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
O'Toole, George A.	U.S. District Court, District of Massachusetts	06/16/2025
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
U.S. District Judge (Senior)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
John Joseph Moakley United States Courthouse 1 Courthouse Way Boston, MA 02210		

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.	2024	Contract employee, Massachusetts Department of Public Health
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.	James Wilson Institute	Nov. 1-2, 2024	Washington, DC	Colloquium	Transportation, food, lodging
2.					
3.					
4.					
5.					

V. GIFTS. *(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure		B. Income during reporting period		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)	
1.	Individual Assets (H)									
2.	Bank of America (cash)	A	Interest	J	T					
3.	Manulife Financial (whole life)	A	Interest	K	T					
4.	Virtus Investment Partners Inc (VRTS) (was Merger Fund)	A	Dividend	J	T					
5.	Account #1 (H)									
6.	Morgan Stanley Bank (cash)	A	Interest	J	T					
7.	Abbott Laboratories (ABT)	A	Dividend	J	T					
8.	Accenture Plc Ireland Cl A (ACN)	A	Dividend	J	T	Buy (add'l)	08/16/24	J		
9.	Adobe Inc (ADBE)		None	J	T	Sold (part)	02/21/24	J	B	
10.						Buy (add'l)	07/05/24	J		
11.	Air Prod & Chem Inc (APD)	A	Dividend			Buy (add'l)	01/18/24	J		
12.						Sold	08/16/24	J	A	
13.	Airbnb Inc Cl A (ABNB)		None	J	T					
14.	Alphabet Inc. Cl A (GOOGL)		None	J	T					
15.	Alphabet Inc. Cl C (GOOG)		None	J	T	Sold (part)	09/04/24	J	B	
16.	Altria Group (MO)	A	Dividend			Sold	08/16/24	J	A	
17.	Amazon Com Inc (AMZN)		None	J	T	Sold (part)	04/09/24	J	A	

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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
18.					Sold (part)	11/15/24	J	A	
19.					Sold (part)	11/18/24	J	A	
20. Apple Inc (APPL)	A	Dividend	J	T	Buy (add'l)	07/08/24	J		
21. Autodesk Inc (ADSK)		None			Sold	06/07/24	J	A	
22. Berkshire Hathaway CL-B NEW (BRK'B)		None			Sold	08/16/24	J	C	
23. Blackrock Inc (BLK)	A	Dividend	J	T	Sold (part)	08/16/24	J	B	
24. Broadcom Inc (AVGO)	A	Dividend	J	T	Buy	08/21/24	J		
25. Charles Schwab New (SCHW)	A	Dividend			Sold	08/16/24	J	A	
26. CDW Corporation (CDW)	A	Dividend			Buy	08/16/24	J		
27.					Sold	11/07/24	J		
28. Chevron Corp (CVX)	A	Dividend	J	T					
29. CME Group inc (CME)	A	Dividend	J	T	Buy	08/16/24	J		
30. Cincinnati Financial Ohio (CINF)	A	Dividend			Sold	08/16/24	J	B	
31. Cisco Sys Inc (CSCO)	A	Dividend			Sold	08/16/24	J	B	
32. Comcast Corp (NEW) Class A (CMCSA)	A	Dividend			Sold	08/16/24	J		
33. Constellation Energy Corp (CEG)	A	Dividend	J	T	Buy	08/16/24	J		
34. Corebridge Finl Inc (CRBG)	A	Dividend	J	T	Buy	11/07/24	J		

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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
35. Costar Group Inc (CSGP) (X)		None	J	T					
36. Costco Wholesale Corp New (COST)	A	Dividend	J	T	Buy	08/16/24	J		
37. CRH PLC (CRH)	A	Dividend	J	T	Buy	08/16/24	J		
38. Crown Castle Inc (CCI)	A	Dividend			Sold	08/16/24	J	A	
39. Diageo Plc Spon Adr New (DEO)	A	Dividend			Sold	08/16/24	J	A	
40. Dominion Energy Inc (D)	A	Dividend			Sold	08/16/24	J		
41. Eli Lilly & Co (LLY)	A	Dividend	J	T	Buy	08/16/24	J		
42. Extra Space Storage Inc (EXR)	A	Dividend	J	T	Buy	08/16/24	J		
43. Fastenal Co (FAST)	A	Dividend			Sold	08/16/24	J	B	
44. Fidelity Natl Information SE (FIS)	A	Dividend			Sold	08/16/24	J		
45. Ferguson Enterprises Inc (FERG)	A	Dividend	J	T	Buy	08/16/24	J		
46. Gartner Inc (IT)		None	J	T	Sold (part)	11/26/24	J	A	
47. Johnson & Johnson (JNJ)	A	Dividend	J	T	Sold (part)	08/16/24	J	A	
48. JPMorgan Chase & Co (JPM)	A	Dividend	J	T	Buy	08/16/24	J		
49. Lam Research Corporation (LRCX)	A	Dividend	J	T	Buy	08/16/24	J		
50. Linde Plc (LIN)	A	Dividend	J	T	Buy	08/16/24	J		
51. Lowes Companies Inc (LOW)	A	Dividend	J	T	Sold (part)	08/16/24	J	A	

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

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)	
52.	Marsh & Mclennan Cos Inc (MMC)	A	Dividend	J	T	Buy	08/16/24	J		
53.	Mastercard Inc Cl A (MA)	A	Dividend	J	T					
54.	Mckesson Corp (MCK)	A	Dividend	J	T	Buy	08/16/24	J		
55.	Merck & Co Inc New Com (MRK)	A	Dividend			Sold	08/16/24	J	B	
56.	Medtronic Plc Shs (MDT)	A	Dividend	J	T	Buy	08/16/24	J		
57.	Microsoft Corp (MFST)	A	Dividend	J	T	Buy (add'l)	08/16/24	J		
58.						Sold (part)	09/04/24	J		
59.	Mondelez Intl Inc Com (MDLZ)	A	Dividend	J	T	Buy	08/16/24	J		
60.	Morgan Stanley (MS)	A	Dividend	J	T	Buy	08/16/24	J		
61.	MSCI Inc Com (MSCI)	A	Dividend	J	T	Buy	05/20/24	J		
62.	Nestle Spon Adr Rep Reg Shr (NSRGY)	A	Dividend			Sold	08/16/24	J	A	
63.	Netflix (NFLX)		None	J	T	Sold (part)	05/15/24	J	A	
64.	Nextera Energy Inc (NEE)	A	Dividend	J	T	Buy	08/16/24	J		
65.	Nike Inc B (NKE)	A	Dividend			Sold	07/08/24	J	A	
66.	Nintendo Co Ltd Adr New (NTDOY)	A	Dividend			Buy (add'l)	05/22/24	J		
67.						Sold	08/16/24	J		
68.	Norfolk Southern Corp (NSC)	A	Dividend			Sold	08/16/24	J	B	

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

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

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

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)	
69. Northrop Grumann CP (NOC)	A	Dividend			Sold	08/16/24	J	A	
70. Novo Norodisk A/S Adr (NVO)	A	Dividend	J	T					
71. NXP Semiconductors NV (NXPI)	A	Dividend			Buy	08/16/24	J		
72.					Sold (part)	08/21/24	J		
73.					Sold	09/11/24	J		
74. Oracle Corp (ORCL)	A	Dividend	J	T	Buy	08/16/24	J		
75.					Buy (add'l)	09/04/24	J		
76. Parker Hannifin Corp (PH)	A	Dividend	J	T	Buy	08/16/24	J		
77. Paycom Software Inc (PAYC) (X)	A	Dividend	J	T					
78. Pepsico Inc NC (PEP)	A	Dividend	J	T	Buy	08/16/24	J		
79. Paychex Inc (PAYX)	A	Dividend			Sold	08/16/24	J	B	
80. Paypal Hldgs Inc Com (PPLY)		None			Sold	03/04/24	J		
81. Phillip Morris Intl Inc (PM)	A	Dividend	J	T	Sold (part)	08/16/24	J	A	
82. Realty Income Corp (O)	A	Dividend	J	T	Buy	08/16/24	J		
83. Progressive Corp Ohio (PGR)	A	Dividend			Sold	08/16/24	J	C	
84. Salesforce Inc (CRM)	A	Dividend			Sold	07/05/24	J		
85. Servicenow Inc (NOW)		None	J	T	Sold (part)	03/01/24	J	B	

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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
86.					Sold (part)	11/18/24	J	A	
87. Shopify Inc (SHOP) (X)		None	J	T					
88. Starbucks Corp Washington (SBUX)	A	Dividend			Sold	08/16/24	J	A	
89. TE Connectivity Ltd (TEL)	A	Dividend			Buy	06/25/24	J		
90.					Sold	08/16/24	J		
91. Texas Instruments (TXN)	A	Dividend			Sold	08/16/24	J	C	
92. T-Mobile US Inc Com (TMUS)	A	Dividend	J	T	Buy	08/16/24	J		
93. Thermo Fisher Scientific (TMO)	A	Dividend	J	T					
94. TJX Cos Inc New (TJX)	A	Dividend	J	T	Buy	08/16/24	J		
95. Trane Technologies Plc (TT)	A	Dividend	J	T	Buy	08/16/24	J		
96. United Parcel Ser Inc CL-B (UNH)	A	Dividend			Sold	08/16/24	J	A	
97. Union Pacific Corp (UNP)	A	Dividend	J	T	Buy	08/16/24	J		
98. UnitedHealth Gp Inc (UNH)	A	Dividend	J	T	Buy (add'l)	08/16/24	J		
99. Verizon Communications (VZ)	A	Dividend			Sold	06/25/24	J		
100. Visa Inc Cl A (V)	A	Dividend	J	T	Buy (add'l)	08/16/24	J		
101. WEC Energy Group Inc Com (WEC)	A	Dividend	J	T	Buy	08/16/24	J		
102. Workday Inc Cl A (WDAY)		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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
103. Zoetis Inc Class-A (ZTS)	A	Dividend	J	T					
104. Invesco Bul Shrs 2023 CB ETF (BSCX)	A	Dividend	K	T	Buy	08/16/24	K		
105. Invesco Bulletshares 2024 Co (BSCO)	A	Dividend			Buy	08/16/24	J		
106.					Sold	11/01/24	J		
107. Invesco Bulletshares 2025 Co (BSCP)	A	Dividend	K	T	Buy	08/16/24	J		
108. Invesco Bulletshares 2026 Co (BSCQ)	A	Dividend	K	T	Buy	08/16/24	J		
109. Invesco Bulletshares 2027 Co (BSCR)	A	Dividend	K	T	Buy	08/16/24	J		
110. Invesco Bulletshares 2028 (BSCS)	A	Dividend	K	T	Buy	08/16/24	J		
111. Invesco Bulletshares 2029 Co (BSCT)	A	Dividend	J	T	Buy	08/16/24	K		
112. Invesco Bulletshares 2030 CB (BSCU)	A	Dividend	K	T	Buy	08/16/24	K		
113. Invesco Bulletshares 2031 CR (BSCV)	A	Dividend	K	T	Buy	08/16/24	K		
114. Invesco Bultsr 2034 C B ETF (BSCY)	A	Dividend	K	T	Buy	11/01/24	K		
115. Invsc Bulletshares 2032 Corp (BSCW)	A	Dividend	K	T	Buy	08/16/24	K		
116. Vanguard Utilities ETF (VPU)	A	Dividend	K	T	Buy (add'l)	02/22/24	J		
117. Blackrock Low Dur Bd Inv Inst (BFMSX)	B	Dividend			Buy (add'l)	04/10/24	J		
118.					Sold	08/16/24	L		
119. Calamos Market Neutral Inc L (CMNIX)	B	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
120. Harding Loevner Intl Eqty Inst (HLMIX)	C	Dividend	L	T					
121. JPMorgan Hedged Equity 2 (JHQDX)	A	Dividend	K	T					
122. TCW MetWest Tot Ret Bd L (MWTIX)	C	Dividend	K	T	Buy (add'l)	02/22/24	J		
123.					Buy (add'l)	04/10/24	J		
124.					Sold (part)	08/16/24	K		
125. Neuberger Berman Lg Sh Inst (NLSIX)	A	Dividend	K	T					
126. Principal Real Est Sec Inst (PIREX)	A	Dividend	J	T					
127. Account #2 (H)									
128. American Funds Cap World Gr & Inc F2 (WGIFX)	A	Dividend	J	T	Sold (part)	01/16/24	J	A	
129. Blackrock Low Dur Bd Inv Inst (BFMSX)	A	Dividend	J	T	Sold (part)	01/16/24	J		
130. Calamos Market Neutral Inc L (CMNIX)	A	Dividend	J	T	Sold (part)	01/16/24	J	A	
131. TCW MetWest Tot Ret Bd L (MWTIX)	A	Dividend	K	T	Sold (part)	01/16/24	J		
132. Neuberger Berman Lg Sh Inst (NLSIX) (Y)									
133. Nuveen Dividend Growth I (NSBRX)	A	Dividend	J	T	Sold (part)	01/16/24	J	B	
134. PGIM Short-Term Corp Bond Z (PIFZX)	A	Dividend	J	T	Sold (part)	01/16/24	J		
135. Principal Real Est Sec Inst (PIREX)	A	Dividend	J	T					
136. Account #3 (H)									

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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
137. Morgan Stanley Bank (cash)	A	Dividend	J	T					
138. Abbott Laboratories (ABT)	A	Dividend	J	T	Sold (part)	08/26/24	J	B	
139. Abbvie Inc Com (ABBV)	A	Dividend	J	T					
140. Accenture Plc Ireland Cl A (ACN)	A	Dividend	J	T	Sold (part)	08/26/24	J	D	
141. Adobe Inc (ADBE)		None			Sold (part)	02/21/24	J	B	
142.					Buy (add'l)	07/05/24	J		
143.					Sold	08/26/24	J	C	
144. Airbnb Inc Cl A (ABNB)		None			Sold	08/26/24	J		
145. Align Technology (ALGN)		None			Sold	06/04/24	J	A	
146. Advanced Micro Devices (AMD)		None	J	T	Buy	08/26/24	J		
147. Alphabet Inc Cl A (GOOGL)		None	J	T	Buy (add'l)	08/26/24	J		
148. Alphabet Inc CL C (GOOG)		None			Sold	08/26/24	J	D	
149. Amazon Com Inc (AMZN)		None	J	T	Sold (part)	04/09/24	J	A	
150.					Sold (part)	07/08/24	J	A	
151.					Sold (part)	08/26/24	K	D	
152. Amer Intl Gp Inc New (AIG)	A	Dividend	J	T	Buy	08/26/24	J		
153. American Elec Pwr Co Inc (AEP)	A	Dividend	J	T	Buy	08/26/24	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

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

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

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
154. American Express Co (AXP)	A	Dividend	J	T	Sold (part)	08/26/24	J	B	
155. American Tower Corp (AMT)	A	Dividend			Sold	08/26/24	J	A	
156. Amphenol Corp New Cl A (APH)	A	Dividend			Buy	08/06/24	J		
157.					Sold	08/26/24	J	A	
158. American Water Works Co (AWK) (Y)					Buy	08/26/24	J		
159. Ameriprise Fincl Inc (AMP)	A	Dividend	J	T	Buy	08/26/24	J		
160. Amgen Inc (AMGN)	A	Dividend	J	T	Buy	08/26/24	J		
161. Apollo Global Mgmt Inc Cl A (APO)	A	Dividend	J	T	Buy	08/26/24	J		
162. Apple Inc (APPL)	A	Dividend	J	T	Buy (add'l)	07/08/24	J		
163.					Sold (part)	08/26/24	K	D	
164. Applied Materials Inc (AMAT)	A	Dividend	J	T	Buy	08/26/24	J		
165. Applovin Corp (APP) (X)	A	Dividend			Sold	12/10/24	J	B	
166. Astrazeneca Plc Adr (AZN)	A	Dividend	J	T	Buy	08/26/24	J		
167. Autodesk Inc (ADSK)		None			Sold	06/07/24	J	B	
168. Ball Corp (BALL)	A	Dividend	J	T	Buy	08/26/24	J		
169. Bank of America Corp (BAC)	A	Dividend	J	T	Buy	08/26/24	J		
170. Broadcom Inc (AVGO)	A	Dividend			Sold (part)	03/07/24	J	A	

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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
171.					Sold (part)	06/24/24	J	B	
172.					Sold	08/26/24	J	D	
173. Berkley W R Corp (WRB)	A	Dividend	J	T	Buy	08/26/24	J		
174. BJs Whsl Club Hldgs Inc (BJ)		None	J	T	Buy	08/26/24	J		
175. Blackrock Inc (BLK) (X)	A	Dividend	J	T					
176. Boston Scientific Corp (BSX)	A	Dividend	J	T	Buy	08/26/24	J		
177. Caci International Inc Cl A (CACI)	A	Dividend	J	T	Buy	08/26/24	J		
178. Cadence Design System (CDNS)	A	Dividend	J	T	Buy	08/26/24	J		
179. Capital One Financial Corp (COF)	A	Dividend	J	T	Buy	08/26/24	J		
180. Caterpillar Inc (CAT)	A	Dividend	J	T	Buy	08/26/24	J		
181. Celanese Corp Series A Com Stk (CE) (Y)					Buy	08/26/24	J		
182. Charles Schwab New (SCHW)	A	Dividend	J	T	Sold (part)	08/26/24	J	A	
183. Charter Communications Inc (CHTR)		None	J	T	Buy	08/26/24	J		
184. Chevron Corp (CVX)	A	Dividend	J	T	Sold (part)	08/26/24	J	A	
185. Cintas Corp (CTAS)	A	Dividend	J	T	Buy	08/26/24	J		
186. Citigroup Inc New (C)	A	Dividend	J	T	Buy	08/26/24	J		
187. Coca Cola (KO)	A	Dividend	J	T	Buy	08/26/24	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		

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)	
188. Comcast Corp (NEW) Class A (CMCSA)	A	Dividend			Sold	08/26/24	J	B	
189. Conocophillips (COP)	A	Dividend	J	T	Buy	08/26/24	J		
190. Corteva Inc (CTVA)	A	Dividend	J	T	Buy	08/26/24	J		
191. Eaton Corp Plc Shs (ETN)	A	Dividend			Sold (part)	02/08/24	J	A	
192.					Sold	08/26/24	J	B	
193. Elevance Health Inc (ELV)	A	Dividend			Sold	08/26/24	J	C	
194. Eastman Chemical Company (EMN)	A	Dividend	J	T	Buy	08/26/24	J		
195. Eli Lilly & Co (LLY)	A	Dividend	J	T					
196. Emcor Group Inc (EME)	A	Dividend	J	T	Buy	08/26/24	J		
197. Emerson Electric (EMR) (X)	A	Dividend	J	T					
198. Exxon Mobil Corp (XOM)	A	Dividend	J	T	Buy (add'l)	08/26/24	J		
199. FedEx Corp (FDX)	A	Dividend	J	T	Buy	08/26/24	J		
200. Fidelity Natl Information SE (FIS)	A	Dividend			Sold	01/23/24	J		
201. Fiserv Inc (FI)	A	Dividend	J	T	Buy	08/26/24	J		
202. Freeport-McMoran Cl-B (FCX)	A	Dividend	J	T	Buy	08/26/24	J		
203. Gaming & Leisure PPTYS Inc Com (GLPI)	A	Dividend	J	T	Buy	08/26/24	J		
204. Gartner Inc (IT)		None			Sold	08/26/24	J	C	

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
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
205. General Mtrs Co (GM)	A	Dividend	J	T	Buy	08/26/24	J		
206. Genl Dynamics Corp (GD) (Y)					Buy	08/26/24	J		
207. Goldman Sachs GRP Inc (GS)	A	Dividend	J	T	Buy	08/26/24	J		
208. Hartford Fin Sers Grp Inc (HIG)	A	Dividend	J	T	Buy	08/26/24	J		
209. Hershey Company (HSY)	A	Dividend	J	T	Buy	08/26/24	J		
210. Hilton Worldwide Hldgs Inc (HLT)	A	Dividend	J	T	Buy	08/26/24	J		
211. Home Depot Inc (HD)	A	Dividend	J	T	Buy	08/26/24	J		
212. Honeywell Intl Inc (HON)	A	Dividend			Sold (part)	08/26/24	J	B	
213.					Sold	10/29/24	J	A	
214. Ingersoll Rand Inc (IR)	A	Dividend	J	T	Buy	08/26/24	J		
215. Intuit Inc (INTU)	A	Dividend	J	T	Buy	08/26/24	J		
216. Itron Inc (ITRI)	A	Dividend	J	T	Buy	08/26/24	J		
217. Johnson & Johnson (JNJ)	A	Dividend	J	T	Buy	08/26/24	J		
218. Johnson Ctls Intl Plc (JCI)	A	Dividend	J	T	Buy	08/26/24	J		
219. JPMorgan Chase & Co (JPM)	A	Dividend	J	T	Sold (part)	08/26/24	J	C	
220. Linde Plc (LIN)	A	Dividend			Sold	08/26/24	J	D	
221. Lowes Companies Inc (LOW)	A	Dividend			Sold	08/26/24	J	C	

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
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
222. Manhattan Assoc Inc (MANH)	A	Dividend	J	T	Buy	08/26/24	J		
223. Marathon Oil Co (MRO)	A	Dividend			Buy	08/26/24	J		
224.					Sold	11/07/24	J		
225. Marriott Intl Inc New Cl A (MAR)	A	Dividend	J	T	Buy	08/26/24	J		
226. Marsh & Mclennan Cos Inc (MMC)	A	Dividend	J	T	Sold (part)	08/26/24	J	B	
227. Marvell Technology Inc (MRVL) (X)	A	Dividend	J	T					
228. Mastercard Inc Cl A (MA)	A	Dividend			Sold	08/26/24	J	D	
229. McDonalds Corp (MCD)	A	Dividend	J	T	Sold (part)	08/26/24	J	A	
230. Mckesson Corp (MCK)	A	Dividend	J	T	Buy	08/26/24	J		
231. Merck & Co Inc New Com (MRK) (Y)					Buy	08/26/24	J		
232. Meta Platforms Inc Cl A (META)	A	Dividend	J	T	Buy	08/26/24	J		
233. MetLife Incorporated (MET)	A	Dividend	J	T	Buy	08/26/24	J		
234. Microsoft Corp (MFST)	A	Dividend	J	T	Buy (add'l)	01/23/24	J		
235.					Sold (part)	08/26/24	K	D	
236. Molina Healthcare Inc (MOH) (Y)					Buy	08/26/24	J		
237. Mondelez Intl Inc Com (MDLZ)	A	Dividend			Sold	08/26/24	J	B	
238. Motorola Solutions Inc (MSI)	A	Dividend			Sold (part)	08/06/24	J	C	

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
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
239.					Sold	08/26/24	J	C	
240. MSCI Inc Com (MSCI)	A	Dividend			Buy	05/21/24	J		
241.					Buy (add'l)	08/21/24	J		
242.					Buy (add'l)	08/22/24	J		
243.					Sold	08/26/24	J	A	
244. Moodys Corp (MCO)	A	Dividend	J	T	Buy	08/26/24	J		
245. Netflix (NFLX)		None	J	T	Sold (part)	05/15/24	J	B	
246.					Sold (part)	08/26/24	J	C	
247. Nextera Energy Inc (NEE)	A	Dividend	J	T	Sold (part)	08/26/24	J	A	
248. Nike Inc B (NKE)	A	Dividend			Buy (add'l)	02/21/24	J		
249.					Sold	07/08/24	J	A	
250. Northrop Grumman CP (NOC)	A	Dividend	J	T	Buy (add'l)	08/26/24	J		
251. NRG Energy Inc (NRG)	A	Dividend	J	T	Buy	08/26/24	J		
252. NVIDIA Corporation (NVDA)	A	Dividend	J	T	Buy	08/26/24	J		
253. NXP Semiconductors NV (NXPI)	A	Dividend	J	T	Buy	08/26/24	J		
254. Novo Nordisk A/S Adr (NVO)	A	Dividend			Sold	08/26/24	J	B	
255. Oracle Corp (ORCL)	A	Dividend	J	T	Buy	08/26/24	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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
256. Packaging Corp Amer (PKG)	A	Dividend			Sold	08/26/24	J	C	
257. Palo Alto Networks Inc (PANW)		None	J	T	Buy	08/26/24	J		
258. Paypal Hldgs Inc Com (PPLY)		None			Sold (part)	03/01/24	J		
259.					Sold	03/04/24	J		
260. Paycom Software Inc (PAYC)	A	Dividend			Buy	04/10/24	J		
261.					Sold	08/26/24	J		
262. Pepsi Co Inc NC (PEP)	A	Dividend	J	T	Sold (part)	08/26/24	J	A	
263. Phillip Morris Intl Inc (PM)	A	Dividend	J	T					
264. PNC Finl Svcs Gp (PNC)	A	Dividend	J	T	Buy	08/26/24	J		
265. PPL Corporation (PPL)	A	Dividend	J	T	Buy	08/26/24	J		
266. Procter & Gamble (PG)	A	Dividend	J	T	Buy	08/26/24	J		
267. Prologis Inc Com (PLD)	A	Dividend			Sold	08/26/24	J		
268. Pulte Group Inc (PHM)	A	Dividend	J	T	Buy	08/26/24	J		
269. Pure Storage Inc Class A (PSTG)	A	Dividend	J	T	Buy	08/26/24	J		
270. Qualcomm Inc (QCOM)	A	Dividend	J	T	Buy	08/26/24	J		
271. Regeneron Pharmaceuticals Inc (REGN)	A	Dividend	J	T	Buy	08/26/24	J		
272. Republic Services Inc (RSG)	A	Dividend	J	T	Buy	08/26/24	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

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. Royal Caribbean Group Com (RCL)	A	Dividend	J	T	Buy	08/26/24	J		
274. RTX Corporation (RTX) (X)	A	Dividend	J	T					
275. S&P Global Inc Com (SPGI)	A	Dividend			Sold	08/26/24	J	A	
276. Salesforce Inc (CRM)	A	Dividend			Sold (part)	07/05/24	J	B	
277.					Sold (part)	08/16/24	J	A	
278.					Sold	08/19/24	J	A	
279. Sanofi Adr (SNY)	A	Dividend	J	T	Buy	08/26/24	J		
280. Servicenow Inc (NOW)		None			Sold (part)	03/01/24	J	B	
281.					Sold	08/26/24	J	D	
282. Shopify Inc (SHOP)	A	Dividend			Buy	06/07/24	J		
283.					Buy (add'l)	06/10/24	J		
284.					Buy (add'l)	08/19/24	J		
285.					Sold	08/26/24	J	A	
286. Southern Co (SO)	A	Dividend	J	T	Buy	08/26/24	J		
287. Southwest Airlines (LUV)	A	Dividend	J	T	Buy	08/26/24	J		
288. Spotify Technology Sa (SPOT)	A	Dividend	J	T	Buy	08/26/24	J		
289. Starbucks Corp Washington (SBUX)	A	Dividend			Buy	02/08/24	J		

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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
290.					Sold	08/26/24	J		
291. Stryker Corp (SYK)	A	Dividend	J	T	Buy	08/26/24	J		
292. Synopsys Inc (SNPS)	A	Dividend	J	T	Buy	08/26/24	J		
293. T-Mobile US Inc Com (TMUS)	A	Dividend	J	T	Buy	08/26/24	J		
294. Taiwan Smcndctr (TSM)	A	Dividend			Buy	03/08/24	J		
295.					Buy (add'l)	04/25/24	J		
296.					Sold	08/26/24	J	A	
297. Tesla Inc (TSLA)	A	Dividend	J	T	Buy	08/26/24	J		
298. Tetra Tech Inc (TTEK)	A	Dividend	J	T	Buy	08/26/24	J		
299. Texas Instruments (TXN)	A	Dividend	J	T	Sold (part)	03/07/24	J	A	
300.					Sold (part)	04/25/24	J	A	
301. Thermo Fisher Scientific (TMO)	A	Dividend	J	T	Buy (add'l)	03/04/24	J		
302. TJX Cos Inc New (TJX)	A	Dividend	J	T	Sold (part)	08/26/24	J	B	
303. Trane Technologies Plc (TT)	A	Dividend			Sold (part)	02/08/24	J	A	
304.					Sold	08/26/24	J	C	
305. Truist Finl Corp (TFC)	A	Dividend	J	T	Buy	08/26/24	J		
306. Union Pacific Corp (UNP)	A	Dividend			Sold	08/26/24	J	B	

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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
307. United Rentals Inc (URI)	A	Dividend	J	T	Buy	08/26/24	J		
308. UnitedHealth Gp Inc (UNH)	A	Dividend	J	T	Sold (part)	08/26/24	J	B	
309. Valero Energy Cp Dela New (VLO)	A	Dividend	J	T	Buy	08/26/24	J		
310. Vertex Pharmaceuticals (VRTX)	A	Dividend	J	T	Buy	08/26/24	J		
311. Visa Inc Cl A (V)	A	Dividend			Buy (add'l)	03/01/24	J		
312.					Sold	08/26/24	J	D	
313. Vertiv Holdings Llc Cl A (VRT)	A	Dividend	J	T	Buy	08/26/24	J		
314. Walmart Inc (WMT)	A	Dividend	J	T	Buy (add'l)	08/26/24	J		
315. Wec Energy Group Inc Com (WEC)	A	Dividend			Sold	08/26/24	J	B	
316. Workday Inc Cl A (WDAY)		None			Buy (add'l)	07/08/24	J		
317.					Sold	08/26/24	J		
318. Zoetis Inc Class-A (ZTS)	A	Dividend			Buy (add'l)	03/04/24	J		
319.					Sold	08/26/24	J	B	
320. Inevsco Bul Shrs 2033 CB ETF (BSCX)	A	Dividend	J	T	Sold (part)	08/26/24	K	B	
321. Invesco Bulletshares 2024 Co (BSCO)	A	Dividend			Sold (part)	08/26/24	K	A	
322.					Sold	11/01/24	J	A	
323. Invesco Bulletshares 2025 Co (BSCP)	A	Dividend	J	T	Sold (part)	08/26/24	K	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; 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
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
324. Invesco Bulletshares 2026 Co (BSCQ)	A	Dividend	J	T	Sold (part)	08/26/24	K	A	
325. Invesco Bulletshares 2027 Co (BSCR)	A	Dividend	J	T	Sold (part)	08/26/24	K	A	
326. Invesco Bulletshares 2028 (BSCS)	A	Dividend	J	T	Sold (part)	08/26/24	K	A	
327. Invesco Bulletshares 2029 Co (BSCT)	A	Dividend	J	T	Sold (part)	08/26/24	K	A	
328. Invesco Bulletshares 2030 CB (BSCU)	A	Dividend	J	T	Sold (part)	08/26/24	K	B	
329. Invesco Bulletshares 2031 CB (BSCV)	A	Dividend	J	T	Sold (part)	08/26/24	K	B	
330. Invesco Bultsr 2034 C B ETF (BSCY)	A	Dividend	J	T	Buy	11/01/24	J		
331. Invesco Bulletshares 2032 Corp (BSCW)	A	Dividend	J	T	Sold (part)	08/26/24	K	B	
332. Calamos Market Neutral Inc L (CMNIX)	C	Dividend			Sold	08/26/24	L	D	
333. Cohen & Steers Real Est Secs I (CDIX)	A	Dividend			Buy (add'l)	03/01/24	J		
334.					Sold	08/26/24	J	C	
335. Harding Loevner Intl Eqty Inst (HLMIX)	C	Dividend			Buy (add'l)	03/01/24	J		
336.					Sold	08/26/24	M	E	
337. JPMorgan Hedged Equity 2 (JHQDX)	A	Dividend			Sold	08/26/24	K	B	
338. Neuberger Berman Lg Sh Inst (NLSIX)	A	Dividend			Sold	08/26/24	K	B	
339. Principal Midcap Intl (PCBIX)	B	Dividend			Sold	08/26/24	L	E	
340. Account #4 (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
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
341. Morgan Stanley Bank (cash) (Y)									
342. Account #5 (H)									
343. Abbott Laboratories (ABT)	A	Dividend	J	T					
344. Accenture Plc Ireland Cl A (ACN)	A	Dividend	J	T					
345. Adobe Inc (ADBE)		None	J	T	Sold (part)	02/21/24	J	B	
346. Air Prod & Chem Inc (APD)	A	Dividend	J	T	Sold	03/14/24	J		
347.					Buy	04/15/24	J		
348. Airbnb Inc Cl A (ABNB)		None	J	T					
349. Alphabet Inc Cl A (GOOGL) (Y)									
350. Alphabet Inc CL C (GOOG)		None	J	T					
351. Altria Group (MO)	A	Dividend	J	T					
352. Amazon Com Inc (AMZN)		None	J	T	Sold (part)	04/09/24	J	A	
353. Apple Inc (APPL)	A	Dividend	J	T	Buy (add'l)	07/08/24	J		
354. Autodesk Inc (ADSK)		None			Sold	06/07/24	J	B	
355. Berkshire Hathaway CL-B NEW (BRK'B)		None	J	T					
356. Blackrock Inc (BLK)	A	Dividend	J	T					
357. Charles Schwab New (SCHW)	A	Dividend	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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
358. Chevron Corp (CVX)	A	Dividend	J	T					
359. Cincinnati Financial Ohio (CINF)	A	Dividend	J	T					
360. Cisco Sys Inc (CSCO)	A	Dividend	J	T					
361. Comcast Corp (NEW) Class A (CMCSA)	A	Dividend	J	T					
362. Crown Castle Inc (CCI)	A	Dividend	J	T					
363. Diageo Plc Spon Adr New (DEO)	A	Dividend	J	T					
364. Dominion Energy Inc (D)	A	Dividend	J	T	Buy	01/11/24	J		
365. Eli Lilly & Co (LLY) (X)	A	Dividend	J	T					
366. Fastenal Co (FAST)	A	Dividend	J	T					
367. Fidelity Natl Information Se (FIS)	A	Dividend	J	T	Buy	01/11/24	J		
368. Gartner Inc (IT) (Y)									
369. Johnson & Johnson (JNJ)	A	Dividend	J	T					
370. Lowes Companies Inc (LOW)	A	Dividend	J	T					
371. Mastercard Inc Cl A (MA)	A	Dividend	J	T					
372. Merck & Co Inc New Com (MRK)	A	Dividend	J	T					
373. Microsoft Corp (MFST)	A	Dividend	J	T					
374. MSCI Inc Com (MSCI)	A	Dividend	J	T	Buy	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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
375. Nestle Spon Adr Rep Reg Shr (NSRGY)	A	Dividend	J	T					
376. Netflix (NFLX)		None	J	T	Sold (part)	05/15/24	J	A	
377. Nike Inc B (NKE) (Y)									
378. Nintendo Co Ltd Adr New (NTDOY)	A	Dividend	J	T					
379. Norfolk Southern Corp (NSC)	A	Dividend	J	T					
380. Northrop Grumann CP (NOC)	A	Dividend	J	T					
381. Novo Nordisk A/S Adr (NOVO) (Y)									
382. Oracle Corp (ORCL)	A	Dividend	J	T	Buy	09/04/24	J		
383. Paychex Inc (PAYX)	A	Dividend	J	T					
384. PayPal Hldgs Inc Com (PYPL)	A	Dividend			Buy	01/11/24	J		
385.					Sold	03/04/24	J		
386. Philip Morris Intl Inc (PM)	A	Dividend	J	T					
387. Progressive Corp Ohio (PGR)	A	Dividend	J	T					
388. Salesforce Inc (CRM)		None			Sold	07/05/24	J	A	
389. Servicenow Inc (NOW)		None	J	T	Sold (part)	03/01/24	J	A	
390. Shopify Inc (SHOP) (X)		None	J	T					
391. Starbucks Corp Washington (SBUX)	A	Dividend	J	T	Sold	06/18/24	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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
392.					Buy	07/22/24	J		
393. TE Connectivity PLC (TEL) (X)		None	J	T					
394. Texas Instruments (TXN)	A	Dividend	J	T					
395. Thermo Fisher Scientific (TMO)	A	Dividend	J	T	Buy	01/11/24	J		
396. United Parcel Ser Inc CL-B (UPS)	A	Dividend	J	T					
397. UnitedHealth Gp Inc (UNH)	A	Dividend	J	T					
398. Verizon Communications (VZ)	A	Dividend			Sold	06/25/24	J	A	
399. Visa Inc Cl A (V)	A	Dividend	J	T					
400. Workday Inc Cl A (WDAY)		None	J	T					
401. Zoetis Inc Class-A (ZTS)	A	Dividend	J	T					
402. Invesco Bulletshares 2024 MU (BSMO)	A	Dividend			Sold (part)	07/09/24	J	A	
403.					Sold	11/01/24	J	A	
404. Invesco Bltshrs 2031 Muni (BSMV)	A	Dividend	J	T	Buy	11/01/24	J		
405. Invesco Bulletshares 2025 MU (BSMP)	A	Dividend	J	T	Sold (part)	07/09/24	J	A	
406. Invesco Bulletshares 2026 MU (BSMQ)	A	Dividend	J	T	Sold (part)	07/09/24	J	A	
407. Invesco Bulletshares 2027 MU (BSMR)	A	Dividend	J	T	Sold (part)	07/09/24	J	A	
408. Invesco Bulletshares 2028 MU (BSMS)	A	Dividend	J	T	Sold (part)	07/09/24	J	A	

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

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
409. Invesco Bulletshares 2029 MU (BSMT)	A	Dividend	J	T	Sold (part)	07/09/24	J	A	
410. Invesco Bulletshares 2030 (BSMU)	A	Dividend	J	T	Sold (part)	07/09/24	J	A	
411. iShares Core S&P 500 ETF (IVV)		None			Sold	01/11/24	J	A	
412.					Buy	03/14/24	J		
413.					Sold	04/15/24	J		
414.					Buy	06/18/24	J		
415.					Sold	07/19/24	J	A	
416. iShares Russell 1000 Grw ETF (IWF)		None			Sold	01/11/24	J	A	
417. Harding Loevner Intl Eqty Inst (HLMIX)	B	Dividend	K	T					
418. Account #6 (H)									
419. CVS Health Corp Com (CVS)	A	Dividend	J	T	Sold (part)	01/04/24	J	D	
420. Exxon Mobil Corp (XOM)	A	Dividend	J	T	Sold (part)	01/04/24	J	D	
421. Johnson & Johnson (JNJ)	A	Dividend	J	T	Sold (part)	01/04/24	J	D	
422. Procter & Gamble (PG)	A	Dividend	J	T	Sold (part)	01/04/24	J	D	
423. Stericycle Inc (SRCL)		None			Sold	01/04/24	J	B	
424. Account #7 (H)									
425. Morgan Stanley (cash)	A	Interest	K	T	Open	09/27/24	O		

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
O'Toole, George A.	06/16/2025

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
426. Prudential Fixed Annuity w/ Daily Adv Inc: Fixed Rate Strategy - 7 Yr		None	O	T	Buy	09/28/24	O		

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
O'Toole, George A.	06/16/2025

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

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value.

Part VII, line 11: This transaction was previously reported as "Buy" on 1/8/2024 and is amended herein.

Part VII, line 41 and 266: These transactions were previously reported as "Buy (add'l)" and are amended herein.

Part VII, line 84, 267, 278, and 388: These transactions were previously reported as "Sold (part)" and are amended herein.

Part VII, line 148: This transaction was previously reported as "Sold (part);" the transaction type and description are amended herein.

Part VII, Lines 158, 181, 206, 231, and 236: Following reportable purchases, these assets became unreportable without corresponding reportable transactions. None of these items had reportable income. (Y)

Part VII, line 234: This transaction was previously reported as "Buy" and is amended herein.

Part VII, line 419-422: These transactions were previously reported as "Sold" and are amended herein.

Name of Person Reporting	Date of Report
O'Toole, George A.	06/16/2025

IX. CERTIFICATION.

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. app. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ George A. O'Toole

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