Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Pepper, Pamela
U.S. District Court - Wisconsin 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/ Pepper, Pamela [electronically signed on Sep 14, 2026 4:47pm by Pepper, Pamela in JEFS]
/s/ Pepper, Pamela [electronically signed on Sep 7, 2026 11:33am by Pepper, Pamela in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Eastern District of Wisconsin Bar Association	Non-Profit	Ex-officio, Director
2.	Federal Judges Association	Non-Profit	Member, Board of Directors

II. Agreements

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

III A. Filer Non-Investment Income

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

III B. Spouse Non-Investment Income

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

IV. Reimbursements

	SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	Federal Judges Association	Apr 2, 2025	Apr 4, 2025	Philadelphia, PA	Board Meeting	Transportation, food, lodging
2.	Capitol Region Bankruptcy Bar	Nov 7, 2025	Nov 8, 2025	Cooperstown, NY	Conference Speaker	Transportation, food, lodging

V. Gifts

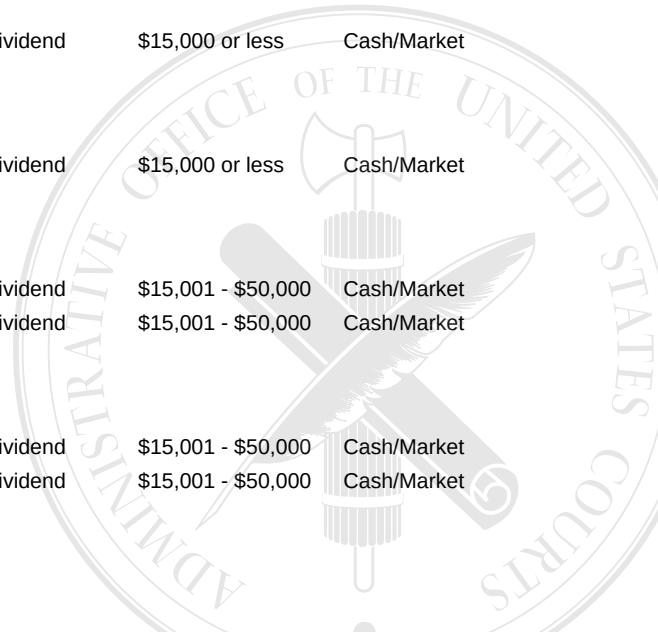
I do not have any Gifts to report
No entries in this section

VI. Liabilities

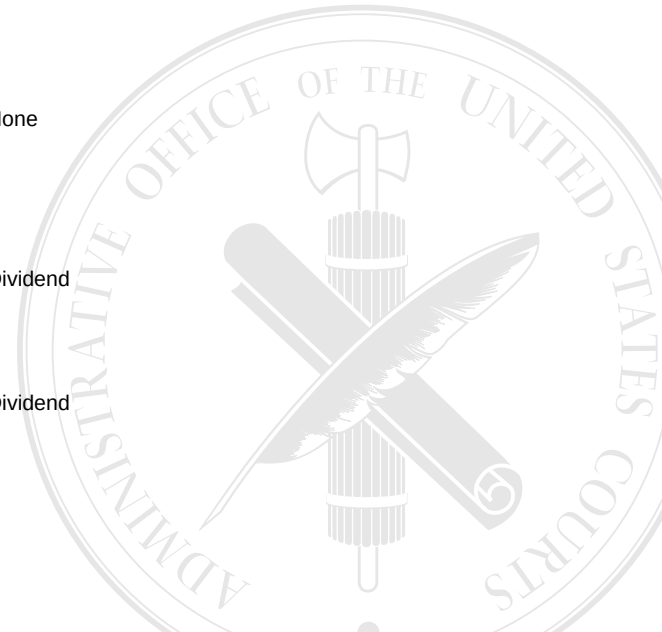
I do not have any Liabilities to report
No entries in this section

VII. Investments and Trusts

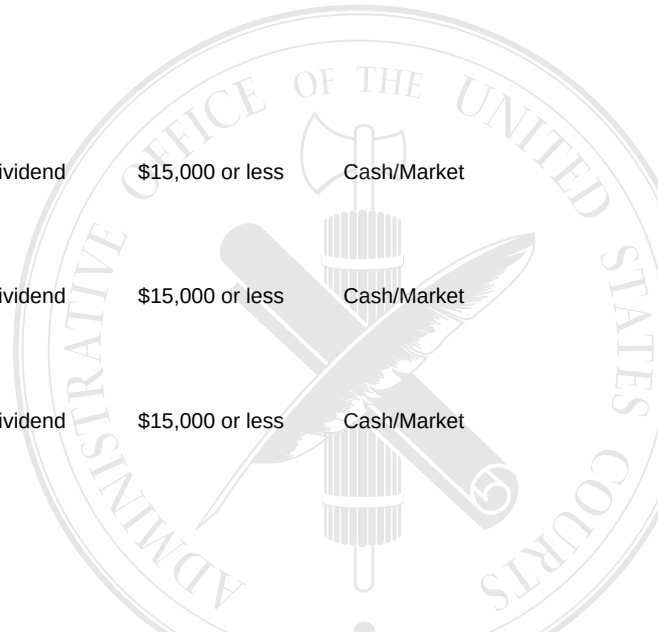
	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**(H) Individual Assets**				
1-A.	PNC Bank (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
1-B.	Agricultural Property #1, LeFlore County, MS	$2,501 - $5,000	Rent		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jan 7, 2025 $50,001 - $100,000				
1-C.	Agricultural Property #2, Carroll County, MS	$15,001 - $50,000	Rent	$15,001 - $50,000	Estimated
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 24, 2025 $250,001 - $500,000				
1-D.	Tellus Operating Group, LLC (oil and minerals, Wayne County, MS)	$1,000 or less	Distribution	$15,000 or less	Estimated
1-E.	Petco Revenue Distribution (oil and minerals, Clarke County, MS)	$1,000 or less	Rent,Royalty	$15,000 or less	Estimated
2.	**(H) Account #1**				
2-A.	iShares MSCI EAFE (EFA)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Oct 23, 2025 $15,000 or less				
2-B.	iShares Broad USD High Yield Corporate Bond ETF (USHY)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Oct 23, 2025 $15,000 or less				
2-C.	iShares Core MSCI Emerging Markets ETF (IEMG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Oct 23, 2025 $15,000 or less				
2-D.	iShares Core US Aggregate Bond (AGG)	$1,001 - $2,500	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Oct 23, 2025 $15,000 or less				
2-E.	Vanguard FTSE Dev Mkts ETF (VEA)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 11, 2025 $15,000 or less				
2-F.	Vanguard Growth ETF (VUG)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-G.	Vanguard Value Index ETF (VTV)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 11, 2025 $15,000 or less				
2-H.	Vanguard Large Cap ETF (VV)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-I.	Vanguard Mid Cap ETF (VO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Apr 11, 2025 $15,000 or less				
	(2). Buy (add'l) Jul 23, 2025 $15,000 or less				
	(3). Sold (part) Oct 23, 2025 $15,000 or less				
2-J.	Vanguard S&P 500 (VOO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Apr 11, 2025 $15,000 or less				
2-K.	Bridge Builder Core Bond (BBTBX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Apr 11, 2025 $15,000 or less				
	(2). Buy (add'l) Jul 23, 2025 $15,000 or less				
2-L.	Bridge Builder Core Plus Bond (BBCPX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-M.	Bridge Builder Intl Equity (BBIEX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
2-N.	Bridge Builder Large Growth (BBGLX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
2-O.	Bridge Builder Large Value (BBVLX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
2-P.	Bridge Builder Small/Mid Grw (BBGSX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 11, 2025 $15,000 or less				
2-Q.	Bridge Builder Small/Mid Value (BBVSX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 11, 2025 $15,000 or less				
2-R.	Dfa Intl Small Company I (DFISX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-S.	JPM Emerging Markets Equity R6 (JFAMX)		None	$15,000 or less	Cash/Market
2-T.	JPMorgan U.S. Government Money Market Fund IM Class (MGMXX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 16, 2025 $15,000 or less				
2-U.	MFS INTL New Discovery R6 (MIDAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Oct 23, 2025 $15,000 or less				
2-V.	TRowe Price Emerging Markets (PRMSX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-W.	Federated Instl HI-Yld BD R6 (FIHLX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Oct 23, 2025 $15,000 or less				
2-X.	Goldman Fs Government I (FGTXX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Oct 23, 2025 $15,000 or less				
	(2). Sold (part) Oct 24, 2025 $15,000 or less				
	(3). Sold Nov 23, 2025 $15,000 or less				
2-Y.	Invesco Intl Sm-Mid Company R6 (OSCIX)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jul 23, 2025 $15,000 or less				
	(2). Sold Oct 23, 2025 $15,000 or less				
2-Z.	Vanguard Emerging Market Govt Bond (VWOB)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jul 23, 2025 $15,000 or less				
2-AA.	Vanguard Small Cap ETF (VB)	$1,000 or less	Dividend		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jul 23, 2025 $15,000 or less				
2-AB.	American Capital World Bond F3 (WFBFX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Apr 11, 2025 $15,000 or less				
3.	**(H) Account #2**				
3-A.	Amrc Avnt SC ETF (AVDV)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jul 11, 2025 $15,000 or less				
3-B.	iShares Core S&P 500 EFT (IVV)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Apr 10, 2025 $15,000 or less				
3-C.	Vanguard Growth Index ETF (VUG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Apr 10, 2025 $15,000 or less				
	(2). Buy (add'l) Oct 29, 2025 $15,000 or less				
3-D.	Vanguard Mid Cap ETF (VO)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Apr 10, 2025 $15,000 or less				
3-E.	Artisan Intl Small-Mid I (ARTJX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-F.	Bridge Builder Core Bond (BBTBX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Mar 28, 2025 $15,000 or less				
3-G.	Bridge Builder Core Plus Bond (BBCPX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Mar 28, 2025 $15,000 or less				
3-H.	Bridge Builder Intl Equity (BBIEX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Mar 28, 2025 $15,000 or less				
3-I.	Bridge Builder Large Growth (BBGLX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Mar 28, 2025 $15,000 or less				
	(2). Sold (part) Oct 29, 2025 $15,000 or less				
3-J.	Bridge Builder Large Value (BBVLX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Mar 28, 2025 $15,000 or less				
	(2). Sold (part) Jul 11, 2025 $15,000 or less				
	(3). Sold (part) Oct 29, 2025 $15,000 or less				
3-K.	Bridge Builder Small/Mid Grw (BBGSX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 11, 2025 $15,000 or less				
3-L.	Bridge Builder Small/Mid Value (BBVSX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Mar 28, 2025 $15,000 or less				
3-M.	JPMorgan Mid Cap Equity R6 (JPPEX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 11, 2025	$15,000 or less

3-N.	JPM US Gov't Money Mkt (OGVXX)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 17, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 10, 2025	$15,000 or less
(3).	Sold	Apr 10, 2025	$15,000 or less

3-O.	MFS International Equity R6 (MIEIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-P.	PIMCO High Yield I (PHIYX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-Q.	Pimco INTL Bond I (USD-Hedged) (PFORX)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Apr 10, 2025	$15,000 or less

3-R.	iShares Russ 2000 ETF (IWM)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Apr 10, 2025	$15,000 or less

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

Additional Explanation: This is a Penn Mutual Cornerstone VUL IV Variable Life Insurance Policy. Underlying assets are reported below.

4-A.	T. Rowe Price Flexibly Managed	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
4-B.	State Street Index 500	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market

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

5-A.	Truist Bank (cash)		None	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Opened	Jun 30, 2025	$15,001 - $50,000

5-B.	Principal Financial Group Inc (PFG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-C.	American Funds Bond Fund of America A (ABNDX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Sep 10, 2025	$15,000 or less

5-D.	American Funds U.S. Govt Secs A (AMUSX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Sep 10, 2025	$15,000 or less

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

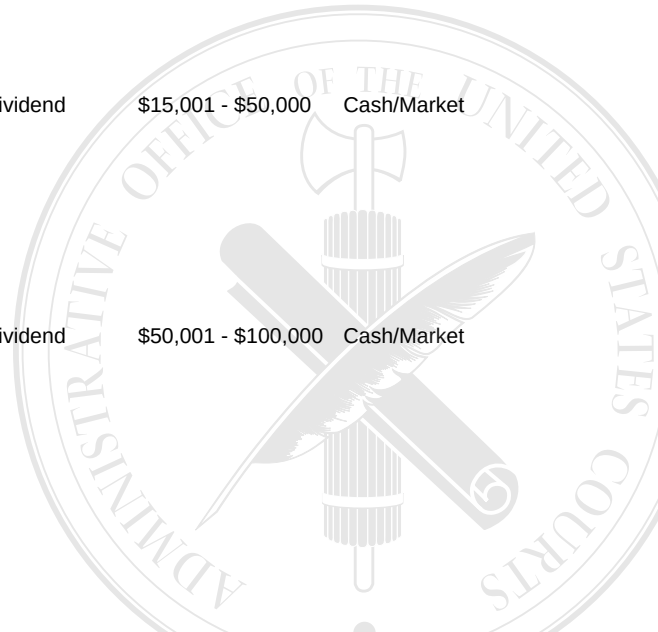
6-A.	iShares MSCI EAFE Small Cap ETF (SCZ)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 15, 2025	$15,000 or less
(3).	Buy (add'l)	Oct 30, 2025	$15,000 or less

6-B.	iShares Core Em Market (IEMG)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold (part)	Mar 25, 2025	$15,001 - $50,000
(3).	Buy (add'l)	Oct 30, 2025	$15,000 or less
(4).	Buy (add'l)	Dec 24, 2025	$15,000 or less

6-C.	iShares Core S&P 500 (IVV)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 25, 2025	$15,000 or less
(3).	Sold (part)	Jul 15, 2025	$15,000 or less
(4).	Sold (part)	Oct 30, 2025	$15,000 or less

6-D. iShares MSCI EAFE (EFA) — $1,001 - $2,500 — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 15, 2025	$15,000 or less

6-E. iShares Trust National Muni (MUB) — $2,501 - $5,000 — Dividend — $250,001 - $500,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 25, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 15, 2025	$250,001 - $500,000
(3).	Sold (part)	Oct 30, 2025	$15,000 or less
(4).	Buy (add'l)	Dec 24, 2025	$15,000 or less

6-F. iShares Rus Mid Cap ETF (IWR) — $1,000 or less — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 25, 2025	$15,000 or less
(3).	Sold (part)	Jul 15, 2025	$15,001 - $50,000
(4).	Buy (add'l)	Oct 30, 2025	$15,000 or less

6-G. iShares Russell Mid-Cap Growth ETF (IWP) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 25, 2025	$15,000 or less

6-H. iShares Russell 1000 ETF (IWB) — $1,001 - $2,500 — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold (part)	Mar 25, 2025	$15,000 or less
(3).	Sold (part)	Jul 15, 2025	$15,000 or less
(4).	Sold (part)	Oct 30, 2025	$15,000 or less

6-I. iShares S&P 100 ETF (OEF) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 25, 2025	$15,001 - $50,000
(2).	Sold (part)	Jul 15, 2025	$15,000 or less
(3).	Sold (part)	Oct 30, 2025	$15,001 - $50,000

6-J. iShares Core MSCI EAFE ETF (IEFA) — $1,000 or less — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less

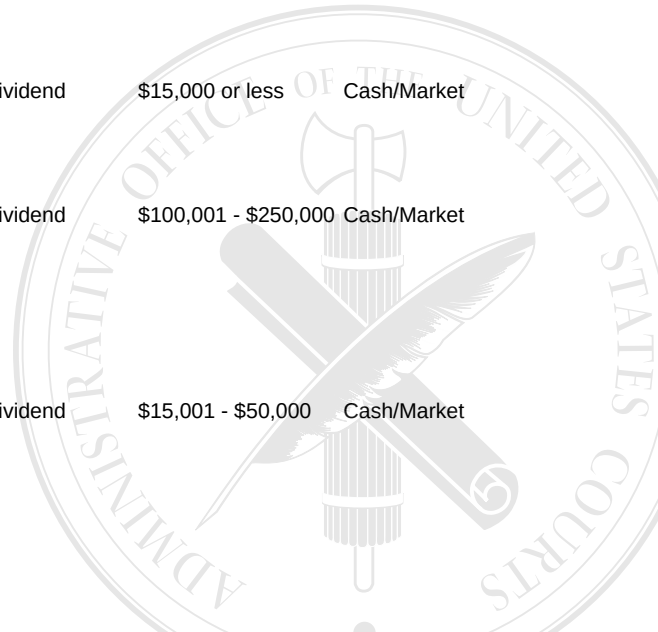
6-K. SPDR S&P MidCap 400 ETF (MDY) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 25, 2025	$15,000 or less

6-L. SPDR S&P 500 ETF (SPY) — $1,001 - $2,500 — Dividend — $100,001 - $250,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 25, 2025	$100,001 - $250,000
(2).	Sold (part)	Jul 15, 2025	$15,000 or less
(3).	Sold (part)	Oct 30, 2025	$15,000 or less

6-M. Vanguard FTSE Emerging Markets ETF (VWO) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 25, 2025	$15,001 - $50,000
(2).	Sold (part)	Jul 15, 2025	$15,000 or less
(3).	Sold (part)	Oct 30, 2025	$15,000 or less

6-N.	Vanguard Growth Index ETF (VUG)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 25, 2025	$15,000 or less
(3).	Sold (part)	Jul 15, 2025	$15,000 or less
(4).	Sold (part)	Oct 30, 2025	$15,000 or less

6-O.	Vanguard Value ETF (VTV)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold (part)	Mar 25, 2025	$15,000 or less
(3).	Buy (add'l)	Jul 15, 2025	$15,000 or less

6-P.	Vanguard Mid-Cap Index Fund ETF (VO)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 25, 2025	$15,000 or less

6-Q.	Vanguard Russell 2000 ETF (VTWO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 25, 2025	$15,001 - $50,000
(2).	Sold (part)	Jul 15, 2025	$15,000 or less
(3).	Sold (part)	Oct 30, 2025	$15,000 or less

6-R.	Vanguard Muni Bond Funds Tax Exe (VTEB)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Feb 7, 2025	$15,000 or less
(3).	Sold (part)	Mar 25, 2025	$250,001 - $500,000
(4).	Buy (add'l)	Jul 15, 2025	$100,001 - $250,000
(5).	Buy (add'l)	Oct 30, 2025	$15,000 or less

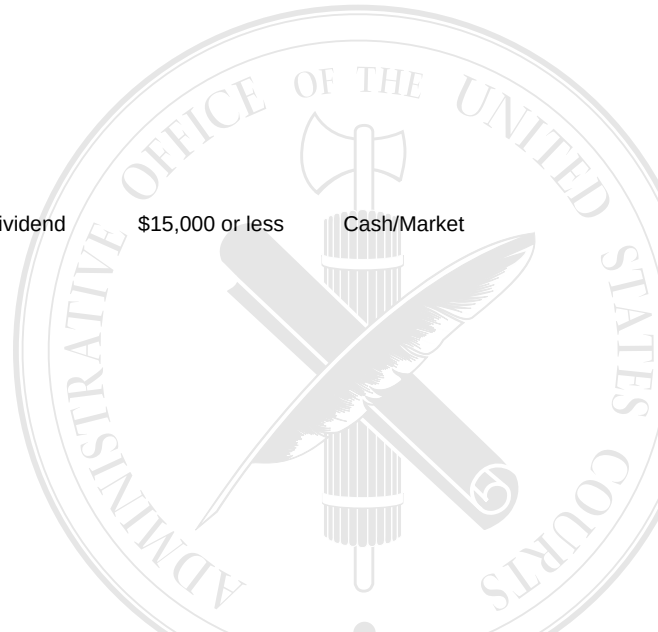
6-S.	Bridge Builder Intl Equity (BBIEX)	$1,001 - $2,500	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold (part)	Mar 25, 2025	$15,000 or less

6-T.	Bridge Builder Tr Mun High Income Bond Fund (BBMHX)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold (part)	Mar 25, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 31, 2025	$15,000 or less
(4).	Sold (part)	Jul 15, 2025	$100,001 - $250,000
(5).	Buy (add'l)	Oct 30, 2025	$50,001 - $100,000

6-U.	GS Financial Square Govt Fund (FGTXX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market



DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold (part)	Jan 18, 2025	$15,000 or less
(3).	Sold (part)	Feb 7, 2025	$15,000 or less
(4).	Sold (part)	Mar 25, 2025	$15,001 - $50,000
(5).	Buy (add'l)	Mar 25, 2025	$15,001 - $50,000
(6).	Sold (part)	Apr 8, 2025	$15,000 or less
(7).	Sold (part)	May 7, 2025	$15,000 or less
(8).	Sold (part)	Jun 6, 2025	$15,000 or less
(9).	Buy (add'l)	Jun 25, 2025	$15,000 or less
(10).	Sold (part)	Jul 11, 2025	$15,000 or less
(11).	Sold (part)	Jul 15, 2025	$15,000 or less
(12).	Buy (add'l)	Jul 15, 2025	$15,000 or less
(13).	Sold (part)	Aug 7, 2025	$15,000 or less
(14).	Sold (part)	Sep 8, 2025	$15,000 or less
(15).	Buy (add'l)	Sep 8, 2025	$15,000 or less
(16).	Sold (part)	Oct 7, 2025	$15,000 or less
(17).	Sold (part)	Nov 7, 2025	$15,000 or less
(18).	Sold (part)	Dec 5, 2025	$15,000 or less
(19).	Buy (add'l)	Dec 24, 2025	$15,000 or less

6-V. MFS Municipal High Income Fund Class R6 (MMHKX) — $1,001 - $2,500 — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 15, 2025	$100,001 - $250,000
(2).	Sold (part)	Oct 30, 2025	$50,001 - $100,000

6-W. iShares Core S&P Mid Cap ETF (IJH) — $1,000 or less — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 25, 2025	$15,000 or less

6-X. iShares Core US Aggregate Bond (AGG) — $1,000 or less — Dividend

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

6-Y. iShares Russell 2000 Growth ETF (IWO) — $1,000 or less — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold	Mar 25, 2025	$15,000 or less

6-Z. iShares Russ 2000 Value ETF (IWN) — $1,000 or less — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold	Mar 25, 2025	$15,001 - $50,000

6-AA. Bridge Builder Large Growth (BBGLX) — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold	Jul 15, 2025	$15,000 or less

6-AB. Bridge Builder Large Value (BBVLX) — $1,000 or less — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 25, 2025	$15,001 - $50,000

6-AC. Bridge Builder Small/Mid Grw (BBGSX) — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 13, 2025	$15,000 or less
(2).	Sold	Mar 25, 2025	$15,001 - $50,000

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
6-AD.	NYLI MacKay High Yield Muni Bond Fund (MMHIX)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 13, 2025	$15,000 or less
(2).	Sold	Jul 15, 2025	$15,000 or less

6-AE.	Schwab Short-Term U.S. Treasury ETF (SCHO)	$2,501 - $5,000	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 25, 2025	$250,001 - $500,000
(2).	Buy (add'l)	Mar 31, 2025	$15,000 or less
(3).	Buy (add'l)	Jun 25, 2025	$15,000 or less
(4).	Buy (add'l)	Jul 11, 2025	$15,000 or less
(5).	Sold	Jul 15, 2025	$250,001 - $500,000

6-AF.	Vanguard Mid-Cap Value (VOE)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 25, 2025	$15,000 or less

7.	**(H) Account #6**				
7-A.	Clgam 529 American Mutual A (CGFAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-B.	Clgam 529 Bond Fund of Amer A (CFAAX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-C.	Clgam 529 Cp Wrld Grw & Inc A (CWIAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-D.	Clgam 529 Intm Bond of Amer A (CBOAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-E.	Clgam 529 Sh-Trm BD of Amer A (CAAFX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

8.	**(H) Account #7**				

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

8-A.	TS 529 Voya Interm Bond A (VWTFX)		None	$15,000 or less	Cash/Market
8-B.	TS 529 Voya Interm Bond C (VWTGX)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 19, 2025	$15,000 or less

8-C.	TS 529 Voya 529 Balanced C (VWSEX)		None	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Aug 19, 2025	$15,000 or less

8-D.	TS 529 Voya Balanced A (VWSDX)		None		

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

8-E.	TS 529 Voya Ultra Cons C (VWSMX)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 19, 2025	$15,000 or less

8-F.	TS 529 Voya Ultra Cons A (VWSMX)		None	$15,000 or less	Cash/Market

VIII. Additional Information or Explanations

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