Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Peterson, James D.
U.S. District Court - Wisconsin Western
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/ Peterson, James D. [electronically signed on Sep 8, 2026 10:10am by Peterson, James D. in JEFS]
/s/ Peterson, James D. [electronically signed on Aug 4, 2026 5:27pm by Peterson, James D. in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Co- Trust No. 1 (assets listed in Part VII)	Trust	Trustee

II. Agreements

	EMPLOYER OR PARTY NAME	TERMS	AGREEMENT START MONTH	AGREEMENT START YEAR
1.	Wisconsin Retirement System Plan; balance payable at retirement	balance payable at retirement	August	1998

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

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

V. Gifts

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

VI. Liabilities

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

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**UW Credit Union cash account**	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
2.	**UW Credit Union Money Market account**	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
3.	**U.S. Savings Bonds**	$2,501 - $5,000	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Redeemed	Jul 18, 2025	$15,001 - $50,000

4.	**Charles Schwab Cash Account**	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
5.	**GK Phenonenelle Fund LLC Membership**	$1,000 or less	Interest		

Additional Explanation: GK Phenonenelle Fund Membership was liquidated; no option for liquidated, used "sold."

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

6.	**Vanguard Institutional Index**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$15,000 or less

7.	**Vanguard Target Retirement 2020**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 3, 2025	$15,000 or less

8.	**(H) IRA Account 1**				
8-A.	SPDR Bloomberg ENCD RL YLD CM ETF (CERY)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

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

8-B.	SPDR Series Trust Bloomberg Emergin Markets Fund (EBND)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 21, 2025	$15,000 or less

8-C.	Flexshares Trust Morningstar Fund (GUNR)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
8-D.	SPDR Index Shares Fund S&P Intl SmCap (GWX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
8-E.	Vaneck ETF Trust Vaneck Rare Earth Fund (REMX)	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 26, 2025	$15,001 - $50,000
(2).	Sold (part)	Aug 18, 2025	$15,000 or less
(3).	Sold (part)	Oct 17, 2025	$15,000 or less

8-F.	SPDR Index Shares Fund DJ GLB (RWO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Aug 18, 2025	$15,000 or less

8-G.	SPDR Series Trust Porfolio Fund AGRGTE (SPAB)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Jul 14, 2025	$15,001 - $50,000
(3).	Buy (add'l)	Aug 18, 2025	$15,000 or less
(4).	Buy (add'l)	Nov 18, 2025	$15,000 or less

8-H.	SPDR Index Shares Fund Portfolio Devlpd (SPDW)	$5,001 - $15,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 26, 2025	$15,000 or less
(2).	Sold (part)	Jul 14, 2025	$15,001 - $50,000

8-I.	SPDR Index Shared Fund Porfotlio Emg Mk (SPEM)	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
8-J.	SPDR Portfolio High Yield Fund (SPHY)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 21, 2025	$15,000 or less
(2).	Buy (add'l)	Nov 18, 2025	$15,000 or less

8-K.	State Street SPDR Portfl S&P 500 ETF (SPYM) f/k/a (SPLG)	$5,001 - $15,000	Dividend,Gain	$250,001 - $500,000	Cash/Market

Additional Explanation: - In 2025, fund changed its name from SPDR Series Trust Portfolio S&P 500 Fund (SPLG) to State Street SPDR Portfolio S&P 500 ETF (SPYM).

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 8, 2025	$15,000 or less
(2).	Sold (part)	Sep 19, 2025	$15,000 or less

8-L.	SPDR Series Trust Portfolio S&P 400 Mid- Cap Fund (SPMD)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,000 or less

8-M.	SPDR Portfolio S&P 600 Sm Cap Fund (SPSM)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,000 or less

8-N.	SPDR Serices Trust Portfolio LN TSR Fund (SPTL)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jul 14, 2025	$15,000 or less

8-O.	SSGA Active Blackstone Senior Loan Fund (SRLN)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 21, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 19, 2025	$15,000 or less

8-P.	SPDR Bloombrg Emg Mrk Usd Bnd ETF (EMHC)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

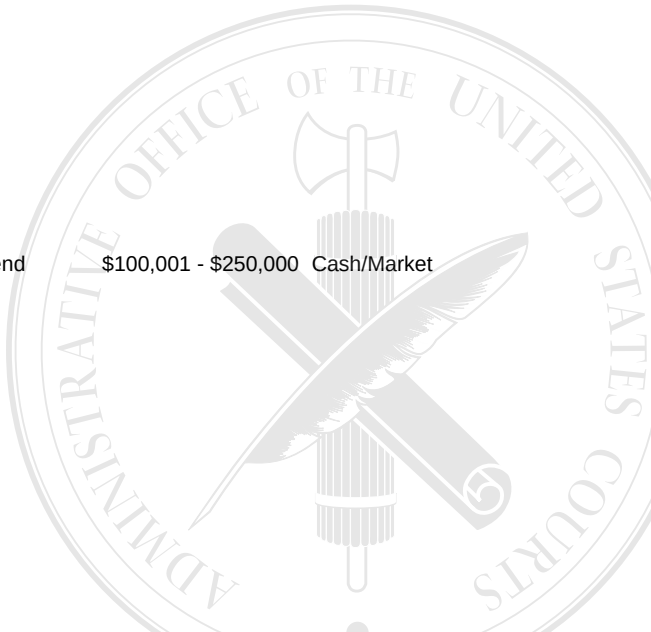
Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 21, 2025	$15,000 or less

8-Q.	Ft Alternative Abslt Rtrn Strtgy ETF (FAAR)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Oct 17, 2025 $15,000 or less				
8-R.	INVCS Actvly Mng OPTM YD (PDBC)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Jan 21, 2025 $15,001 - $50,000				
8-S.	JPMorgan Core Plus Bond (JCPB)	$1,000 or less	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 21, 2025 $15,000 or less				
	(2). Sold Apr 3, 2025 $15,001 - $50,000				
9.	**(H) Investment Account 1 (Trust)**				
9-A.	Invesco Exchange Traded Self 2025 Muni Fund (BSMP)..	$1,000 or less	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jul 14, 2025 $15,000 or less				
	(2). Buy (add'l) Oct 17, 2025 $15,000 or less				
	(3). Sold (part) Nov 18, 2025 $15,001 - $50,000				
	(4). Sold Dec 10, 2025 $15,000 or less				
9-B.	IShares MSCI USA Momntumfct ETF (MTUM)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jan 21, 2025 $15,000 or less				
9-C.	WisdomTree Trust US Value Fund EFT (WTV)..	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 21, 2025 $15,000 or less				
	(2). Sold (part) Dec 10, 2025 $15,000 or less				
9-D.	WisdomTree Trust US Mid Cap Divid ETF (DON)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 18, 2025 $15,000 or less				
	(2). Sold (part) Dec 10, 2025 $15,000 or less				
9-E.	WisdomTree Trust USCap Qty Div ETF (DGRS)..	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Apr 3, 2025 $15,000 or less				
	(2). Sold (part) Dec 10, 2025 $15,000 or less				
9-F.	Schwab Strategic TR USCap Gr ETF (SCHG)..	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Oct 17, 2025 $15,000 or less				
	(2). Sold (part) Dec 10, 2025 $15,000 or less				
9-G.	WisdomTree Trust US Large Cap Fund ETF (EPS)..	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 21, 2025 $15,000 or less				
	(2). Sold (part) Dec 10, 2025 $15,000 or less				
9-H.	WisdomTree US Efficient Core US Multifactore ETF (USMF)..	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 21, 2025 $15,000 or less				
	(2). Sold (part) Oct 17, 2025 $15,000 or less				
	(3). Sold (part) Dec 10, 2025 $15,000 or less				
9-I.	WisdomTree US Qlt Div (DGRW)..	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Dec 10, 2025 $15,000 or less				
9-J.	Invesco Exchange Traded Self 2026 Muni Fund (BSMQ)..	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 21, 2025 $15,000 or less				
	(2). Sold (part) Dec 10, 2025 $15,000 or less				
9-K.	Invesco Bletshs 2028 Mnpl Bnd ETF (BSMS)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 18, 2025 $15,001 - $50,000				
9-L.	Invesco Exchange Traded Self 2027 Muni Fund (BSMR)..	$1,000 or less	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Dec 10, 2025 $15,000 or less				
10.	**(H) IRA Account 2**				
10-A.	SPDB Bloomberg Encd Rl Yld CM ETF (CERV)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
10-B.	SPDR Series Trust Bloomberg Emerging Mar Fund (EBND).	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 21, 2025 $15,000 or less				
	(2). Sold (part) Apr 9, 2025 $15,000 or less				
	(3). Buy (add'l) Jul 2, 2025 $15,000 or less				
	(4). Buy (add'l) Sep 10, 2025 $15,000 or less				
10-C.	Flexshares Trust MorningStar UPSTR Fund (GUNR).	$2,501 - $5,000	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Sep 10, 2025 $15,000 or less				
	(2). Sold (part) Dec 17, 2025 $15,000 or less				
10-D.	SPDR Index Shares Fund S&P Intl Sm Cap (GWX).	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 23, 2025 $15,000 or less				
	(2). Sold (part) Dec 17, 2025 $15,000 or less				
10-E.	Vaneck ETF Trust Vaneck Rare Earth Fund (REMX).	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 21, 2025 $15,000 or less				
	(2). Buy (add'l) Apr 8, 2025 $15,000 or less				
	(3). Sold (part) Jul 9, 2025 $15,000 or less				
	(4). Sold (part) Jul 23, 2025 $15,000 or less				
	(5). Sold (part) Sep 3, 2025 $15,000 or less				
	(6). Sold (part) Oct 8, 2025 $15,000 or less				
	(7). Buy (add'l) Nov 5, 2025 $15,000 or less				
	(8). Sold (part) Nov 18, 2025 $15,000 or less				
10-F.	SPDR Series Trust Portfolio Fund AGRGTE (SPAB).	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 9, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 7, 2025	$15,000 or less
(3).	Buy (add'l)	Jul 2, 2025	$15,000 or less
(4).	Buy (add'l)	Jul 23, 2025	$15,000 or less
(5).	Buy (add'l)	Sep 3, 2025	$15,000 or less
(6).	Buy (add'l)	Oct 8, 2025	$15,000 or less

10-G.	SPDR Index Shares Fund DJ GLB (RWO)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
10-H.	SPDR Index Shares Fund Portfolio Devlpd (SPDW).	$5,001 - $15,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 3, 2025	$15,000 or less
(2).	Sold (part)	Apr 23, 2025	$15,000 or less
(3).	Sold (part)	May 21, 2025	$15,000 or less
(4).	Sold (part)	Dec 17, 2025	$15,000 or less

10-I.	SPDR Index Shares Fund Portfolio Emg Mt (SPEM).	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 9, 2025	$15,000 or less
(2).	Sold (part)	Nov 12, 2025	$15,000 or less

10-J.	SPDR Portfolio High Yld Fund (SPHY).	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 21, 2025	$15,000 or less
(2).	Sold (part)	Apr 9, 2025	$15,000 or less
(3).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(4).	Buy (add'l)	Nov 12, 2025	$15,000 or less

10-K.	State Street SPDR Portfl S&P 500 ETF (SPYM) f/k/a (SPLG)	$15,001 - $50,000	Dividend,Gain	$250,001 - $500,000	Cash/Market

Additional Explanation: - In 2025, fund changed its name from SPDR Series Trust Portfolio S&P 500 Fund (SPLG) to State Street SPDR Portfolio S&P 500 ETF (SPYM).

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 5, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 26, 2025	$15,000 or less
(3).	Buy (add'l)	Apr 2, 2025	$15,000 or less
(4).	Buy (add'l)	Apr 3, 2025	$15,000 or less
(5).	Sold (part)	Apr 9, 2025	$15,001 - $50,000
(6).	Buy (add'l)	Apr 23, 2025	$15,001 - $50,000
(7).	Sold (part)	May 7, 2025	$15,001 - $50,000
(8).	Sold (part)	Jun 4, 2025	$15,000 or less

10-L.	SPDR Series Trust Portfolio S&P 400 Mid Cap Fund (SPMD).	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 5, 2025	$15,000 or less
(2).	Buy (add'l)	Nov 18, 2025	$15,000 or less
(3).	Sold (part)	Dec 17, 2025	$15,000 or less

10-M.	SPDR Series Trust Portfolio S&P 600 Sm Cap Fund (SPSM).	$1,001 - $2,500	Dividend,Gain	$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)	Jan 21, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 3, 2025	$15,000 or less
(3).	Sold (part)	May 14, 2025	$15,000 or less
(4).	Buy (add'l)	Nov 18, 2025	$15,000 or less
(5).	Sold (part)	Dec 17, 2025	$15,000 or less

10-N.	SPDR Series Trust Portfolio LN TSR Fund (SPTL).	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 9, 2025	$15,000 or less
(2).	Buy (add'l)	May 7, 2025	$15,000 or less
(3).	Buy (add'l)	Jul 9, 2025	$15,000 or less
(4).	Buy (add'l)	Oct 17, 2025	$15,000 or less

10-O.	SSGA Active Blackstone Senior Loan Fund (SRLN).	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 21, 2025	$15,000 or less
(2).	Sold (part)	Apr 9, 2025	$15,000 or less
(3).	Buy (add'l)	May 14, 2025	$15,000 or less
(4).	Buy (add'l)	Oct 8, 2025	$15,000 or less

10-P.	SPDR Bloomberg Emerging Market USD Bond Fund (EMHC).	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 21, 2025	$15,000 or less
(2).	Sold (part)	Apr 9, 2025	$15,000 or less
(3).	Buy (add'l)	May 21, 2025	$15,000 or less

10-Q.	Ft Alternative Abslt Rtrn Strtgy ETF (FAAR)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
10-R.	Invesc Actvly Mgn OPTM Yd (PDBC).	$1,000 or less	Gain		

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

10-S.	JPMorgan Core Plus Bond (JCPB).	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 5, 2025	$15,000 or less
(2).	Sold	Mar 26, 2025	$15,000 or less

11.	**(H) IRA Account 3**				
11-A.	Invesc SP 500 Momentum (SPMO) -	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(2).	Sold	Apr 30, 2025	$15,000 or less

11-B.	Ishares Core MSCI (IEMG) -	$1,000 or less	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 3, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(3).	Sold	Apr 30, 2025	$15,000 or less

11-C.	Ishares Msci EAFE Growth (EFG) -	$1,000 or less	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 3, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(3).	Sold	Apr 30, 2025	$15,000 or less

11-D.	Ishares MSCI EAFE Value (EFV) -	$1,001 - $2,500	Gain		

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 3, 2025	$15,000 or less
(2).	Sold (part)	Mar 19, 2025	$15,000 or less
(3).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(4).	Sold	Apr 30, 2025	$15,000 or less

11-E. Ishares MSCI Emerging (EMXC) - $1,000 or less Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 21, 2025	$15,000 or less
(2).	Sold (part)	Mar 3, 2025	$15,000 or less
(3).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(4).	Sold	Apr 30, 2025	$15,000 or less

11-F. Ishares MSCI USA Qlty (QUAL) - $1,000 or less Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 3, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(3).	Sold	Apr 30, 2025	$15,000 or less

11-G. Ishares S&P 500 Growth (IVW) - $1,000 or less Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 5, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 19, 2025	$15,000 or less
(3).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(4).	Sold	Apr 30, 2025	$15,001 - $50,000

11-H. Ishares S&P 50 Value (IVE) - $1,000 or less Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 21, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 3, 2025	$15,000 or less
(3).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(4).	Sold	Apr 30, 2025	$15,000 or less

11-I. Ishares US (IFRA) - $1,000 or less Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 3, 2025	$15,000 or less

11-J. Ishares US Technology (IYW) - $1,000 or less Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 8, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(3).	Sold	Apr 30, 2025	$15,000 or less

11-K. Ishs US Eqty Factr (DYNF) - $1,000 or less Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 26, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(3).	Sold	Apr 30, 2025	$15,000 or less

11-L. SPDR Bloomberg ENCD RL YLD CM ETF (CERY) $1,000 or less Dividend $15,000 or less Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 30, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 18, 2025	$15,000 or less

11-M. SPDR Index Shares Emerg (SPEM) $1,000 or less Dividend,Gain $15,000 or less Cash/Market

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DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 30, 2025	$15,001 - $50,000
(2).	Sold (part)	May 7, 2025	$15,000 or less
(3).	Buy (add'l)	Jul 2, 2025	$15,000 or less
(4).	Buy (add'l)	Dec 18, 2025	$15,000 or less

11-N. SPDR Dow Jones Global (RWO) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 30, 2025	$15,000 or less
(2).	Buy (add'l)	Aug 13, 2025	$15,000 or less
(3).	Buy (add'l)	Dec 18, 2025	$15,000 or less

11-O. SPDR S&P International (GWX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 30, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 18, 2025	$15,000 or less

11-P. State Street SPDR Prtfl S&P (SPMD) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 30, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 18, 2025	$15,000 or less

11-Q. SPDR Portfolio Dvlpd (SPDW) — $1,001 - $2,500 — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 30, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 18, 2025	$15,000 or less

11-R. State Street SPDR Portfl (SPYM) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Dec 18, 2025	$15,001 - $50,000

11-S. Spdr Porfolio S&P 500 (SPLG) - — $1,000 or less — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 3, 2025	$15,000 or less
(2).	Sold (part)	Mar 3, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 5, 2025	$15,000 or less
(4).	Buy (add'l)	Apr 11, 2025	$15,001 - $50,000
(5).	Buy (add'l)	Apr 16, 2025	$15,000 or less
(6).	Buy (add'l)	Apr 30, 2025	$15,001 - $50,000
(7).	Sold (part)	Aug 13, 2025	$15,000 or less
(8).	Sold	Sep 10, 2025	$15,000 or less

11-T. State Street SPDR Frtfl S&P (SPSM) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 30, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 18, 2025	$15,000 or less

11-U. Invsc S&P 500 Top 50 ETF (XLG) — $1,000 or less — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 3, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 5, 2025	$15,000 or less
(3).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(4).	Sold	Apr 30, 2025	$15,000 or less

11-V. Ishares Currency HEDG Msci Eafe (HEFA) — $1,000 or less — Gain



DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 3, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 11, 2025	$15,000 or less
(3).	Sold	Apr 30, 2025	$15,000 or less

VIII. Additional Information or Explanations

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