Annual², 2024

Financial Disclosure Report (AO Form 10)

Filer's Information
Phillips, Mary Elizabeth
U.S. District Court - Missouri Western
District Judge

Amended Report (Amendment #2)

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/ Phillips, Mary Elizabeth [electronically signed on Feb 27, 2026 10:21am by Phillips, Mary Elizabeth in JEFS]
/s/ Phillips, Mary Elizabeth [electronically signed on Feb 26, 2026 4:16pm by Phillips, Mary Elizabeth in JEFS]

Amended Report (Amendment #1)

The source document for this amendment was signed as follows:

/s/ Phillips, Mary Elizabeth [electronically signed on Sep 12, 2025 4:13pm by Phillips, Mary Elizabeth in JEFS]
/s/ Phillips, Mary Elizabeth [electronically signed on Aug 27, 2025 4:33pm by Phillips, Mary Elizabeth in JEFS]

The source document for this amendment was signed as follows:

/s/ Phillips, Mary Elizabeth [electronically signed on Jun 4, 2025 11:00am by Phillips, Mary Elizabeth in JEFS]
/s/ Phillips, Mary Elizabeth [electronically signed on May 13, 2025 9:08am by Phillips, Mary Elizabeth in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Trust	Trust	Trustee
2.	UMKC Board of Trustees	Non-Profit	Trustee

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

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	State of Missouri- Salary			$0.00	

IV. Reimbursements

	SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	National Conference of Bankruptcy Judges	Sep 18, 2024	Sep 20, 2024	Seattle, Washington	Conference	Airfare Lodging, Food and Entertainment

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) 457(b) Plan**				
A.	MO2025 Fund	$1,001 - $2,500	Dividend	$500,001 - $1,000,000	Cash/Market
2.	**(H) Ben Edwards IRA FBO**				
	Additional Explanation: Not required to be reported last reporting year				
A.	AEPFX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
B.	Cash Account	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
C.	CSRIX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
D.	DISRX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
E.	FTRBX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
F.	FTVSX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
G.	GQG Emerg Mkt GQGIX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
H.	GQG equ fund GQEIX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
I.	HSNYX	$1,001 - $2,500	Dividend	$15,000 or less	Cash/Market
J.	Invesco Disc Fund - ODIYX		None	$15,000 or less	Cash/Market
K.	IYMIX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
L.	JVLIX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
M.	MGTIX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
N.	MWIX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
O.	NDVIX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
P.	NERYX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
Q.	OHYFX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
R.	PEMPX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
S.	VEVIX	$1,000 or less	Dividend	$15,000 or less	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
T.	WMFFX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

3. **(H) Ben Edwards TOD**

Additional Explanation: Not required to be reported last reporting year.

A.	Cash Account	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
B.	US Treasury Securities		None	$15,000 or less	Cash/Market

4. **(H) Schwab (1) Trust**

A.	Alphabet - GOOGL	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
B.	Bristol-Meyers - BMY	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 27, 2024	$15,001 - $50,000

C.	Cash Acct Schwab - SWGXX	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2024	$15,000 or less
(2).	Buy (add'l)	Jan 22, 2024	$15,000 or less
(3).	Sold (part)	Jan 22, 2024	$15,000 or less
(4).	Sold (part)	Feb 28, 2024	$15,001 - $50,000
(5).	Buy (add'l)	Mar 4, 2024	$50,001 - $100,000
(6).	Buy (add'l)	Mar 27, 2024	$15,000 or less
(7).	Sold (part)	Apr 1, 2024	$15,000 or less
(8).	Sold (part)	Apr 18, 2024	$15,000 or less
(9).	Buy	May 1, 2024	$15,000 or less
(10).	Sold (part)	May 22, 2024	$15,001 - $50,000
(11).	Buy (add'l)	Aug 12, 2024	$15,000 or less
(12).	Buy (add'l)	Aug 13, 2024	$15,000 or less
(13).	Sold (part)	Aug 15, 2024	$15,001 - $50,000
(14).	Buy (add'l)	Sep 5, 2024	$15,000 or less
(15).	Sold (part)	Nov 27, 2024	$50,001 - $100,000

D.	Colgate Palmolive - CL	$1,000 or less	Dividend	$15,000 or less	Cash/Market
E.	Diageo plc - DEO	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Nov 27, 2024	$15,000 or less

F.	Greene Co Reorg School - bond	$1,000 or less	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Redeemed	Mar 1, 2024	$50,001 - $100,000

G.	Intel - INTC	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Nov 27, 2024	$15,000 or less

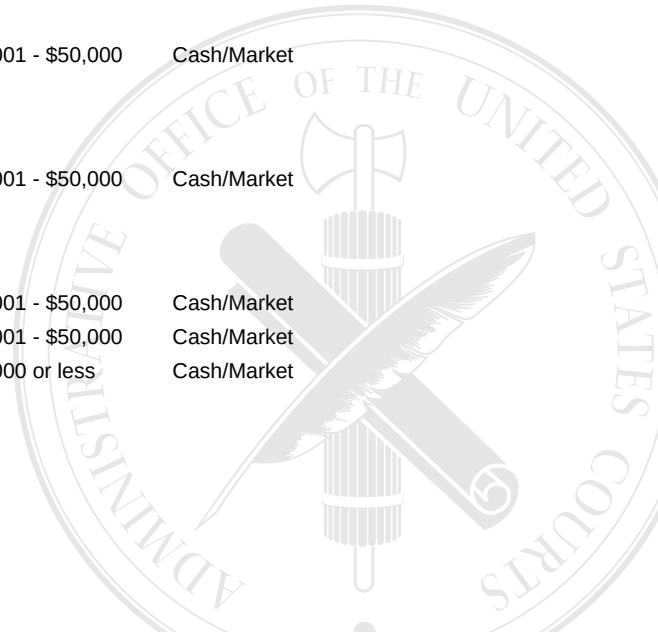
H.	Invsc SP 500 RSP	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2024	$15,001 - $50,000

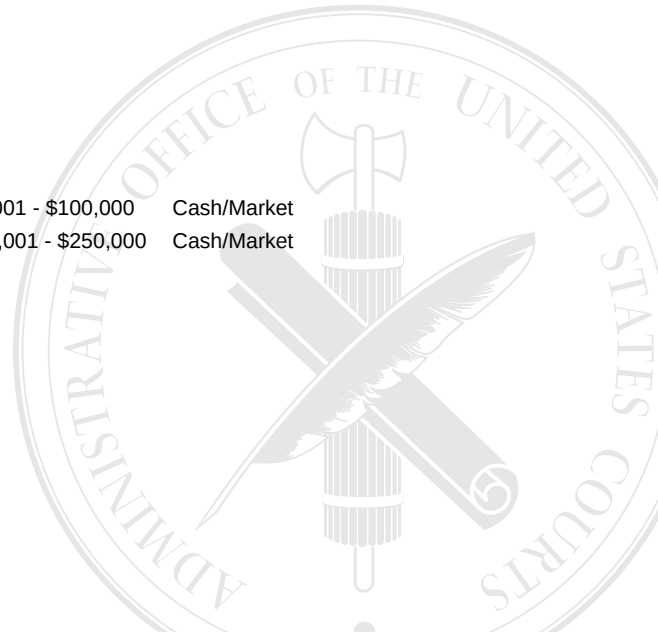
I.	IShares Hedg - HEFA	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Nov 27, 2024	$15,001 - $50,000

J.	IShares MSCI - EEM	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
K.	iShares Trust Real Estate - IYR	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
L.	Johnson & Johnson - JNJ	$1,000 or less	Dividend	$15,000 or less	Cash/Market
M.	Matt Asian Grow - MIAPX	$1,000 or less	Dividend		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 27, 2024 $15,001 - $50,000				
N.	Matt China Inst - MICFX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 27, 2024 $15,001 - $50,000				
O.	Matt Pacific Tiger - MIPTX	$1,001 - $2,500	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 27, 2024 $15,001 - $50,000				
P.	Medronic - MDT	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 27, 2024 $15,000 or less				
Q.	Microsoft - MSFT	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
R.	Missouri State Health and EDL - bond	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
S.	Nuveen Preferred NPSRX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 27, 2024 $15,001 - $50,000				
T.	Osage Sch Lake Ozark - Bond	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
U.	Pepsico - Pep	$1,000 or less	Dividend	$15,000 or less	Cash/Market
V.	Pimco - PHMIX	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 27, 2024 $15,001 - $50,000				
W.	Schwab Dividend - SCHD	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 27, 2024 $50,001 - $100,000				
X.	Taiwan Semi TSM	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 27, 2024 $15,001 - $50,000				
Y.	Union Pacific - UNP	$1,000 or less	Dividend	$15,000 or less	Cash/Market
Z.	Vang Russ Grwth -VONG	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
AA.	Vang Russ Val - VONV	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
AB.	Vang Tax mg - VTMSX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
AC.	Vanguard Dev Mkt - VEA	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
AD.	Vanguard FTSE - VWO	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
AE.	Vanguard Midcap Growth - VOT	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
AF.	Vanguard Midcap Value - VOE	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
AG.	Vanguard Prime - VPCCX	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Donated (part)				
AH.	Vanguard Sel V. - VASVX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 27, 2024 $50,001 - $100,000				
AI.	Vanguard SmCap ETF - VB	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
AJ.	Vanguard Total Stock - VTI	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 22, 2024	$15,000 or less
(2).	Buy (add'l)	Apr 4, 2024	$15,000 or less
(3).	Buy (add'l)	Apr 10, 2024	$15,000 or less
(4).	Buy (add'l)	Apr 17, 2024	$15,000 or less
(5).	Buy (add'l)	May 22, 2024	$15,001 - $50,000
(6).	Buy (add'l)	Aug 15, 2024	$15,001 - $50,000

AK.	Vanguard Utilities - VPU	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
AL.	Van Russ Growth - VTWG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

5. **(H) Schwab 2 (Roth)**

A.	AAPL	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
B.	TRowe Overseas - TROIX	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

6. **(H) Schwab 3 (Rollover)**

A.	Cash Account Schwab - SWGXX	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 27, 2024	$15,001 - $50,000
(2).	Sold (part)	Feb 28, 2024	$15,001 - $50,000

B.	Invsc SP 500 RSP	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 28, 2024	$15,001 - $50,000
(2).	Buy (add'l)	Nov 27, 2024	$15,000 or less

C.	IShares Trust Real Estate - IYR	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
D.	Johnson & Johnson - JNJ	$1,000 or less	Dividend	$15,000 or less	Cash/Market
E.	Matt Asia Div - MIPIX	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 28, 2024	$15,001 - $50,000

F.	Medtronic - MDT	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Nov 27, 2024	$15,000 or less

G.	Meta - FB	$1,000 or less	Dividend	$15,000 or less	Cash/Market
H.	Pepsico	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
I.	Schwab Dividend - SCHD	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
J.	SPDR Growth - SPYG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
K.	Union Pacific - UNP	$1,000 or less	Dividend	$15,000 or less	Cash/Market
L.	Vanguard Dev Mkt - VEA	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
M.	Vanguard FTSE - VWO	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
N.	Vanguard Midcap Growth - VOT	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
O.	Vanguard Russell - VONG	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
P.	Vanguard Russell - VTWG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
Q.	Vanguard Russell - VTWV	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
R.	Vanguard - VTI	$1,000 or less	Dividend	$15,000 or less	Cash/Market
S.	Verizon Com Inst - Bond		None	$15,001 - $50,000	Cash/Market

7. **(H) Schwab 4 (Rollover)**

A.	Cash Account Schwab - SWGXX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
B.	Invsc SP 500 RSP	$1,000 or less	Interest	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Nov 27, 2024	$15,000 or less

C.	TRASX	$1,000 or less	Dividend		

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 27, 2024 $15,000 or less				
8.	**(H) Schwab 5 (Roth)**				
A.	Cash Account Schwab - SWGXX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
B.	iShares Trust Real Estate - IYR	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
C.	Medtronic - MDT	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 27, 2024 $15,000 or less				
D.	Meta - FB	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
E.	Pepsico -PEP	$1,000 or less	Dividend	$15,000 or less	Cash/Market
F.	Schwab dividend - schd	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
G.	SPYG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
H.	TRowe Asia Opp - TRASX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 27, 2024 $15,001 - $50,000				
I.	Union Pacific - UNP	$1,000 or less	Dividend	$15,000 or less	Cash/Market
J.	Vanguard Dev Mkt - VEA	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
K.	Vanguard FTSE - VWO	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 27, 2024 $15,001 - $50,000				
L.	Vanguard Midcap Growth - VOT	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
M.	Vanguard Total Stock - VTSAX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
N.	Vanguard - VONG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
O.	Vanguard - VTWG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
P.	Vanguard - VTWV	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
Q.	Visa - V	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
9.	**(H) Trust**				
A.	Country Club Bank	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market

VIII. Additional Information or Explanations

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