Annual, 2024

Financial Disclosure Report (AO Form 10)

Filer's Information
Wiegand, Christy Criswell
U.S. District Court - Pennsylvania 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/ Wiegand, Christy Criswell [electronically signed on Oct 1, 2025 9:06pm by Wiegand, Christy Criswell in JEFS]
/s/ Wiegand, Christy Criswell [electronically signed on Aug 3, 2025 9:25am by Wiegand, Christy Criswell in JEFS]

I. Positions

ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
Princeton University Rowing Association	Other: Other: Rowing	Board Member
Investment Trust #1 (see Parts VII and VIII)	Trust	Trustee
CCW 2021, LLC (see Part VIII)	Limited Liability Company	Manager
Pittsburgh Cultural Trust (see Part VIII)	Non-Profit	Member, Board Of Trustees

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
Babst, Calland, Clements and Zomnir, P.C., practice of law income			$0.00	
University of Pittsburgh School of Law, adjunct teaching income			$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

CREDITOR NAME	TYPE OF LIABILITY	VALUE
True Green Capital Fund IV, L.P. Capital Commitment	Other: True Green Capital Fund IV, L.P. Capital Commitment	$50,001 - $100,000
UBS Line of credit	Other: Credit/Margin	$15,001 - $50,000
Merrill Lynch Line of credit	Other: Credit/Margin None	None

VII. Investments and Trusts

DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
(H) IRA #1 at Merrill Lynch (H)				
- Bank of America - Cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Buy	Oct 29, 2024	$15,000 or less		
- Vanguard 500 Index	$1,000 or less	Dividend	$15,000 or less	Cash/Market
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Buy	Oct 29, 2024	$15,000 or less		
(H) Investment Account #3 at Merrill Lynch (H)				
- Vanguard FTSE Developed	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- Vanguard Small Cap	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Buy	Aug 26, 2024	$15,001 - $50,000		
- Vanguard FTSE Emerging	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Ishares Preferred	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- Procter & Gamble	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- New Fortress Energy Inc	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Microsoft	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- JP Morgan Chase	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Cisco Systems	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Goldman Sachs BDC	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Buy	May 2, 2024	$15,001 - $50,000		
- Meta Platforms	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- Bank of America Corp	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Apple Inc	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- American Wtr Wks	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Amazon Com Inc	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- Adobe Inc	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Bank of America-Cash	$1,001 - $2,500	Interest	$15,000 or less	Cash/Market
- Citigroup Inc	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Comcast Corp	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- CVS Health	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
- Laboratory CP AMER Hldgs	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Pfizer Inc	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- United Healthcare Group	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
- Ishares S&P Global Clean	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- SPDR SP Biotech	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Vanguard Dividend Apprec	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
- Abbott Labs	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
(H) Investment Account #9 at Merrill Lynch (H)				
- GQG Partners Emerging	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Buy	Jun 4, 2024	$15,001 - $50,000		
- Macquarie Small Cap Core (Formerly Delaware Small Cap Core)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- JP Morgan Large Cap	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
- Artisan Small Cap Fund	$1,000 or less	Dividend		
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Sold	Aug 26, 2024	$15,001 - $50,000		
- Bank of America - Cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
- American Funds INTL	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
- Lazard Global Lstd	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
- Virtus SGA Emerging	$1,000 or less	Dividend		
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Sold	Jun 4, 2024	$15,001 - $50,000		
- Cohen & Steers	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
(H) Municipal Bond Account #1 at Merrill Lynch (H)				
- Blackrock Strategic Income Opprtnts PTF Inst	$2,501 - $5,000	Dividend		
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Sold	Oct 30, 2024	$100,001 - $250,000		
Buy (add'l)	Feb 1, 2024	$15,000 or less		
- Athens-Clarke Cnty GA Uni Govt Dev Auth Rev Jun16 4%	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Hillsborough Co Fl IDA Sep24 5% Nov15 2034	$1,000 or less	Interest	$15,000 or less	Cash/Market
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Buy	Nov 29, 2024	$15,000 or less		
- U.S. Treasury Bill Zero %	$1,000 or less	Gain		
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Sold	Nov 21, 2024	$50,001 - $100,000		
Buy	Nov 19, 2024	$50,001 - $100,000		
- Grand River Dam Auth	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Buy	Nov 20, 2024	$15,001 - $50,000		
- Minnesota St Var Purpose	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Buy	Jun 12, 2024	$15,001 - $50,000		
- Clark Cnty Nev Hwy Impt	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
Buy	Jun 12, 2024	$15,001 - $50,000		
- Fort Worth Tex Indpt Sch	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market



DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy	Feb 28, 2024	$15,001 - $50,000		
- Michigan St Univ Revs	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy	Nov 27, 2024	$50,001 - $100,000		
- Austin Tex Elec Util	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy	Dec 19, 2024	$15,001 - $50,000		
- Central VY Wtr	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy	Dec 4, 2024	$15,001 - $50,000		
- Utica Mich Cmnty Sch	$1,000 or less	Interest	$15,000 or less	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy	Nov 20, 2024	$15,000 or less		
- Bank of America-Cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
- Maryland St Loc Facs	$1,001 - $2,500	Interest	$15,000 or less	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Sold (part)	Nov 13, 2024	$15,001 - $50,000		
- Wisconsin St Clean Wtr	$1,000 or less	Interest		
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Redeemed	Jun 3, 2024	$15,001 - $50,000		
- South Carolina St Go St	$1,000 or less	Interest		
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Redeemed	Aug 1, 2024	$15,001 - $50,000		
- Delaware Transn Auth	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy	Dec 5, 2024	$50,001 - $100,000		
- Kansas St Dept Transn	$1,000 or less	Interest		
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Sold	Jan 29, 2024	$15,001 - $50,000		
- Conroe Tex Indpt Sch	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- New York St Urban Dev	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- West Va Commr of Hwys	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Washington St Var Purp	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Mississippi Dev Bk Spl	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Tampa Fla Wtr	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Omaha Pub Pwr Dist Neb	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Connecticut St GO Bond	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Yamhill Co OR SD bond	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Regional Transn Dist bond	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Des Moines IA Stormwater bond	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Indiana Muni Power	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
- Maryland St Loc Facs	$1,001 - $2,500	Interest	$15,000 or less	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Sold (part)	Nov 13, 2024	$15,001 - $50,000		
- Virginia Comwlth Transn	$1,001 - $2,500	Interest		
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Sold	Nov 13, 2024	$15,001 - $50,000		
- South Dakota Conservancy	$1,001 - $2,500	Interest		

DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Sold	Nov 13, 2024	$15,001 - $50,000		
- Louisville-Jeff KY Met	$1,001 - $2,500	Interest		
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Sold	Nov 13, 2024	$15,001 - $50,000		
(H) Investment Account #4 at Merrill Lynch (H)				
- American Funds Intl Vantage Fund Class F-2	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
- Macquarie Small Cap Core (Formerly Delaware Small Cap Core)	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
- JP Morgan Large Cap	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
- Cohen & Steers Realty	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
- Bank of America-Cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
- Eventide Healthcare	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- Lazard Glbl LSTD	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
- AQR Delphi Long Short	$15,001 - $50,000	Dividend,Interest	$100,001 - $250,000	Cash/Market
- Blackstone Private Credit	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market
- Hawk Ridge Partners LP	$2,501 - $5,000	Int./Div.	$100,001 - $250,000	Cash/Market
(H) Investment Account #1 at Merrill Lynch (H)				
- Vanguard Dividend Appreciation EFT	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
- Vanguard FTSE Developed	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- Vanguard FTSE Emerging	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Vanguard Small Cap	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy	Dec 6, 2024	$50,001 - $100,000		
- Global X Funds SHS	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy	Dec 6, 2024	$15,001 - $50,000		
-Pfizer Inc	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- Meta Platforms	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- CVS Health Corp	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
- Bank of America Corp	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
- Morgan Stanley- Preferred Stock	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- Alibaba Group Holding LT	$1,001 - $2,500	Dividend		
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Sold	Dec 6, 2024	$15,001 - $50,000		
- Amgen Inc Com	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
- Apple Inc	$1,001 - $2,500	Dividend	$250,001 - $500,000	Cash/Market
- Blackrock Inc	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
- Cisco Systems Inc	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
- Citigroup Inc Com	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
- Colgate Palmolive	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
- Comcast Corp New	$1,001 - $2,500	Dividend		
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Sold	Dec 6, 2024	$15,001 - $50,000		
- Bank of America-Cash	$5,001 - $15,000	Dividend,Interest	$250,001 - $500,000	Cash/Market
- Disney (Walt) Co Com	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- Abbott Labs	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
- Energy Transfer LP	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- Enterprise Ptr LP	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
- HCA Healthcare Inc	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
- JPMorgan Chase & Co	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
- Kimberly Clark	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
- Laboratory CP Amer Hldgs	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
- Adobe Inc	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- Microsoft Corp	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- MPLX, LP	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
- New Fortress Energy Inc	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Nextera Energy Inc SHS	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
- Nextera Energy Partners	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
	Sold	Dec 6, 2024	$15,001 - $50,000

- Procter & Gamble Co	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
- Thermo Fisher Scientific	$1,000 or less	Dividend	$250,001 - $500,000	Cash/Market
- Ishares Preferred	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
- Ishares S&P Global Clean L	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
- SPDR Gold Trust	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- Amazon Com Inc	$1,000 or less	Dividend	$250,001 - $500,000	Cash/Market
- American Wtr Wks	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

(H) Investment Trust Account #1 at Merrill Lynch (H)

- ML Bank Deposit Program	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Vanguard Dividend Appreciation ETF	$5,001 - $15,000	Dividend	$500,001 - $1,000,000	Cash/Market
- Vanguard Small Cap	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
	Buy	Feb 15, 2024	$250,001 - $500,000

- Thermo Fisher Scientific	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Microsoft Corp	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- Meta Platforms	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- Apple Inc	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- Amazon Com Inc	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- BLF Fed Fund Cash Reserve	$100,001 - $1,000,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
- Alphabet Inc	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- Blackstone Inc	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Conocophillips	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
- Danaher Corp	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- IQVIA Hldgs	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Nike Inc	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Pepsico Inc	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Schwab Charles Corp	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Texas Instruments	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- United Health Group	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Veralto Corp	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
	Sold	Feb 15, 2024	$15,000 or less

- Visa Inc	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- Global X Funds SHS	$2,501 - $5,000	Dividend	$500,001 - $1,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
	Buy (add'l)	Feb 15, 2024	$100,001 - $250,000

- IShares S&P Global Clean	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
- IShares Preferred	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market

(H) Investment Trust Account #5 at Merrill Lynch (H)

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
- American Funds Intl Vantage Fund Class F-2	$5,001 - $15,000	Dividend	$500,001 - $1,000,000	Cash/Market
- Macquarie Small Cap Core (Formerly Delaware Small Cap Core)	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
- GQG Partners Emerging	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	Buy	Feb 20, 2024	$250,001 - $500,000	
- Cohen & Steers Realty	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
- Bank of America - Cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
- Eventide HealthCare & Life Sciences	$1,000 or less	Dividend	$250,001 - $500,000	Cash/Market
- Lazard Glbl Lstd	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
- AQR Delphi Long Short (PTR)	$15,001 - $50,000	Dividend,Interest	$250,001 - $500,000	Cash/Market
- Blackstone Private Credit Fund Class I	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market
- Hawk Ridge Partners (PTR)	$15,001 - $50,000	Dividend,Interest	$250,001 - $500,000	Cash/Market
PNC Bank Checking Accounts - Cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
PNC Bank Savings Accounts - Cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
(H) 529 Account #1 Pennsylvania (H)				
- Pennsylvania Target Enrollment 2026/2027 Portfolio		None	$15,001 - $50,000	Cash/Market
(H) 529 Account #2 Pennsylvania (H)				
- Pennsylvania Target Enrollment 2026/2027 Portfolio		None	$15,001 - $50,000	Cash/Market
(H) 401(k) #1 at SchneiderDowns (H)				
- BlackRock Equity Index Fund CL I		None	$100,001 - $250,000	Cash/Market
- BlackRock MSCI ACWI ex-U.S. Index		None	$50,001 - $100,000	Cash/Market
- BlackRock U.S. Debt Index Fd		None	$15,001 - $50,000	Cash/Market
- BlackRock Russell 2000 Index Fund		None	$15,001 - $50,000	Cash/Market
- Vanguard Real Estate Index - Admiral Shares		None	$15,001 - $50,000	Cash/Market
- BlackRock Mid Cap Equity Index FundT		None	$15,001 - $50,000	Cash/Market
- Reliance MetLife Series 25053 Cl		None	$15,001 - $50,000	Cash/Market
(H) Investment Account #1 at Vanguard (H)				
- Vanguard Dividend Appreciation Index - Admiral Shares	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Vanguard Wellington - Admiral Shares	$15,001 - $50,000	Dividend,Gain	$100,001 - $250,000	Cash/Market
- Vanguard Total Stock Market Index - Admiral	$1,000 or less	Dividend	$15,000 or less	Cash/Market
(H) Rollover IRA #1 at Vanguard (H)				
- Vanguard Cash Reserves Federal Money Market Fund - Admiral CL	$1,000 or less	Dividend	$15,000 or less	Cash/Market
(H) Rollover IRA #2 at Vanguard (H)				
- Vanguard Federal Money Mkt Fund - Investor CL	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Vanguard Total World Stock Index - Admiral CL	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
(H) Roth IRA #1 at Vanguard (H)				
- Vanguard Total World Stock Index - Admiral CL	$15,001 - $50,000	Dividend	$500,001 - $1,000,000	Cash/Market



DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
- Vanguard Divided Appreciation Index - Admiral CL	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- Vanguard Federal Money Market Fund - Investor CL	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- Vanguard Wellington Fund - Admiral CL	$5,001 - $15,000	Dividend,Gain	$50,001 - $100,000	Cash/Market
(H) Investment Account #1 at UBS (H)				
Premier BK OH US Rate 5.00% mat 03/19/24 fixed rate CD	$1,000 or less	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
	Matured	Mar 19, 2024	$15,000 or less

- Goldman Sachs Bank NY US rate 5.35% mat 03/05/24 fixed rate CD	$2,501 - $5,000	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
	Matured	Mar 5, 2024	$100,001 - $250,000

- Chevron common stock	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- iShares Russell 2000 ETF	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market
- iShares Core S&P Midcap ETF	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
- iShares Russell 1000 Value ETF	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
	Sold	Jul 2, 2024	$50,001 - $100,000

- iShares Dow Jones U.S. ETF	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
- iShares Global Tech ETF	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
	Sold (part)	Sep 9, 2024	$15,001 - $50,000
	Sold (part)	Apr 19, 2024	$15,001 - $50,000
	Sold (part)	Mar 19, 2024	$15,000 or less
	Sold (part)	Mar 19, 2024	$15,001 - $50,000

- Vaneck Vectors Agribusiness ETF	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- Vanguard Total World Stock ETF	$15,001 - $50,000	Dividend	$500,001 - $1,000,000	Cash/Market
- Vanguard High Dividend Yield ETF	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
- Vanguard Dividend Appreciation ETF	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
- iShares TIPS Bond ETF	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- iShares Floating Rate Bond ETF	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
- Vanguard Inter Term Bond ETF	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
- UBS Bank USA Core Savings cash	$1,001 - $2,500	Interest	$15,000 or less	Cash/Market
- UBS Bank USA Dep Acct cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
- Key Bank NA OH US rate 04.8000% MAT 02/20/2024 FIXED RATE CD	$1,000 or less	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
	Matured	Feb 20, 2024	$15,001 - $50,000

Rental Real Estate #1 Knox County, ME (50% interest)	$15,001 - $50,000	Rent	$500,001 - $1,000,000	Estimated
Folliday Inn Holdings LLC membership interest	$2,501 - $5,000	Distribution	$15,001 - $50,000	Book Value
True Green Capital Fund III, L.P. limited partnership interest	$5,001 - $15,000	Distribution	$50,001 - $100,000	Book Value
True Green Capital Fund IV, L.P. limited partnership		None	$500,001 - $1,000,000	Book Value

Additional Explanation: There were a number of capital calls for True Green Capital Fund IV, L.P., the discharge of which are shown as individual transactions using the "Buy (add'l)" description.

DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy (add'l)	Dec 30, 2024	$15,001 - $50,000		
Buy (add'l)	Dec 30, 2024	$15,001 - $50,000		
Buy (add'l)	Oct 21, 2024	$15,001 - $50,000		
Buy (add'l)	Oct 21, 2024	$15,001 - $50,000		
Buy (add'l)	Sep 6, 2024	$15,000 or less		
Buy (add'l)	Sep 6, 2024	$15,000 or less		
Buy (add'l)	Jun 6, 2024	$15,001 - $50,000		
Buy (add'l)	Jun 6, 2024	$15,001 - $50,000		
PC Exploration Limited Partnerships DEEP, ltd p'ship interests	$15,001 - $50,000	Distribution	$15,001 - $50,000	Book Value
Solvaire Technologies, L.P. ltd p'ship interest	$1,000 or less	Distribution	$15,001 - $50,000	Book Value
(H) Roth IRA #1 at Merrill Lynch (H)				
- Vanguard Dividend Appreciation EFT	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- Bank of America, NA RASP	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
- American Growth Fund of America CL A	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- American New Perspective FD CL A	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- American Washington Mut Investors Fund Inc A	$1,000 or less	Dividend	$15,000 or less	Cash/Market
-ALPS Alerian MLP ETF	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
-MFS Growth Fund	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
(H) Investment Account #8 at Merrill Lynch (H)				
- American Funds Intl Vantage Fund Class F-2	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
- GQG Partners Emerging	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy	Jun 24, 2024	$15,001 - $50,000		
- Macquarie Small Cap Core (Formerly Delaware Small Cap Core)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- Bank of America-cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
- Artisan Small Cap Fund	$1,000 or less	Dividend		
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Sold	Aug 26, 2024	$15,001 - $50,000		
- Cohen & Steers Realty	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- JP Morgan Large Cap	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- Lazard GLBL Lstd	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
- Virtus Vontobel Emerging	$1,000 or less	Dividend		
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Sold	Jun 4, 2024	$15,001 - $50,000		
(H) Investment Account #2 at Merrill Lynch (H)				
- Vanguard Dividend Appreciation ETF	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
- Vanguard Small Cap	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
Transactions **Transaction Type**	**Transaction Date**	**Transaction Value**		
Buy	Aug 26, 2024	$15,001 - $50,000		
- Vanguard FTSE Developed	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- Bank of America-cash	$1,000 or less	Interest	$15,000 or less	Cash/Market
- Abbott Labs	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
- Adobe Inc	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Amazon Com Inc	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- American Wtr Wks	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Apple Inc	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
- Bank of America Corp	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Cisco Systems	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Citigroup	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Comcast Corp CL A	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- CVS Health Corp	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
- Goldman Sachs BDC	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
	Buy	May 2, 2024	$15,001 - $50,000

- Meta Platforms	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- JP Morgan Chase	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Laboratory CP Amer Hldgs	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- Microsoft	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- New Fortress Energy Inc	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Pfizer	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Procter & Gamble	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- UnitedHealth Group Inc	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
- Ishares Preferred & Income Securities ETF	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
- Ishares S&P Global Clean	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
- SPDR S&P BioTech	$1,000 or less	Dividend	$15,000 or less	Cash/Market
- Vanguard FTSE Emerging	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

VIII. Additional Information or Explanations

ADDITIONAL INFORMATION OR EXPLANATION

The Pittsburgh Cultural Trust is a non-profit arts organization whose mission is the cultural and economic revitalization of a 14-block arts and entertainment/ residential neighborhood called the Cultural District located in downtown Pittsburgh. The assets of this organization do not inure to the benefit of the reporting person or family and so are not reported in Part VII.

No income information is provided by the fiduciary for the two (2) 529 Savings Accounts listed in Part VII. For the 401(k) at SchneiderDowns, the fiduciary does not report income transactions on any of the investments except the Vanguard Real Estate Index; also, the fiduciary does maintain a ledger of contributions by investment for the entire year but none of these represented any single purchase, sale or exchange during the reporting period that exceeds $1,000.

The account previously reported as IRA #1 at Vanguard had no assets or transactions in 2024 and hence is not included in this report. This account remains open at Vanguard, however, and may be used in the future. To the extent that this account has reportable assets or transactions in the future, it will be included in future reports.

The holdings listed in Part VII in the various Merrill Lynch accounts (including the holdings of Investment Trust #1), to the extent the context does not clearly indicate otherwise, are equity holdings.

As shown in Part VII of the report dated July 26, 2021, all of the holdings in Investment Account #5, Investment Account #6, and Investment Account #7 at Merrill Lynch were sold in 2020. Those accounts were subsequently closed. For consistency, however, the original labeling and numbering of non-trust, non-IRA investment, non-municipal bond accounts at Merrill Lynch from prior reports is retained in this report for consistency, i.e., Investment Accounts ##1, 2, 3, 4, 8 and 9 at Merrill Lynch.

The PC Exploration Limited Partnerships are oil and gas production enterprises located in Butler County, Pennsylvania; these partnerships consist of four separate oil and gas exploration and production limited partnerships for each of 2007, 2008, 2009 and 2010.

As noted in prior reports, Investment Trust Accounts ##2, 3, and 4 at Merrill Lynch have been closed, and Investment Trust Account #5 is used in their stead following the correction of an administrative error in early 2022. As with the note set forth above regarding Investment Accounts ##1, 2, 3, 4, 8 and 9 at Merrill Lynch, the labeling and numbering of the Investment Trust Accounts will be retained in future reports (i.e., Investment Trust Accounts ##1 and 5 at Merrill Lynch will be preserved and used in future reports to designate the surviving accounts but Investment Trust Accounts ## 2, 3, and 4 will no longer be used).

CCW 2021, LLC is the entity which holds the assets of Investment Trust Account # 1. The sole member of this LLC is Investment Trust Account # 1.

Produced by Administrative Office of the United States Courts