Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Preska, Loretta A.
U.S. District Court - New York Southern
Senior 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/ Preska, Loretta A. [electronically signed on Mar 12, 2026 10:20am by Preska, Loretta A. in JEFS]
/s/ Preska, Loretta A. [electronically signed on Mar 12, 2026 10:04am by Preska, Loretta A. in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Fordham Law Alumni Association	University/College	Vice-President
2.	Trust # 11	Trust	Trustee
3.	Federalist Society, New York Chapter	Non-Profit	Advisory Board
4.	Fordham University	University/College	Trustee Emerita
5.	Trusts # 13 and #14	Trust	Co-Trustee

II. Agreements

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

III A. Filer Non-Investment Income

	SOURCE	INCOME TYPE	INCOME AMOUNT	HONORARIUM DATE
1.	RMD from IRA	Other: Other	$32,000.00	

III B. Spouse Non-Investment Income

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	Self Employed Lawyer	K-1		$0.00	
2.	RMD from IRA	Other		$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.	**Citibank - Cash Equivalent Accounts**	$1,000 or less	Interest	$250,001 - $500,000	Cash/Market
2.	**M&T Bank - Cash Equivalent Accounts**	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
3.	**(H) Trust # 10**				
A.	-Oregon St Go Bds Article X1-Q State Bonds (Y)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed	Jan 7, 2025	$50,001 - $100,000

B.	-Minneapolis Minn Go Hsg Imp Area Bonds (Y)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed	Jan 7, 2025	$100,001 - $250,000

C.	-Oregon St Dept Administrative Scvs Bonds (Y)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed	Jan 7, 2025	$15,001 - $50,000

D.	-Brunswick Cnty N C Enterprise Sys Rev Bonds (Y)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed	Jan 7, 2025	$50,001 - $100,000

E.	-Portsmouth VA Taxable Go Ref Bonds	$1,000 or less	Interest	$15,000 or less	Cash/Market
F.	-Fidelity Treasury Money Market Fund	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4.	**(H) Trust # 11**				
A.	-Durham N C Cap Fing Corp Ltd Oblig Bonds (Y)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed	Jan 7, 2025	$15,001 - $50,000

B.	-Wyandotte Cnty/Kans City Kans Uni Govt Bonds (Y)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed	Jan 7, 2025	$15,001 - $50,000

C.	-Pajaro Valley Calif Uni Sch Dist Sys Taxable Bonds (Y)		None		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed	Jan 7, 2025	$50,001 - $100,000

D.	-Honolulu Hawaii City & Cnty Wastewater Sys Bonds (Y)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed	Jan 7, 2025	$100,001 - $250,000

E.	-San Francisco Calif City & Cnty Arpts Sys Bonds (Y)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed	Jan 7, 2025	$50,001 - $100,000

F.	-Palm Beach Fla Rev Taxable Pub Impt Ref Bonds (Y)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed	Jan 7, 2025	$15,000 or less

G.	-Fidelity Treasury Money Market Fund	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

5. **(H) IRA # 9**

A.	-JP Morgan ETF Ultra Short (Y)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Sep 25, 2025	$50,001 - $100,000
(2).	Buy	May 14, 2025	$15,001 - $50,000

B.	-Oregon St Dep't Trans Hwy User Tax Bonds	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market
C.	-Wyandotte Cnty Kansas Uni Govt GO Bonds	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
D.	-Sparta NJ Bd Ed Taxable Ret School Bonds (Y)	$1,000 or less	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Redeemed	Feb 15, 2025	$100,001 - $250,000

E.	-Dallas TX Wtrwks & Sew Sys Rev Taxable Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
F.	-Pujaro Valley CA Uni Sch Dist Taxable Bonds (Y)	$1,001 - $2,500	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Redeemed	Aug 1, 2025	$50,001 - $100,000

G.	-PA St Univ Taxable Bonds (Y)	$1,001 - $2,500	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Redeemed	Sep 1, 2025	$50,001 - $100,000

H.	-MI Fin Auth Rev Taxable Hosp Ref Bonds	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
I.	-New York NY City Transitional Fin Auth Rev Bonds	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market
J.	-MN St Taxable Go Var Purp GO Bonds	$1,001 - $2,500	Interest	$100,001 - $250,000	Cash/Market
K.	-Frisco TX Comb Tax Surplus Rev CTFS Oblig Bonds (Y)	$1,001 - $2,500	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Redeemed	Feb 15, 2025	$50,001 - $100,000

L.	-Minneapolis MN Go HSG IMP Area Gen Oblig Bonds	$1,001 - $2,500	Interest	$100,001 - $250,000	Cash/Market
M.	-Metro Ore Taxable Gen Oblig Multinomah Bonds	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
N.	-Az BD Regents Univ Ariz Sys Bonds	$1,001 - $2,500	Interest	$15,000 or less	Cash/Market
O.	-Gaston Cnty NC Ltd Oblig Tax Rev Bonds	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market
P.	-NY Taxable GO Bonds Ser 2019 F-2	$5,001 - $15,000	Interest	$100,001 - $250,000	Cash/Market
Q.	-Waukesha WI Taxable Genl Oblig Ref Bonds Ser 2019 (Y)	$1,001 - $2,500	Interest		

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed Oct 1, 2025 $50,001 - $100,000				
R.	-NYS Urban Dev Corp Rev St Pers Bonds	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
S.	-Mass State Go Bonds Ser 2019 B	$5,001 - $15,000	Interest	$50,001 - $100,000	Cash/Market
T.	-VA College Bldg Auth EDL FACS Bonds (Y)	$1,000 or less	Interest		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed Feb 1, 2025 $15,001 - $50,000				
U.	-New York NY City Transitional Fin Auth Bonds (Y)	$1,001 - $2,500	Interest		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed May 1, 2025 $100,001 - $250,000				
V.	-Fidelity Govt Cash Reserves Fund	$15,001 - $50,000	Dividend	$500,001 - $1,000,000	Cash/Market
6.	**(H) IRA # 10**				
A.	-PA St. Univ Taxable Bonds (Y)	$1,000 or less	Interest		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed Sep 1, 2025 $15,001 - $50,000				
B.	-Baltimore MD Consol Pub Impt Gen Oblig Bonds (Y)	$1,000 or less	Interest		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed Oct 15, 2025 $50,001 - $100,000				
C.	-Metro ORE Taxable Genl Oblig Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
D.	-Gaston Cnty NC Gen LTD Oblig Tax Rev Bonds	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
E.	-Oregon St Dept Admin Svcs CTFS Rev Bonds	$2,501 - $5,000	Interest	$15,001 - $50,000	Cash/Market
F.	-NY NY Taxable Gen Oblig Bonds Ser 2019 F-2	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market
G.	-Kenosha Wis Taxable Genl Oblig Taxable Prom Notes	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
H.	-Oregon State Dep't Transn Hwy User Tax Bonds	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
I.	-Waukesha Wis Taxable Gen Oblig Ref Bonds Ser 2019	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
J.	-San Fran CA City & Cnty Arpts Bond	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
K.	-Mass State Go Bonds Ser 2019 B	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
L.	-CA Univ Regents Taxable Gen Rev Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
7.	**(H) IRA #11**				
A.	-Baird Aggregate Bond Fund	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Sep 25, 2025 $100,001 - $250,000				
B.	-Baird Short Term Bond Fund	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
C.	-Oregon St Dept Admin Sys Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
D.	-AZ State Univ Revs Taxable Sys Bonds	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
E.	-Curators Univ Mo Sys FAGS Rev Taxable Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
F.	-Dallas TX Area Rapid Trans Sales Tax Bonds	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
G.	-Hawaii St Taxable GO Bonds Ser 2020 F-2	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
H.	-MA St College Bldg Auth Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
I.	-Omaha Neb San Sewr Rev Taxable Sys Ref Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
J.	-JP Morgan Ultra Short Term Bond Fund (Y)	$1,001 - $2,500	Dividend		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Sep 25, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Aug 14, 2025	$15,001 - $50,000
(3).	Buy	Jan 1, 2025	$15,001 - $50,000

K.	Hays TX Cons Indpt School Dist Cabs Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
L.	-Cuyahaga Cnty OH Taxable Go Ltd Tax Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
M.	-Okla Trans Auth Ok F/K/A Ok St Bonds	$1,000 or less	Interest	$15,000 or less	Cash/Market
N.	-Univ Cal Revs Gen Rev Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
O.	-NY NY Taxable GO Bonds Ser Fiscal	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
P.	-Richmond VA Pub Util Rev Taxable Ref Bonds (Y)		None		

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

Q.	-Buncombe Cnty NC Ltd Oblig Taxable Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
R.	-Okla City OK Taxable GO Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
S.	- VA St Res Auth Infrastructure Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
T.	-Univ Hawaii Rev Taxable Rev Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
U.	-Portsmouth VA Taxable GO Ref Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
V.	-NY NY Taxable Go Bonds Ser 2019	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
W.	-NY NY GO Bonds Ser 2010 G-1	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Redeemed (part)	Sep 19, 2025	$15,001 - $50,000

X.	-Miss State Tax GO Bonds Ser 2018 B	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
Y.	-Miami-Dade Cnty Fla Aviation Rev Ref Rev Bonds (Y)	$1,001 - $2,500	Interest		

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

Z.	-Iowa Fin Auth Rev State Revenue Fund Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
AA.	-GA State GO Bonds Ser 2009 H	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
AB.	-Fla St Mun Pwr Agency Rev Ref Rev Bonds (Y)	$1,000 or less	Interest		

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

AC.	-Broward Cnty Fla Arpt Sys Taxable Rev Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
AD.	-Fidelity Govt Cash Reserves Fund	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

8. **(H) IRA #12**

A.	-Baird Aggregate Bond Fund	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 25, 2025	$100,001 - $250,000

B.	-Baird Short Term Bond Fund	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
C.	-JP Morgan ETF Ultra Short Term (Y)	$1,001 - $2,500	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Sep 25, 2025	$100,001 - $250,000
(2).	Buy (add'l)	May 12, 2025	$100,001 - $250,000
(3).	Buy	Jan 2, 2025	$15,001 - $50,000

D.	-VA College Bldg Auth Bonds (Y)	$1,000 or less	Interest		

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

E.	-Okla City OK Taxable GO Bonds	$1,000 or less	Interest	$15,000 or less	Cash/Market
F.	-NYC Transitional Fin Auth Rev Bonds (Y)	$1,000 or less	Interest		

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed May 1, 2025 $50,001 - $100,000				
G.	-MN State Taxable VAR Purp GO Bonds	$1,000 or less	Interest	$15,000 or less	Cash/Market
H.	-NY NY Taxable GO Bonds Ser Fiscal	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
I.	-Rockville MD Taxable GO Ref Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
J.	-Calif ST Univ Rev Taxable System Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
K.	-Univ Colo ENT Sys Rev Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
L.	-Frisco TX Comb Tax Surplus Rev CTFS Oblig Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
M.	-Portland Ore Taxable Go Affordable Bonds	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
N.	-Fidelity Govt Cash Reserves Fund	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
9.	**(H) -Trust #13**				
A.	-Lazard Global Listed Infrastructure Index Fund	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 13, 2025 $50,001 - $100,000				
B.	-I-Shares TR Msci USA Qlt Pct Etf	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 13, 2025 $50,001 - $100,000				
C.	-I-Shares Core S&P Total US Stk ETF	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 12, 2025 $100,001 - $250,000				
D.	-Real Prop Columbia Co NY-Parcel No.2(Purch 12/5/25 for $171,600		None	$100,001 - $250,000	Cost (Real Estate Only)
E.	-Schwab US Dividend Equity ETF (X)	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
F.	-SPDR S&P Midcap 400 Etf (X)	$2,501 - $5,000	Dividend	$500,001 - $1,000,000	Cash/Market
G.	-I-Shares Trust Core Msci Eafe Etf (X)	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
H.	-I-Shares Trust 1-3 Year Treasury Bonds	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Dec 29, 2025 $50,001 - $100,000				
	(2). Sold (part) Aug 12, 2025 $250,001 - $500,000				
I.	-Washington St Var Purp Go Bds Ser 05.00% Bonds	$1,000 or less	Interest	$15,000 or less	Cash/Market
J.	-Vermont St Go Ref Bds Ser. 2021 C 04.00% Bonds	$1,000 or less	Interest	$15,000 or less	Cash/Market
K.	-Regional Transn Disy Colo Sales Tax Rev 04.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
L.	-Pennsylvania Economic Dev Fing 05.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
M.	-Orange Cnty Fla Health Facs Auth Rev 05.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
N.	-Oklahoma Dev Fin Auth Lease Rev St 04.00% Bonds	$1,000 or less	Interest	$15,000 or less	Cash/Market
O.	-Ohio St Infrastruture Impt 05.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
P.	-New York NY City Transitional Fin 05.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
Q.	-Minneapolis Minn Spl Sch Dist No 001 Go 05.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
R.	-Milwaukee Wis Met Sew Dist Go Sys Bds 04.00%	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
S.	-Metropolitan Transn Auth N Y Dedicated 05.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
T.	-Massachusetts St Go Ref Bds Ser 2023B 05/00% Bonds	$1,000 or less	Interest	$15,000 or less	Cash/Market
U.	-Las Vegas Vy Nev tr Dist Go Ltd Tax Ref 05.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
V.	-Irving Tx Indpt Sch Dist Ultd Tax Ref 04.00% Bonds	$1,000 or less	Interest	$15,000 or less	Cash/Market
W.	-Glendale Ariz Un High Sch Dist No 205 03.25% Bonds (X)	$1,000 or less	Interest	$15,000 or less	Cash/Market
X.	-Corona Calif Pub Fin Auth Lease Rev Ref 05.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
Y.	-Connecticut St Spl Tax Oblig Rev Transn 05.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
Z.	-Bay Area Toll Auth Calif Toll Brdg Rev 04.00% Bonds	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
AA.	-Real Prop Columbia Co NY -- Parcel #1 (Purch 07/26//24 for $716,000)		None	$500,001 - $1,000,000	Cost (Real Estate Only)
AB.	-Real Property Dutchess Cnty NY (Purchased 4/25/22 for $810,000)		None	$500,001 - $1,000,000	Cost (Real Estate Only)
AC.	-Fidelity Treasury Money Market Fund	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
AD.	-SPDR S&P 500 ETF (X)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Aug 13, 2025	$50,001 - $100,000

AE.	-Fidelity 500 Index Fund (X)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

10.	**(H) Trust #14**				
A.	-Fidelity Total Market Index Fund (X)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
B.	-Fidelity 500 Index Fund (Y)	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market
C.	-Fidelity Large Cap Growth Index Fund (X)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
D.	-Lazard Global Listed Infrastructure Index Fund (X)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
E.	-Vanguard Intermediate Tax Exempt Admiral Fund (X)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
F.	-I-Shares Core S&P Total US Stock Market ETF (X)	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market
G.	-I-Shares Core S&P 500 ETF (X)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
H.	-I-Shares TR Rus 1000 Grw ETF (X)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
I.	-I-Shares Tr Msci Usa Qlt Fct (X)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
J.	-I-Shares Trust Core Msci Eafe Etf (X)	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
K.	-Spdr Etf Trust Unit Depository Receipts (X)	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
L.	-I-Shares Trust 1-3 Year Treasury Bond ETF (X)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
M.	-Vanguard Scottsdale Funds Short-Term (X)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
N.	-Fidelity Treasury Money Market Fund (X)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
O.	-Vanguard Limited Term Tax Exempt Admiral Fund (X)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
P.	-Fidelity Contrafund	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market

VIII. Additional Information or Explanations

	ADDITIONAL INFORMATION OR EXPLANATION
1.	I became a Co-Trustee of Trust #14 on May 20, 2025. The positions reported were held by that Trust at that date. There were no transactions in that Trust between May 20 and December 31, 2025. Although I am a Co-Trustee of that Trust, I receive no income, nor do I have a beneficial interest in the principal or income from that trust. Therefore, it appears that Trust 14 is governed by the precise example set forth on page 86 of the Filing Instructions (Revised September 2025) (which is consistent with page 62). However, that position is contradicted by an email dated April 4, 2025 from an attorney advisor for the Committee on Financial Disclosure responding to a letter from me dated March 31, 2025. Accordingly, I have herein followed the guidance of the attorney advisor, although that letter appears to contradict the Instructions. The same description and application of the Instructions is also applicable to Trust # 13 (albeit that trust had transactions in 2025).