Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Talwani, Indira
U.S. District Court - Massachusetts
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/ Talwani, Indira [electronically signed on Sep 12, 2026 5:11pm by Talwani, Indira in JEFS]
/s/ Talwani, Indira [electronically signed on Sep 10, 2026 1:12pm by Talwani, Indira in JEFS]

I. Positions

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

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.	SEIU Affiliates	Pension	No	$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) Individual Assets**				
1-A.	Citizens Bank (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
1-B.	Charles Schwab (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
2.	**(H) Account #1**				
2-A.	Colmb Res Cr ETF	$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
(2).	Buy (add'l)	Oct 30, 2025	$15,000 or less

2-B.	iShares Core Dividend Growth ETF (DGRO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 9, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Apr 22, 2025	$15,000 or less

2-C.	iShares S&P 500 Growth	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 9, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 22, 2025	$15,000 or less

2-D.	Vanguard Small Cap ETF (VB)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 9, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 22, 2025	$15,000 or less

2-E.	Vanguard Intrm Trs	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 9, 2025	$15,000 or less

2-F.	Vanguard Intl Dvnd	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 9, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 22, 2025	$15,000 or less

2-G.	Wt US Mc Div Fund	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

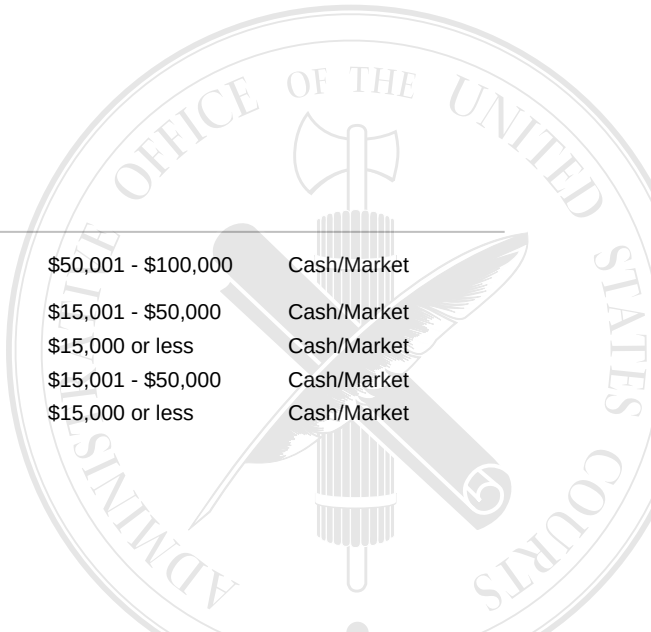
Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 9, 2025	$15,000 or less

2-H.	American Dev. World Growth Fund (DWGAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-I.	American Fundamental Investors Fund (ANCFX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
2-J.	American Growth Portfolio Fund (GWPAX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
2-K.	American High Income Trust Fund (AHITX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Oct 30, 2025 $15,000 or less				
2-L.	American Income Fund of America (AMECX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-M.	American Inter Bond Fund of America (AIBAX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Apr 9, 2025 $100,001 - $250,000				
2-N.	American Investment Company of America Fund (AIVSX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
2-O.	American New Perspective Fund A (ANWPX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-P.	American SMALLCAP World Fund (RSEBX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-Q.	American Wash Mutual Inv A	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
2-R.	Federated Prime Cash Oblgs Ws	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Apr 9, 2025 $15,001 - $50,000				
	(2). Sold (part) Oct 30, 2025 $15,000 or less				
2-S.	MFS Growth A	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
2-T.	MFS Income A	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
2-U.	MFS Intl Diversification A	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-V.	MFS Limited Maturity A	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
2-W.	MFS Mid Cap Value A	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-X.	MFS Total Return	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Apr 9, 2025 $100,001 - $250,000				
3.	**(H) Account #2**				
3-A.	American AMCAP A (AMCPX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-B.	American Balanced Fund A (ABALX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-C.	American Bond Fund of America A (ABNDX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Dec 10, 2025 $15,000 or less				
3-D.	American Capital Income Builder A (CAIBX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-E.	American High Income Trust A (AHITX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-F.	American Investment Co of America A (AIVSX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-G.	American Mutual Cl A (AMRMX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-H.	American New Perspective Fund A (ANWPX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-I.	American Smallcap World A (SMCWX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4.	**(H) Account #3**				
4-A.	Charles Schwab Bank (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
4-B.	Schwab Value Advantage Money Market Fund (SWVXX)	$1,000 or less	Dividend		

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 5, 2025 $15,001 - $50,000				
	(2). Sold Aug 15, 2025 $15,001 - $50,000				
4-C.	Invesco FTSE Rafi (PXF)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
4-D.	Invesco FTSE Rafi US (PRF)	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
4-E.	Schwab Fundamental US (FNDA)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
4-F.	Schwab International (SCHF)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
4-G.	Schwab US Large Cap ETF (SCHX)	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market
4-H.	Schwab US Tips ETF (SCHP)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
4-I.	Vanguard Mnui Bond Tax (VTEB)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
4-J.	Vanguard Small Cap ETF (VB)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
5.	**(H) Account #4**				
5-A.	Schwab Value Advantage Money Market Fund (SWVXX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 5, 2025 $15,001 - $50,000				
5-B.	Charles Schwab US Reit (SCHH)	$1,000 or less	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Dec 24, 2025 $15,001 - $50,000				
5-C.	Invesco FTSE Rafi (PXF)	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
5-D.	Invesco FTSE Rafi US (PRF)	$5,001 - $15,000	Dividend,Gain	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Dec 3, 2025 $15,001 - $50,000				
5-E.	Schwab Fundamental US (FNDA)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
5-F.	Schwab International (SCHF)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
5-G.	Schwab US Large Cap ETF (SCHX)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
5-H.	Schwab US Tips (SCHP)	$1,001 - $2,500	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Dec 24, 2025 $15,001 - $50,000				
5-I.	Vanguard Muni Bond Tax (VTEB)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Sep 30, 2025 $15,001 - $50,000				
5-J.	Vanguard Small Cap ETF (VB)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
6.	**(H) Account #5**				
6-A.	Schwab Value Advantage Money Market Fund (SWVXX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jun 23, 2025 $15,000 or less				
	(2). Sold Aug 5, 2025 $15,001 - $50,000				
7.	**(H) Account #6**				
7-A.	Edward Jones Insured Bank Deposit (Cash)	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
7-B.	Amazon (AMZN)		None	$15,001 - $50,000	Cash/Market
7-C.	Analog Devices Inc	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-D.	Nextera Energy Inc (NEE)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
7-E.	Palo Alto Networks (PANW)		None	$15,000 or less	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 9, 2025 $15,000 or less				
7-F.	Pfizer Inc	$1,000 or less	Dividend	$15,000 or less	Cash/Market
8.	**(H) Account #7**				

Additional Explanation: This is a trust which was neither established nor funded by my household or me, and we have no control over the assets or income of the trust. My household's beneficiary interest in the assets of the trust is 5.5% of the value.

8-A.	Rental property #1, South Orleans, Massachusetts	$15,001 - $50,000	Rent	$5,000,001 - $25,000,000	Estimated
8-B.	Federated Hermes Govt Obl (GOFXX)	$5,001 - $15,000	Interest	$100,001 - $250,000	Cash/Market
8-C.	U.S. Treasury Bills		None		
8-D.	U.S. Treasury Notes	$15,001 - $50,000	Interest	$250,001 - $500,000	Cash/Market
8-E.	U.S. Treasury Bonds	$5,001 - $15,000	Interest	$100,001 - $250,000	Cash/Market
8-F.	Federal Farm Credit Bank Bond 2.84%	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market
8-G.	Federal Farm Credit Bank Bond 4.75%	$5,001 - $15,000	Interest	$100,001 - $250,000	Cash/Market
8-H.	Federal Farm Credit Bank Bond 4%	$5,001 - $15,000	Interest	$100,001 - $250,000	Cash/Market
8-I.	Federal Farm Credit Bank Bond 4.5%		None	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jul 18, 2025 $100,001 - $250,000				
8-J.	Nationwide Amundi Strategic Income	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Oct 15, 2025 $100,001 - $250,000				
8-K.	Northern Tax Advantaged Ultra Short Fixed Income Fund (NTAUX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
8-L.	Northern Ultra Short Fixed Income Fund (NUSFX)	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) May 20, 2025 $100,001 - $250,000				
	(2). Sold (part) Jul 16, 2025 $100,001 - $250,000				
8-M.	Amazon.Com Inc (AMZN)	$2,501 - $5,000	Gain	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-N.	Home Depot Inc (HD)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-O.	OReilly Automotive (ORLY)		None	$15,001 - $50,000	Cash/Market
8-P.	TJX Cos Inc (TJX)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-Q.	Coca Cola (KO)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-R.	Nestle SA (NSRGY)	$15,001 - $50,000	Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 10, 2025 $15,001 - $50,000				
8-S.	Pepsico Inc. (PEP)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
8-T.	Procter & Gamble Co (PG)	$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) Jul 16, 2025 $15,000 or less				
8-U.	WalMart Inc. (WMT)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-V.	Bank of America (BAC)	$2,501 - $5,000	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-W.	Intercontinental Exchange Inc. (ICE)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-X.	JP Morgan Chase & Co. (JPM)	$2,501 - $5,000	Dividend,Gain	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-Y.	Progressive Corp (PGR)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
8-Z.	Prologis Inc REIT (PLD)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-AA.	Visa (V)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-AB.	Abbott Labs (ABT)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-AC.	Becton Dickinson (BDX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-AD.	Johnson & Johnson (JNJ)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
8-AE.	Eli Lilly & Co (LLY)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Mar 10, 2025 $15,001 - $50,000				
8-AF.	Merck & Co. Inc. (MRK)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-AG.	UnitedHealth Group Inc (UNH)	$2,501 - $5,000	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 28, 2025 $15,001 - $50,000				
8-AH.	Zoetis Inc. (ZTS)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-AI.	Eaton Corp PLC (ETN)	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-AJ.	Emerson Electric Co (EMR)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Oct 29, 2025 $50,001 - $100,000				
8-AK.	Honeywell International Inc (HON)	$15,001 - $50,000	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
	(2). Sold Oct 29, 2025 $15,001 - $50,000				
8-AL.	Union Pac Corp. (UNP)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-AM.	Xylem Inc (XYL)	$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). Sold (part) Jul 16, 2025 $15,000 or less				
8-AN.	Adobe Sys Inc. (ADBE)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Apr 16, 2025 $15,001 - $50,000				
8-AO.	Apple Inc. (AAPL)	$2,501 - $5,000	Dividend,Gain	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-AP.	Arista Networks Inc (ANET)	$1,000 or less	Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-AQ.	Broadcom Inc. (AVGO)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
8-AR.	CSCO, CISCO SYSTEMS, INC.	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jul 7, 2025 $15,001 - $50,000				
8-AS.	Intl. Business Machines Corp. (IBM)	$2,501 - $5,000	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-AT.	Microsoft Corp. (MSFT)	$5,001 - $15,000	Dividend,Gain	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-AU.	NVIDIA Corp (NVDA)	$15,001 - $50,000	Dividend,Gain	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 28, 2025 $15,000 or less				
	(2). Sold (part) Jul 16, 2025 $15,000 or less				
8-AV.	Oracle Corporation (ORCL)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Oct 22, 2025 $15,001 - $50,000				
	(2). Sold Dec 11, 2025 $15,001 - $50,000				
8-AW.	Palo Alto Networks (PANW)		None	$15,001 - $50,000	Cash/Market
8-AX.	Salesforce, Inc. (CRM)	$15,001 - $50,000	Dividend,Gain		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
	(2). Sold Oct 22, 2025 $15,000 or less				
8-AY.	ServiceNow Inc (NOW)	$1,000 or less	Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) May 28, 2025 $15,001 - $50,000				
	(2). Sold (part) Jul 16, 2025 $15,001 - $50,000				
8-AZ.	Ecolab Inc (ECL)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-BA.	Linde Plc (LIN)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-BB.	Rio Tinto PLC Spons ADR (RIO)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
8-BC.	Alphabet Inc CL A (GOOGL)	$2,501 - $5,000	Dividend,Gain	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 16, 2025 $15,000 or less				
8-BD.	Verizon Communications (VZ)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
8-BE.	NextEra Energy Inc. (NEE)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
8-BF.	iShares Biotech ETF (IBB)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-BG.	iShares Core S&P Mid-Cap ETF (IJH)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jul 16, 2025	$15,000 or less

8-BH.	iShares Gold Trust (IAU)	$15,001 - $50,000	Gain	$250,001 - $500,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 16, 2025	$15,001 - $50,000

8-BI.	SS Energy Select Sector (XLE)	$5,001 - $15,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jul 16, 2025	$15,000 or less

8-BJ.	Vanguard Dividend Apprec ETF (VIG)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jul 16, 2025	$15,000 or less

8-BK.	iShares Core Intl Stock ETF (IXUS)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$15,001 - $50,000

8-BL.	SPDR Portfolio Emerging Mkts ETF (SPEM)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jul 16, 2025	$15,000 or less

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

Additional Explanation: This is a trust of which an individual with assets subject to this report is a beneficiary and trustee. That individual's beneficiary interest is 20% of the value.

9-A.	Rental property #2, Cotuit, Massachusetts		None	$5,000,001 - $25,000,000	Estimated
9-B.	Coca Cola Co (KO)	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
9-C.	Enbridge Inc (ENB)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
9-D.	International Business Machines (IBM)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
9-E.	Pfizer (PFE)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
9-F.	Procter & Gamble Co (PG)	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
9-G.	United Parcel Services Inc Cl B	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
9-H.	Verizon Communications (VZ)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
9-I.	Vanguard High Yield	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

10. **(H) Account #9**

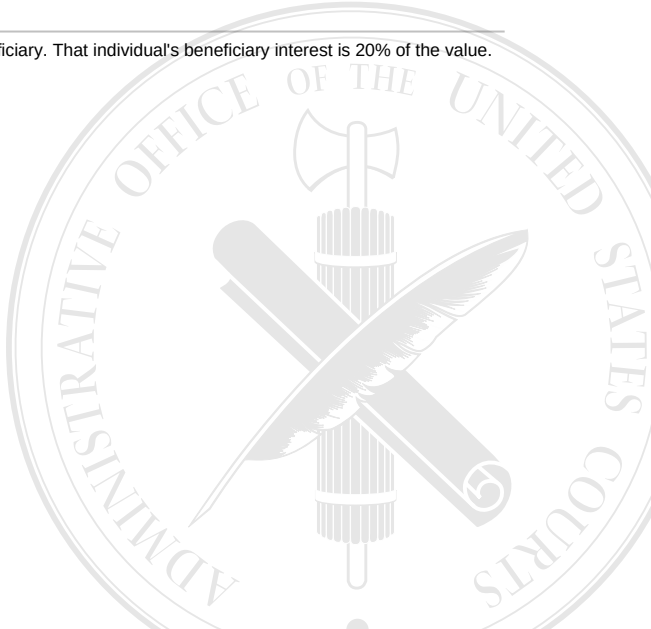
Additional Explanation: This is a trust of which an individual with assets subject to this report is a beneficiary. That individual's beneficiary interest is 20% of the value.

10-A.	U.S. Treasury Bills **Additional Explanation**: Redeemed	$1,001 - $2,500	Interest		
10-B.	Bank of China NYC CD (cash)	$1,001 - $2,500	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Opened	Feb 27, 2025	$50,001 - $100,000
(2).	Closed	May 27, 2025	$50,001 - $100,000

10-C.	Mizrahi Tefahot Bk Ltd Los CD (cash)	$1,000 or less	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Opened	Mar 10, 2025	$50,001 - $100,000
(2).	Closed	Jun 16, 2025	$50,001 - $100,000



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
10-D.	Procter & Gamble Co (PG)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
10-E.	Truist Finl Corp (TFC)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Dec 19, 2025	$15,000 or less

10-F.	Hartford Multifctr Dev Mkt ETF (RODM)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
10-G.	iShares Core Dividend Growth ETF (DGRO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
10-H.	iShares Russell Mid Cap ETF (IWR)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
10-I.	Vanguard FTSE Emerging Markets ETF (VWO)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-J.	Vanguard Growth ETF (VUG)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Dec 19, 2025	$15,000 or less

10-K.	Vanguard S&P 500 (VOO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
10-L.	Federated Prime Cash Oblgs Ws	$1,001 - $2,500	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 4, 2025	$15,001 - $50,000
(2).	Sold (part)	Apr 23, 2025	$15,001 - $50,000
(3).	Sold (part)	May 21, 2025	$15,000 or less
(4).	Sold	Dec 17, 2025	$15,001 - $50,000

11. **(H) Account #10**

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

11-A.	American Century Aggressive Portfolio		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	May 5, 2025	$15,001 - $50,000

11-B.	American Century Moderate Portfolio		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	May 5, 2025	$15,001 - $50,000

11-C.	American Century Moderately Conservative Portfolio		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	May 5, 2025	$15,001 - $50,000

11-D.	American Century Money Market Portfolio		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 5, 2025	$50,001 - $100,000
(2).	Sold (part)	Aug 4, 2025	$15,001 - $50,000
(3).	Sold (part)	Nov 17, 2025	$15,001 - $50,000

VIII. Additional Information or Explanations

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