW. | PDI, PIMCO Dynamic Income Fund | $5,001 - $15,000 | Dividend | $50,001 - $100,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jun 25, 2025 $50,001 - $100,000 | | | | |
| 10-BX. | PEPSICO INC. | $5,001 - $15,000 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jul 9, 2025 $100,001 - $250,000 | | | | |
| 10-BY. | PFIZER INC. | $1,001 - $2,500 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Aug 22, 2025 $15,001 - $50,000 | | | | |
| 10-BZ. | PG | $1,001 - $2,500 | Dividend | | |



| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 11, 2025 $50,001 - $100,000 | | | | |
| 10-CA. | PH, Parker-Hannifin Corp | $2,501 - $5,000 | Dividend | $250,001 - $500,000 | Cash/Market |
| 10-CB. | PNC, PNC FINANCIAL SERVICES GROUP, INC. | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-CC. | PPG INDUSTRIES INC. | $2,501 - $5,000 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jul 21, 2025 $100,001 - $250,000 | | | | |
| 10-CD. | PSX, Phillips 66 | $2,501 - $5,000 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-CE. | REGN, REGENERON PHARMACEUTICALS, INC. | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jun 11, 2025 $50,001 - $100,000 | | | | |
| | (2). Buy (add'l) Jul 9, 2025 $50,001 - $100,000 | | | | |
| 10-CF. | ROK, ROCKWELL AUTOMATION, INC | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-CG. | ROSS STORES INC | $1,001 - $2,500 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Aug 5, 2025 $100,001 - $250,000 | | | | |
| 10-CH. | RTX, RTX Corp | $5,001 - $15,000 | Dividend | $250,001 - $500,000 | Cash/Market |
| 10-CI. | SBUX, STARBUCKS CORP | $1,001 - $2,500 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 27, 2025 $15,001 - $50,000 | | | | |
| 10-CJ. | SCHW, SCHWAB CHARLES CORP | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-CK. | SMR, NUSCALE POWER Corp | | None | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Aug 5, 2025 $15,001 - $50,000 | | | | |
| | (2). Sold Nov 17, 2025 $15,000 or less | | | | |
| 10-CL. | SNA, Snap-on Inc | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-CM. | SYK, STRYKER CORP | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-CN. | TEL, TE Connectivity plc | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 10-CO. | TROW, PRICE T ROWE GROUP INC | $2,501 - $5,000 | Dividend | $50,001 - $100,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jun 25, 2025 $50,001 - $100,000 | | | | |
| 10-CP. | TXN, TEXAS INSTRUMENTS INC | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-CQ. | UBER | | None | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Aug 5, 2025 $15,001 - $50,000 | | | | |
| 10-CR. | ULTA | | None | $100,001 - $250,000 | Cash/Market |
| 10-CS. | UNH, UNITEDHEALTH GROUP INC | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 11, 2025 $15,001 - $50,000 | | | | |
| 10-CT. | UNP, UNION PACIFIC CORP | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-CU. | UsBancorp | $1,001 - $2,500 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 11, 2025 $50,001 - $100,000 | | | | |
| 10-CV. | Vanguard Develeoped Markets | $5,001 - $15,000 | Dividend | $100,001 - $250,000 | Cash/Market |



| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 13, 2025 | $250,001 - $500,000 |
| (2). | Sold (part) | Jul 9, 2025 | $100,001 - $250,000 |
| (3). | Sold (part) | Aug 11, 2025 | $50,001 - $100,000 |
| (4). | Sold (part) | Aug 22, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-CW. | Vanguard FTSE Developed Markets Fund | $15,001 - $50,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 13, 2025 | $250,001 - $500,000 |
| (2). | Sold (part) | Jul 9, 2025 | $100,001 - $250,000 |
| (3). | Sold (part) | Aug 11, 2025 | $50,001 - $100,000 |
| (4). | Sold (part) | Aug 22, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-CX. | VANGUARD GLOBAL EX US REAL ESTATE | $2,501 - $5,000 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jul 21, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-CY. | Vanguard Real Estate | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 10-CZ. | Vanguard Small-Cap Index | $5,001 - $15,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jul 28, 2025 | $100,001 - $250,000 |
| (2). | Sold (part) | Dec 16, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-DA. | Vanguard Small Cap Value | $5,001 - $15,000 | Dividend | $250,001 - $500,000 | Cash/Market |
| 10-DB. | VANGUARD SMALL - CAP VALUE ETF | $2,501 - $5,000 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jun 25, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-DC. | VRT, Vertiv Holdings Co | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Aug 5, 2025 | $15,001 - $50,000 |
| (2). | Buy (add'l) | Aug 11, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-DD. | WAT, WATERS CORP /DE/ | | None | $100,001 - $250,000 | Cash/Market |
| 10-DE. | WCM FOCUSED INTERNATIONAL GROWTH FUND | $1,001 - $2,500 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jul 9, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-DF. | Yieldmax Ultra Option Income | $15,001 - $50,000 | Dividend | | |

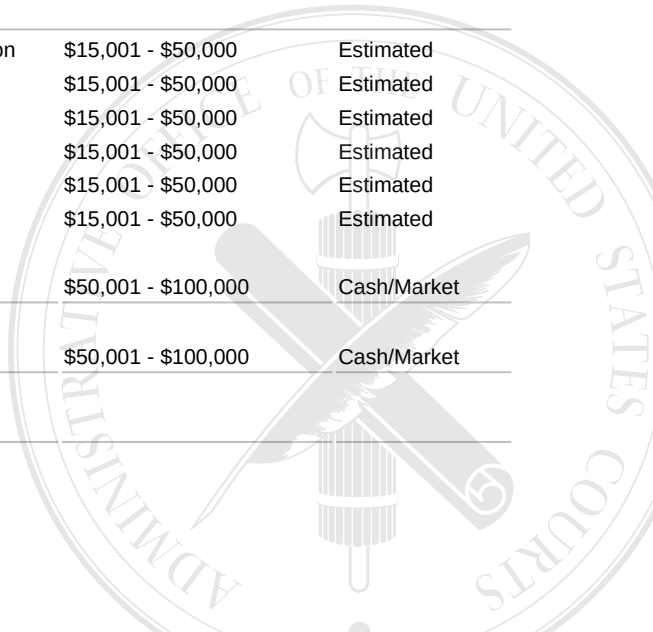
| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Jun 25, 2025 | $15,001 - $50,000 |
| (2). | Buy (add'l) | Jul 21, 2025 | $15,001 - $50,000 |
| (3). | Buy (add'l) | Jul 28, 2025 | $50,001 - $100,000 |
| (4). | Sold | Dec 16, 2025 | $100,001 - $250,000 |

| | | | | | |
|---|---|---|---|---|---|
| 10-DG. | Zoetis Inc. | $1,001 - $2,500 | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jul 21, 2025 | $50,001 - $100,000 |

| | | | | | |
|---|---|---|---|---|---|
| 11. | **CURE** | $1,001 - $2,500 | Dividend | $250,001 - $500,000 | Cash/Market |
| 12. | **DE, DEERE & CO** | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 13. | **DFEN** | $1,001 - $2,500 | Dividend | $250,001 - $500,000 | Cash/Market |
| 14. | **Direxion Trust Daily TSLA 2x ET** | $2,501 - $5,000 | Dividend | | |

| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jan 13, 2025 $15,001 - $50,000 | | | | |
| 15. | **EG, EVEREST GROUP, LTD.** | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 16. | **FCASH** | $1,001 - $2,500 | Interest | $50,001 - $100,000 | Cash/Market |
| 17. | **FCX, FREEPORT-MCMORAN INC** | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 18. | **FDRXX** | $1,001 - $2,500 | Interest | $50,001 - $100,000 | Cash/Market |
| 19. | **FENY** | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |
| 20. | **Fidelity MSCI Financial ETF** | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 21. | **Fidelity MSCI Healthcare Index ETF** | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Oct 20, 2025 $50,001 - $100,000 | | | | |
| 22. | **Fidelity MSCI Industrial ETF** | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| 23. | **Fidelity MSCi InfoTech** | $1,000 or less | Dividend | $250,001 - $500,000 | Cash/Market |
| 24. | **Fidelity National Information Services** | $1,001 - $2,500 | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 25, 2025 $50,001 - $100,000 | | | | |
| 25. | **FTABX** | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 26. | **FZCXX** | $1,000 or less | Interest | $15,000 or less | Cash/Market |
| 27. | **GOOG, Alphabet Inc.** | $2,501 - $5,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |
| 28. | **HD, HOME DEPOT, INC.** | $5,001 - $15,000 | Dividend | $15,001 - $50,000 | Cash/Market |
| 29. | **IHI** | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 30. | **IJH** | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 31. | **(H) Independence Alternative Investments** | | | | |
| 31-A. | Independence AFC LLC | $1,001 - $2,500 | Distribution | $15,001 - $50,000 | Estimated |
| 31-B. | Independence CV3 LLC | | None | $15,001 - $50,000 | Estimated |
| 31-C. | Independence CV LLC | | None | $15,001 - $50,000 | Estimated |
| 31-D. | Independence KOPBC LLC | | None | $15,001 - $50,000 | Estimated |
| 31-E. | Independence Tusk LLC | | None | $15,001 - $50,000 | Estimated |
| 31-F. | So Cal Whittier LLC | | None | $15,001 - $50,000 | Estimated |
| 32. | **INTC, INTEL CORP** | | None | $50,001 - $100,000 | Cash/Market |
| 33. | **INTU, INTUIT INC.** | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 34. | **iShares Biotech ETF** | $1,000 or less | Dividend | | |



| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Jun 27, 2025 $50,001 - $100,000 | | | | |
| 35. | **IVE** | $2,501 - $5,000 | Dividend | $250,001 - $500,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Sep 5, 2025 $50,001 - $100,000 | | | | |
| 36. | **JPM** | $5,001 - $15,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 37. | **KMB, KIMBERLY CLARK CORP** | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 38. | **KO, COCA COLA CO** | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 39. | **KVUE, Kenvue Inc.** | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 40. | **MCD, MCDONALDS CORP** | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 41. | **MICROSOFT** | $5,001 - $15,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| 42. | **MU, MICRON TECHNOLOGY INC** | $1,000 or less | Dividend | $250,001 - $500,000 | Cash/Market |
| 43. | **NFLX, NETFLIX INC** | $1,000 or less | Dividend | $500,001 - $1,000,000 | Cash/Market |
| 44. | **NVDA, NVIDIA CORP** | $1,001 - $2,500 | Dividend | $1,000,001 - $5,000,000 | Cash/Market |
| 45. | **PG, PROCTER & GAMBLE Co** | $2,501 - $5,000 | Dividend | $15,001 - $50,000 | Cash/Market |
| 46. | **QQQ, INVESCO QQQ TRUST, SERIES 1** | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 47. | **REGN, REGENERON PHARMACEUTICALS, INC.** | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 48. | **SOXL** | | None | $500,001 - $1,000,000 | Cash/Market |
| 49. | **SOXX** | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 50. | **SPXL** | $2,501 - $5,000 | Dividend | $500,001 - $1,000,000 | Cash/Market |
| 51. | **STARBUCKS CORP.** | $1,001 - $2,500 | Dividend | $15,001 - $50,000 | Cash/Market |
| 52. | **TECL** | $1,001 - $2,500 | Dividend | $250,001 - $500,000 | Cash/Market |
| 53. | **V, VISA INC.** | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| 54. | **XOM, EXXON MOBIL CORP** | $1,000 or less | 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



Produced by Administrative Office of the United States Courts