Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Phillips, Mary Elizabeth
U.S. District Court - Missouri 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/ Phillips, Mary Elizabeth [electronically signed on May 22, 2026 12:10pm by Phillips, Mary Elizabeth in JEFS]
/s/ Phillips, Mary Elizabeth [electronically signed on Apr 20, 2026 5:10pm 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

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.	**(H) 457(b) Plan**				
1-A.	MO2025 Fund	$1,001 - $2,500	Dividend	$500,001 - $1,000,000	Cash/Market
2.	**(H) Ben Edwards TOD**				

Additional Explanation: This account was closed on March 26, 2025, and the assets transferred into the Schwab 1 account.

3.	**(H) Schwab (1) Trust**				
3-A.	Alphabet - GOOGL	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
3-B.	Cash Acct Schwab - SWGXX	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
3-C.	Colgate Palmolive - CL	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Sep 2, 2025	$1,000 - $15,000

3-D.	HEFA	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 28, 2025	$15,001 - $50,000

3-E.	Invsc SP 500 RSP	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
3-F.	IShares Hedg - HEFA	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
3-G.	IShares MSCI - EEM	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
3-H.	iShares Trust Real Estate - IYR	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
3-I.	Johnson & Johnson - JNJ	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	May 28, 2025	$15,000 or less

3-J.	Microsoft - MSFT	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
3-K.	Missouri State Health and EDL - bond	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
3-L.	Nuveen Preferred NPSRX	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
3-M.	Osage Sch Lake Ozark - Bond	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
3-N.	Pepsico - Pep	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	May 29, 2025	$1,000 - $15,000

3-O.	Pimco - PHMIX	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
3-P.	SCHA	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 28, 2025	$50,001 - $100,000

3-Q.	Schwab Dividend - SCHD	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
3-R.	Taiwan Semi TSM	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
3-S.	Union Pacific - UNP	$1,000 or less	Dividend	$15,000 or less	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
3-T.	US Treasury Securities		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Sep 2, 2025 $15,000 or less				
3-U.	Vang Extended Market - VXF	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Additional Explanation: Shares of this asset were transferred from the Schwab IRA FBO account on Line 8 of this report on December 19, 2025. Thus, it was not reported in this account in the previous report.				
3-V.	Vang Russ Grwth -VONG	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Donated (part)				
3-W.	Vang Russ Val - VONV	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
3-X.	Vang Sel Value - VASVX	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Additional Explanation: The asset was incorrectly reported in the 2024 report as sold. Only part of the asset was actually sold.				
3-Y.	Vang Tax mg - VTMSX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
3-Z.	Vanguard Dev Mkt - VEA	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
3-AA.	Vanguard FTSE - VWO	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
3-AB.	Vanguard Midcap Growth - VOT	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
3-AC.	Vanguard Midcap Value - VOE	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
3-AD.	Vanguard Prime - VPCCX	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
3-AE.	Vanguard SmCap ETF - VB	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 28, 2025 $50,001 - $100,000				
3-AF.	Vanguard Total Stock - VTI	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Jan 31, 2025 $15,001 - $50,000				
3-AG.	Vanguard Utilities - VPU	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
3-AH.	Van Russ Growth - VTWG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
4.	**(H) Schwab 2 (Roth)**				
4-A.	AAPL		None		
	Additional Explanation: This asset was incorrectly reported in the Schwab 2 account in the 2024 report. The asset is now reported in the correct account, Schwab 3 Rollover.				
4-B.	TRowe Overseas - TROIX	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
5.	**(H) Schwab 3 (Rollover)**				
5-A.	Apple - AAPL	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
5-B.	Cash Account Schwab - SWGXX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-C.	Invsc SP 500 RSP	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
5-D.	IShares Trust Real Estate - IYR	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
5-E.	Johnson & Johnson - JNJ	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 28, 2025 $15,000 or less				
5-F.	Meta - FB	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-G.	Pepsico	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 28, 2025 $15,000 or less				
5-H.	Schwab Dividend - SCHD	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
5-I.	SPYG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) May 28, 2025 $15,000 or less				
5-J.	Union Pacific - UNP	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-K.	Vanguard Dev Mkt - VEA	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
5-L.	Vanguard FTSE - VWO	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
5-M.	Vanguard Midcap Growth - VOT	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
5-N.	Vanguard Russell - VONG	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
5-O.	Vanguard Russell - VTWG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
5-P.	Vanguard Russell - VTWV	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
5-Q.	Vanguard - VTI	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-R.	Verizon Com Inst - Bond	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
6.	**(H) Schwab 4 (Rollover)**				
6-A.	Cash Account Schwab - SWGXX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-B.	Invsc SP 500 RSP	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7.	**(H) Schwab 5 (Roth)**				
7-A.	Cash Account Schwab - SWGXX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-B.	iShares Trust Real Estate - IYR	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
7-C.	Meta - FB	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-D.	Pepsico -PEP	$1,000 or less	Dividend		
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold	May 28, 2025	$15,000 or less	
7-E.	Schwab dividend - schd	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
7-F.	SPYG	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Buy (add'l)	May 28, 2025	$15,000 or less	
7-G.	Union Pacific - UNP	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-H.	Vanguard Dev Mkt - VEA	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
7-I.	Vanguard FTSE - VWO	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
7-J.	Vanguard Midcap Growth - VOT	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-K.	Vanguard Total Stock - VTSAX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-L.	Vanguard - VONG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-M.	Vanguard - VTWG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-N.	Vanguard - VTWV	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-O.	Visa - V	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8.	**(H) Schwab IRA FBO**				

Additional Explanation: On 3/26/2025 these assets were transferred from the Benjamin Edwards account reported in the 2024 report to a Charles Schwab Account

8-A.	AEPFX	$1,000 or less	Dividend		
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold	Nov 13, 2025	$15,001 - $50,000	
8-B.	Cash Account	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
8-C.	CSRIX	$1,000 or less	Dividend		
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold	Nov 25, 2025	$15,001 - $50,000	
8-D.	DISRX	$1,000 or less	Dividend		
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold	Nov 25, 2025	$15,001 - $50,000	
8-E.	FEUPX		None		
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Buy	Nov 13, 2025	$15,001 - $50,000	
	(2).	Sold	Nov 25, 2025	$15,001 - $50,000	
8-F.	FIXT	$1,000 or less	Dividend		

Additional Explanation: The asset was formerly MWIIX. It was converted to FIXT on 6/16/25

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,000 or less				
8-G.	FTRBX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,001 - $50,000				
8-H.	FTVSX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,000 or less				
8-I.	FWMIX		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 13, 2025 $15,001 - $50,000				
	(2). Sold Nov 25, 2025 $15,001 - $50,000				
8-J.	GQG Emerg Mkt GQGIX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,001 - $50,000				
8-K.	GQG equ fund GQEIX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,001 - $50,000				
8-L.	HEFA	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 25, 2025 $50,001 - $100,000				
8-M.	HSNIX		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 13, 2025 $15,000 or less				
	(2). Sold Nov 13, 2025 $15,000 or less				
8-N.	HSNYX	$1,001 - $2,500	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,000 or less				
8-O.	IIEFA	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 25, 2025 $50,001 - $100,000				
8-P.	Invesco Disc Fund - ODIYX		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,000 or less				
8-Q.	IYMIX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,000 or less				
8-R.	JVLIX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,001 - $50,000				
8-S.	MGTIX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Sep 25, 2025 $15,001 - $50,000				
8-T.	NDVIX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,000 or less				

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
8-U.	NERYX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,000 or less				
8-V.	OHYFX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,000 or less				
8-W.	PEBIX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 13, 2025 $15,000 or less				
	(2). Sold Nov 25, 2025 $15,000 or less				
8-X.	PEMPX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 13, 2025 $15,000 or less				
8-Y.	SCHA	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 25, 2025 $50,001 - $100,000				
8-Z.	SPY		None	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 25, 2025 $50,001 - $100,000				
8-AA.	SPYG	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Sep 25, 2025 $50,001 - $100,000				
8-AB.	VEVIX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $15,000 or less				
8-AC.	VXF	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 25, 2025 $50,001 - $100,000				
8-AD.	WMFFX	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 13, 2025 $15,001 - $50,000				
9.	**(H) Trust**				
9-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