**Annual, 2025**

## Financial Disclosure Report (AO Form 10)

**Filer's Information**
**Sullivan, Emmet G.**
U.S. District Court - District of Columbia
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/ Sullivan, Emmet G. [electronically signed on Sep 29, 2026 11:06am by Sullivan, Emmet G. in JEFS]**
**/s/ Sullivan, Emmet G. [electronically signed on Jul 10, 2026 1:20pm by Sullivan, Emmet G. in JEFS]**

### I. Positions

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

### II. Agreements

| | EMPLOYER OR PARTY NAME | TERMS | AGREEMENT START MONTH | AGREEMENT START YEAR |
|---|---|---|---|---|
| 1. | D.C. Government | Defined benefit pension plan | | 1994 |

### III A. Filer Non-Investment Income

| | SOURCE | INCOME TYPE | INCOME AMOUNT | HONORARIUM DATE |
|---|---|---|---|---|
| 1. | D.C. Government | Fixed Retirement / Pension Benefits | $82,799.28 | |

### 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. | **(H) Individual Assets** | | | | |
| 1-A. | Wells Fargo (cash) | $1,000 or less | Interest | $50,001 - $100,000 | Cash/Market |
| 2. | **(H) Account #1** | | | | |
| 2-A. | Janney Sweep Account (cash) | $1,001 - $2,500 | Interest | $100,001 - $250,000 | Cash/Market |
| 2-B. | Alphabet Inc Cl A (GOOGL) | $15,001 - $50,000 | Dividend,Gain | $50,001 - $100,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jan 6, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Sep 19, 2025 $15,001 - $50,000 | | | | |
| 2-C. | Arthur Gallagher & Co (AJG) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 4, 2025 $15,001 - $50,000 | | | | |
| | (2). Sold Oct 29, 2025 $15,001 - $50,000 | | | | |
| 2-D. | Amazon.com Inc (AMZN) | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 2-E. | Apple Inc (AAPL) | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 2-F. | Boston Scientific Corp (BSX) | | None | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Mar 20, 2025 $15,001 - $50,000 | | | | |
| 2-G. | Broadcom Inc (AVGO) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy May 15, 2025 $15,001 - $50,000 | | | | |
| 2-H. | Cheniere Energy Inc (LNG) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 2-I. | Diamondback Energy Inc (FANG) | $5,001 - $15,000 | Dividend,Gain | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Apr 4, 2025 $15,001 - $50,000 | | | | |
| 2-J. | Ferrari NV (RACE) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 2-K. | JPMorgan Chase & Co (JPM) | $5,001 - $15,000 | Dividend,Gain | $50,001 - $100,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) May 21, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Sep 19, 2025 $15,001 - $50,000 | | | | |
| 2-L. | Lam Research Corp (LRCX) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Apr 4, 2025 $15,001 - $50,000 | | | | |
| 2-M. | LPL Financial Holdings (LPLA) | | None | $50,001 - $100,000 | Cash/Market |

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

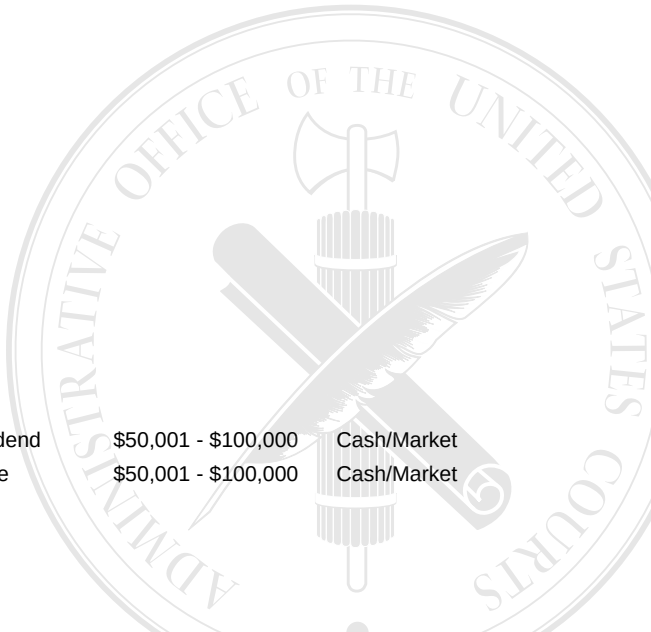
| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Dec 4, 2025 $50,001 - $100,000 | | | | |
| 2-N. | Microsoft Corp (MSFT) | $15,001 - $50,000 | Dividend,Gain | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jan 6, 2025 $15,000 or less | | | | |
| | (2). Sold (part) May 21, 2025 $15,000 or less | | | | |
| | (3). Sold (part) Sep 19, 2025 $15,001 - $50,000 | | | | |
| 2-O. | Nvidia Corp (NVDA) | $15,001 - $50,000 | Dividend,Gain | $50,001 - $100,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Sep 19, 2025 $15,001 - $50,000 | | | | |
| 2-P. | O'Reilly Automotive Inc (ORLY) | $15,001 - $50,000 | Gain | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Sep 19, 2025 $50,001 - $100,000 | | | | |
| 2-Q. | Palo Alto Networks Inc (PANW) | | None | $50,001 - $100,000 | Cash/Market |
| 2-R. | Parker-Hannifin Corp (PH) | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 2-S. | Quanta Services Inc (PWR) | $15,001 - $50,000 | Dividend,Gain | $50,001 - $100,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jan 6, 2025 $15,001 - $50,000 | | | | |
| | (2). Sold (part) May 21, 2025 $15,000 or less | | | | |
| | (3). Sold (part) Sep 19, 2025 $15,001 - $50,000 | | | | |
| 2-T. | S&P Global Inc (SPGI) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 2-U. | Spotify Technology (SPOT) | | None | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 28, 2025 $15,001 - $50,000 | | | | |
| | (2). Buy (add'l) Apr 29, 2025 $15,000 or less | | | | |
| | (3). Sold Dec 4, 2025 $15,001 - $50,000 | | | | |
| 2-V. | Thermo Fisher Scientific (TMO) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Mar 20, 2025 $15,001 - $50,000 | | | | |
| 2-W. | Unitedhealth Group Inc (UNH) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold May 15, 2025 $15,001 - $50,000 | | | | |
| 2-X. | Visa Inc (V) | $5,001 - $15,000 | Dividend,Gain | $50,001 - $100,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) May 21, 2025 $15,000 or less | | | | |
| 2-Y. | First Trust Large Cap Core Alphadex ETF (FEX) | $2,501 - $5,000 | Dividend | $250,001 - $500,000 | Cash/Market |
| 2-Z. | First Trust Small Cap Core Alphadex ETF (FYX) | $1,001 - $2,500 | Dividend,Gain | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jan 6, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Apr 11, 2025 $15,001 - $50,000 | | | | |
| | (3). Buy (add'l) Oct 29, 2025 $15,001 - $50,000 | | | | |
| 2-AA. | iShares 20+ Yr Treasury Bond ETF (TLT) | | None | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 4, 2025 $15,001 - $50,000 | | | | |
| | (2). Sold Apr 9, 2025 $15,001 - $50,000 | | | | |
| 2-AB. | Vanguard S&P 500 Index ETF (VOO) | $1,001 - $2,500 | Dividend | $100,001 - $250,000 | Cash/Market |
| 2-AC. | JPMorgan Core Plus Bond Cl I (HLIPX) | $2,501 - $5,000 | Dividend | $100,001 - $250,000 | Cash/Market |



| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Sep 19, 2025 $50,001 - $100,000 | | | | |
| 2-AD. | PGIM Total Return Bond Cl Z (PDBZX) | $5,001 - $15,000 | Dividend | $100,001 - $250,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Sep 19, 2025 $15,001 - $50,000 | | | | |
| 2-AE. | Putnam Ultra Short Duration Income Y (PSDYX) | $1,001 - $2,500 | Dividend,Gain | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Sep 19, 2025 $15,001 - $50,000 | | | | |
| 3. | **(H) Account #2** | | | | |
| 3-A. | Alphabet Inc Cl A (GOOGL) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-B. | Amazon.com Inc (AMZN) | | None | $15,000 or less | Cash/Market |
| 3-C. | Apple Inc (AAPL) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-D. | Arthur Gallagher & Co (AJG) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 4, 2025 $15,000 or less | | | | |
| | (2). Sold Oct 29, 2025 $15,000 or less | | | | |
| 3-E. | Boston Scientific Corp (BSX) | | None | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Mar 20, 2025 $15,000 or less | | | | |
| 3-F. | Broadcom Inc (AVGO) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy May 15, 2025 $15,000 or less | | | | |
| 3-G. | Cheniere Energy Inc (LNG) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-H. | Diamondback Energy Inc (FANG) | $1,000 or less | Dividend,Gain | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Apr 4, 2025 $15,000 or less | | | | |
| 3-I. | Ferrari NV (RACE) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-J. | JPMorgan Chase & Co (JPM) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-K. | Lam Research Corp (LRCX) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Apr 4, 2025 $15,000 or less | | | | |
| 3-L. | LPL Financial Holdings (LPLA) | | None | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Dec 4, 2025 $15,000 or less | | | | |
| 3-M. | Microsoft Corp (MSFT) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-N. | Nvidia Corp (NVDA) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-O. | O'Reilly Automotive Inc (ORLY) | | None | $15,000 or less | Cash/Market |
| 3-P. | Palo Alto Networks (PANW) | | None | $15,000 or less | Cash/Market |
| 3-Q. | Parker-Hannifin Corp (PH) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-R. | Quanta Services Inc (PWR) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-S. | S&P Global Inc (SPGI) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-T. | Spotify Technology (SPOT) | | None | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 28, 2025 $15,000 or less | | | | |
| | (2). Buy (add'l) Apr 29, 2025 $15,000 or less | | | | |
| | (3). Sold Dec 4, 2025 $15,000 or less | | | | |
| 3-U. | Thermo Fisher Scientific Inc (TMO) | $1,000 or less | Dividend | | |



| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold Mar 20, 2025 $15,000 or less | | | | |
| 3-V. | Unitedhealth Group Inc (UNH) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold May 15, 2025 $15,000 or less | | | | |
| 3-W. | Visa Inc (V) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-X. | First Trust Large Cap Core Alphadex ETF (FEX) | $1,000 or less | Dividend,Gain | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Sep 19, 2025 $15,000 or less | | | | |
| 3-Y. | First Trust Small Cap Alphadex ETF (FYX) | $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). Buy (add'l) Oct 29, 2025 $15,000 or less | | | | |
| 3-Z. | iShares 20+ Yr Treasury Bond ETF (TLT) | | None | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 4, 2025 $15,000 or less | | | | |
| | (2). Sold Apr 9, 2025 $15,000 or less | | | | |
| 3-AA. | Vanguard S&P 500 ETF (VOO) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 3-AB. | JPMorgan Core Plus Bond Cl I (HLIPX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-AC. | PGIM Total Return Bond Cl Z (PDBZX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 3-AD. | Putnam Ultra Short Duration Income Y (PSDYX) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| 4. | **(H) Account #3** | | | | |
| 4-A. | Dreyfus Govt Cash Mgmt (DGQXX) (cash eq.) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Sold (part) Jan 3, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Feb 3, 2025 $15,000 or less | | | | |
| | (3). Buy (add'l) Feb 14, 2025 $15,000 or less | | | | |
| | (4). Sold (part) Mar 3, 2025 $15,000 or less | | | | |
| | (5). Sold (part) Mar 19, 2025 $15,000 or less | | | | |
| | (6). Buy (add'l) Apr 2, 2025 $15,000 or less | | | | |
| | (7). Sold (part) Apr 3, 2025 $15,000 or less | | | | |
| | (8). Buy (add'l) Apr 10, 2025 $15,001 - $50,000 | | | | |
| | (9). Buy (add'l) Apr 14, 2025 $15,001 - $50,000 | | | | |
| | (10). Sold (part) Apr 23, 2025 $15,000 or less | | | | |
| | (11). Sold (part) May 2, 2025 $15,000 or less | | | | |
| | (12). Sold (part) May 16, 2025 $15,000 or less | | | | |
| | (13). Buy (add'l) Jun 2, 2025 $15,000 or less | | | | |
| | (14). Sold (part) Jun 3, 2025 $15,000 or less | | | | |
| | (15). Buy (add'l) Jul 1, 2025 $15,000 or less | | | | |
| | (16). Sold (part) Jul 2, 2025 $15,000 or less | | | | |
| | (17). Sold (part) Jul 3, 2025 $15,000 or less | | | | |
| | (18). Sold (part) Jul 31, 2025 $15,000 or less | | | | |
| | (19). Sold (part) Aug 1, 2025 $15,000 or less | | | | |
| | (20). Buy (add'l) Sep 17, 2025 $15,000 or less | | | | |
| | (21). Buy (add'l) Sep 29, 2025 $15,000 or less | | | | |
| | (22). Sold (part) Oct 2, 2025 $15,000 or less | | | | |
| | (23). Sold (part) Oct 3, 2025 $15,000 or less | | | | |
| | (24). Sold Oct 22, 2025 $15,000 or less | | | | |
| 4-B. | Alphabet Inc Cl A (GOOGL) | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 4-C. | Amazon.com Inc (AMZN) | | None | $50,001 - $100,000 | Cash/Market |



| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 4-D. | Amphenol Corp (APH) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Apr 22, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 4-E. | Apple Inc (AAPL) | $15,001 - $50,000 | Dividend,Gain | $50,001 - $100,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Apr 2, 2025 | $15,001 - $50,000 |
| (2). | Sold (part) | Oct 29, 2025 | $15,000 or less |
| (3). | Sold (part) | Nov 25, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 4-F. | Applovin Corp (APP) | $15,001 - $50,000 | Dividend,Gain | $50,001 - $100,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Feb 13, 2025 | $15,000 or less |
| (2). | Sold (part) | Jul 1, 2025 | $15,000 or less |
| (3). | Sold (part) | Sep 2, 2025 | $15,000 or less |
| (4). | Sold (part) | Sep 16, 2025 | $15,000 or less |
| (5). | Sold (part) | Oct 29, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 4-G. | Arthur Gallagher & Co (AJG) | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Apr 4, 2025 | $15,001 - $50,000 |
| (2). | Buy (add'l) | Apr 29, 2025 | $15,000 or less |
| (3). | Sold | Oct 29, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 4-H. | Arista Networks (ANET) | | None | $15,001 - $50,000 | Cash/Market |

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

| | | | | | |
|---|---|---|---|---|---|
| 4-I. | Boston Scientific Corp (BSX) | | None | $15,001 - $50,000 | Cash/Market |
| 4-J. | Broadcom Inc (AVGO) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

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

| | | | | | |
|---|---|---|---|---|---|
| 4-K. | Cadence Design Systems Inc (CDNS) | | None | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Apr 4, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 4-L. | Cheniere Energy Inc (LNG) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 4-M. | Costco Wholesale Corp (COST) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 4-N. | Deere and Co (DE) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 4-O. | Diamondback Energy Inc (FANG) | $5,001 - $15,000 | Dividend,Gain | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Apr 4, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 4-P. | Eli Lilly & Co (LLY) | $1,000 or less | Dividend | $50,001 - $100,000 | Cash/Market |
| 4-Q. | Ferrari NV (RACE) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 4-R. | Flex Ltd (FLEX) | | None | $50,001 - $100,000 | Cash/Market |
| 4-S. | Graphic Packaging Holding Co (GPK) | $1,001 - $2,500 | Dividend,Gain | | |

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

| | | | | | |
|---|---|---|---|---|---|
| 4-T. | Hexcel Corp (HXL) | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Mar 18, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 4-U. | Howmet Aerospace Inc (HWM) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

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

| | | | | | |
|---|---|---|---|---|---|
| 4-V. | JPMorgan Chase & Company (JPM) | $1,001 - $2,500 | Dividend | $50,001 - $100,000 | Cash/Market |

| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 4-W. | Lam Research Corp (LRCX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 4-X. | LPL Financial Holdings (LPLA) | | None | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Dec 4, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 4-Y. | Microsoft Corp (MSFT) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 4-Z. | Nvidia Corp (NVDA) | $15,001 - $50,000 | Dividend,Gain | $50,001 - $100,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 2, 2025 | $15,000 or less |
| (2). | Sold (part) | Jul 1, 2025 | $15,000 or less |
| (3). | Sold (part) | Jul 30, 2025 | $15,000 or less |
| (4). | Sold (part) | Oct 29, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 4-AA. | O'Reilly Automotive Inc (ORLY) | | None | $15,001 - $50,000 | Cash/Market |
| 4-AB. | Palo Alto Networks (PANW) | | None | $15,001 - $50,000 | Cash/Market |
| 4-AC. | Quanta Services Inc (PWR) | $5,001 - $15,000 | Dividend | $50,001 - $100,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Jun 2, 2025 | $15,000 or less |
| (2). | Sold (part) | Jul 1, 2025 | $15,000 or less |
| (3). | Sold (part) | Jul 30, 2025 | $15,000 or less |
| (4). | Sold (part) | Oct 29, 2025 | $15,000 or less |
| (5). | Sold (part) | Nov 25, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 4-AD. | S&P Global Inc (SPGI) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 4-AE. | Spotify Technology (SPOT) | | None | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Mar 19, 2025 | $15,001 - $50,000 |
| (2). | Buy (add'l) | Apr 29, 2025 | $15,000 or less |
| (3). | Sold | Dec 4, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 4-AF. | Thermo Fisher Scientific Inc (TMO) | $2,501 - $5,000 | Dividend,Gain | | |

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

| | | | | | |
|---|---|---|---|---|---|
| 4-AG. | United Rentals Inc (URI) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 4-AH. | Unitedhealth Group Inc (UNH) | $2,501 - $5,000 | Dividend,Gain | | |

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

| | | | | | |
|---|---|---|---|---|---|
| 4-AI. | Vertex Pharmaceuticals (VRTX) | | None | $15,001 - $50,000 | Cash/Market |
| 4-AJ. | Visa Inc (V) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 4-AK. | iShares 20+ Yr Treasury Bond ETF (TLT) | | None | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Apr 4, 2025 | $15,001 - $50,000 |
| (2). | Sold | Apr 9, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 4-AL. | First Trust Small Cap Core Alphadex ETF (FYX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold (part) | Apr 11, 2025 | $15,001 - $50,000 |
| (2). | Buy (add'l) | Oct 29, 2025 | $15,001 - $50,000 |

| | | | | | |
|---|---|---|---|---|---|
| 5. | **(H) Account #4** | | | | |
| 5-A. | Janney Sweep Account (cash) | $1,000 or less | Interest | $15,001 - $50,000 | Cash/Market |
| 5-B. | Alphabet Inc Cl A (GOOGL) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Mar 10, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-C. | Amazon.com Inc (AMZN) | | None | $15,001 - $50,000 | Cash/Market |

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| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-D. | Amphenol Corp (APH) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 22, 2025 $15,000 or less | | | | |
| 5-E. | Apple Inc (AAPL) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-F. | Applovin Corp (APP) | $5,001 - $15,000 | Dividend,Gain | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| | (2). Sold (part) Jun 10, 2025 $15,000 or less | | | | |
| | (3). Sold (part) Sep 16, 2025 $15,000 or less | | | | |
| 5-G. | Arista Networks Inc (ANET) | | None | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy May 23, 2025 $15,000 or less | | | | |
| | (2). Buy (add'l) May 28, 2025 $15,000 or less | | | | |
| 5-H. | Arthur Gallagher & Co (AJG) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Apr 4, 2025 $15,000 or less | | | | |
| | (2). Buy (add'l) Apr 29, 2025 $15,000 or less | | | | |
| | (3). Sold Oct 29, 2025 $15,000 or less | | | | |
| 5-I. | Boston Scientific Corp (BSX) | | None | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-J. | Broadcom Inc (AVGO) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy May 15, 2025 $15,001 - $50,000 | | | | |
| 5-K. | Cadence Design Systems Inc (CDNS) | | None | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| | (2). Sold Apr 4, 2025 $15,000 or less | | | | |
| 5-L. | Cheniere Energy Inc (LNG) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-M. | Costco Wholesale Corp (COST) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-N. | Deere & Co (DE) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-O. | Diamondback Energy Inc (FANG) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Mar 10, 2025 $15,000 or less | | | | |
| | (2). Sold Apr 4, 2025 $15,000 or less | | | | |
| 5-P. | Eli Lilly & Co (LLY) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

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| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-Q. | Emcor Group Inc (EME) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Jan 2, 2025 $15,000 or less | | | | |
| | (2). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| | (3). Sold Apr 4, 2025 $15,000 or less | | | | |
| 5-R. | Ferrari NV (RACE) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-S. | Flex Ltd (FLEX) | | None | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-T. | Graphic Packaging Holding Co (GPK) | $1,000 or less | Dividend,Gain | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| | (2). Sold Mar 19, 2025 $15,000 or less | | | | |
| 5-U. | Hexcel Corp (HXL) | $1,000 or less | Dividend | | |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| | (2). Sold Mar 18, 2025 $15,000 or less | | | | |
| 5-V. | Howmet Aerospace Inc (HWM) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Mar 18, 2025 $15,000 or less | | | | |
| 5-W. | JPMorgan Chase & Company (JPM) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-X. | Lam Research Corp (LRCX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| | (2). Buy (add'l) Jun 10, 2025 $15,000 or less | | | | |
| 5-Y. | LPL Financial Holdings (LPLA) | | None | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy Dec 4, 2025 $15,001 - $50,000 | | | | |
| 5-Z. | Microsoft Corp (MSFT) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-AA. | Nvidia Corp (NVDA) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| 5-AB. | O'Reilly Automotive Inc (ORLY) | | None | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-AC. | Palo Alto Networks Inc (PANW) | | None | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |
| 5-AD. | Quanta Services Inc (PWR) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |
| | **Transactions** **Transaction Type** **Transaction Date** **Transaction Value** | | | | |
| | (1). Buy (add'l) Mar 10, 2025 $15,000 or less | | | | |

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| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 5-AE. | S&P Global Inc (SPGI) | $1,000 or less | Dividend | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Mar 10, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-AF. | Spotify Technology (SPOT) | | None | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Mar 19, 2025 | $15,000 or less |
| (2). | Buy (add'l) | Apr 29, 2025 | $15,000 or less |
| (3). | Sold | Dec 4, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-AG. | Thermo Fisher Scientific (TMO) | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Mar 10, 2025 | $15,000 or less |
| (2). | Sold | May 28, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-AH. | Toll Brothers Inc (TOLL) | | None | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Sold | Jan 2, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-AI. | United Rentals Inc (URI) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Mar 10, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-AJ. | Unitedhealth Group Inc (UNH) | $1,000 or less | Dividend | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Mar 10, 2025 | $15,000 or less |
| (2). | Sold | May 15, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-AK. | Vertex Pharmaceuticals (VRTX) | | None | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Mar 10, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-AL. | Visa Inc (V) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Mar 10, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-AM. | iShares 20+ Yr Treasury Bond ETF (TLT) | | None | | |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Apr 4, 2025 | $15,000 or less |
| (2). | Sold | Apr 9, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-AN. | First Trust Small Cap Core Alphadex ETF (FYX) | $1,000 or less | Dividend | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Mar 10, 2025 | $15,000 or less |
| (2). | Sold (part) | Apr 11, 2025 | $15,000 or less |
| (3). | Buy (add'l) | Jun 10, 2025 | $15,000 or less |
| (4). | Buy (add'l) | Oct 29, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 5-AO. | Putnum Ultra Short Duration Income Cl Y (PSDYX) | $2,501 - $5,000 | Dividend | $50,001 - $100,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy | Mar 7, 2025 | $100,001 - $250,000 |
| (2). | Sold (part) | Mar 12, 2025 | $50,001 - $100,000 |
| (3). | Sold (part) | May 23, 2025 | $15,000 or less |

| | | | | | |
|---|---|---|---|---|---|
| 6. | **(H) Account #5** | | | | |
| 6-A. | Janney Insured Sweep (cash) | $1,000 or less | Interest | $15,000 or less | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Opened | Sep 30, 2025 | $15,000 or less |

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| | DESCRIPTION | INCOME AMOUNT | INCOME TYPE | GROSS VALUE | VALUE METHOD |
|---|---|---|---|---|---|
| 6-B. | Jones Lang Lasalle Income Property Tr Operat Units | $15,001 - $50,000 | Distribution | $500,001 - $1,000,000 | Cash/Market |

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

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

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

| | | | | | |
|---|---|---|---|---|---|
| 7-A. | American Funds Growth Fund of America Cl 529 A (CGFAX) | | None | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Jan 7, 2025 | $15,001 - $50,000 |

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

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

| | | | | | |
|---|---|---|---|---|---|
| 8-A. | American Funds Growth Fund of America Cl 529 A (CGFAX) | | None | $15,001 - $50,000 | Cash/Market |

| Transactions | Transaction Type | Transaction Date | Transaction Value |
|---|---|---|---|
| (1). | Buy (add'l) | Jan 7, 2025 | $15,001 - $50,000 |

## VIII. Additional Information or Explanations

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