AO 10
Rev. 1/2022

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 101-111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Wood, Kimba M.	U.S. District Court, SDNY	10/06/2025
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
U.S. District Judge (Senior)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	1/1/2024 **to** 12/31/2024
7. Chambers or Office Address		
500 Pearl Street New York, NY 10007		

IMPORTANT NOTES: ***The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.***

I. POSITIONS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Trustee	The Frank E. Richardson 2011 Insurance Trust Agreement (See Note 4 in Section VIII)
2.	Co-Trustee	[redacted] Lifetime Access Trust (SLAT) (SEE LINE 142 IN SECTION VII)
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements.)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE
1.	2024*	Morgan Stanley Pension Benefit
2.		
3.		
4.		
5.	*(various)	

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

V. GIFTS. *(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☐ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.	Citibank	Line of Credit	P1
2.	American Express	Credit Card	K
3.	Citibank	Credit Card	J
4.			
5.			

Name of Person Reporting	Date of Report
Wood, Kimba M.	10/06/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1. FIRST AM GOVT OB FUND CLASS Z MMF (SEE NOTE 21 IN SECT VIII)									
2. EXXON CORP COMMON STOCK	C	Dividend	L	T					
3. INVESTMENT ACCOUNT #1 - AT BROWN ADVISORY/US BANK (IA) (H)									
4. ---FIRST AM GOVT OB FUND CL Z MMF FGZXX	C	Dividend	L	T	Buy (add'l)	01/03/24	J		
5.					Sold (part)	01/23/24	L		
6.					Buy (add'l)	02/02/24	J		
7.					Buy (add'l)	03/04/24	J		
8.					Buy (add'l)	03/20/24	J		
9.					Buy (add'l)	04/02/24	J		
10.					Sold (part)	04/30/24	K		
11.					Buy (add'l)	05/02/24	J		
12.					Buy (add'l)	06/04/24	J		
13.					Buy (add'l)	06/25/24	J		
14.					Buy (add'l)	07/02/24	J		
15.					Buy (add'l)	08/02/24	J		
16.					Buy (add'l)	08/09/24	K		
17.					Buy (add'l)	09/04/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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Wood, Kimba M.	10/06/2025

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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
18.					Buy (add'l)	09/16/24	J		
19.					Buy (add'l)	10/02/24	J		
20.					Sold (part)	10/04/24	K		
21.					Buy (add'l)	11/04/24	J		
22.					Buy (add'l)	12/03/24	J		
23.					Buy (add'l)	12/31/24	J		
24.	---ARTISAN INTERNATIONAL VALUE ADVISOR	D	Dividend	M	T	Buy (add'l)	11/27/24	J		
25.	---BROWN ADV BEUTI GDMAN LRGE CAP FUND		None			Sold	01/22/24	M	F	
26.	---BROWN ADV EMG MKTS INS	A	Dividend	K	T	Sold (part)	10/03/24	K	B	
27.	---BROWN ADVISORY FLEXIBLE EQUITY FUND	D	Dividend	M	T	Buy	01/22/24	M		
28.						Buy (add'l)	04/29/24	J		
29.						Buy (add'l)	12/16/24	J		
30.	---BROWN ADV GLOBAL LEADERS	B	Dividend	M	T	Buy (add'l)	01/22/24	K		
31.						Buy (add'l)	04/29/24	J		
32.	---BROWN ADV SMALL CAP FUNDAMENTAL VALUE	E	Dividend	M	T	Sold (part)	10/03/24	K	D	
33.						Buy (add'l)	12/16/24	K		
34.	---BROWN ADV SMALL CAP GROWTH INV	D	Dividend	M	T	Buy (add'l)	01/22/24	K		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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35.					Sold (part)	10/03/24	J	A	
36.					Buy (add'l)	12/16/24	J		
37. ---BROWN ADV SUSTAINABLE GROWTH FUND	E	Dividend	N	T	Buy (add'l)	12/16/24	K		
38. ---BROWN ADV SUSTAIN VAL FUND INSTL	D	Dividend	M	T	Buy (add'l)	12/17/24	J		
39. ---BROWN ADV TAX EXEMPT BND INS	E	Dividend	N	T	Buy (add'l)	04/29/24	J		
40.					Buy (add'l)	10/03/24	K		
41. ---BROWN ADVISORY - WMC JAPAN EQUITY FUND		None	L	T	Buy	10/03/24	L		
42. INVESTMENT ACOUNT #2 AT BROWN ADVISORY/USBANK - IRA #1 (H)									
43. ---FIRST AMER GOVT OBLIGATIONS MMF FGZXX	D	Dividend	M	T	Buy (add'l)	01/03/24	J		
44.					Sold (part)	01/23/24	J		
45.					Buy (add'l)	02/02/24	J		
46.					Buy (add'l)	03/04/24	J		
47.					Sold (part)	04/30/24	K		
48.					Buy (add'l)	05/01/24	J		
49.					Buy (add'l)	05/02/24	J		
50.					Buy (add'l)	06/04/24	J		
51.					Buy (add'l)	07/02/24	J		

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52.					Buy (add'l)	08/02/24	J		
53.					Buy (add'l)	08/05/24	J		
54.					Buy (add'l)	09/04/24	J		
55.					Buy (add'l)	09/16/24	J		
56.					Buy (add'l)	10/02/24	J		
57.					Buy (add'l)	10/04/24	J		
58.					Buy (add'l)	11/04/24	J		
59.					Buy (add'l)	11/06/24	J		
60.					Buy (add'l)	12/03/24	J		
61.					Buy (add'l)	12/05/24	J		
62.					Buy (add'l)	12/31/24	K		
63.	---ARTISAN HIGH INCOME FUND	D	Dividend	M	T	Buy (add'l)	04/29/24	J	
64.	---ARTISAN INTERNATIONAL VALUE ADVISOR	E	Dividend	N	T	Sold (part)	10/03/24	J	B
65.						Buy (add'l)	11/27/24	J	
66.	---BROWN ADV BEUTI GDMAN LRG CAP INST	E	Dividend	O	T	Sold (part)	01/22/24	J	C
67.						Buy (add'l)	12/16/24	K	
68.	---BROWN ADV EMG MKTS INS	B	Dividend	M	T	Sold (part)	10/03/24	L	E

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69. ---BROWN ADV FLEXIBLE EQUITY INST	E	Dividend	O	T	Buy (add'l)	01/22/24	J		
70.					Buy (add'l)	04/29/24	J		
71.					Buy (add'l)	10/03/24	K		
72.					Buy (add'l)	12/16/24	K		
73. ---BROWN ADV GLOBAL LEADERS INST	B	Dividend	N	T	Buy (add'l)	04/29/24	J		
74.					Buy (add'l)	10/03/24	J		
75. ---BROWN ADV SM CAP FUNDAMENTAL VALUE	F	Dividend	N	T	Buy (add'l)	01/22/24	K		
76.					Buy (add'l)	12/16/24	L		
77. ---BROWN ADV SMALL CAP GROWTH INV	E	Dividend	N	T	Buy (add'l)	10/03/24	J		
78.					Buy (add'l)	12/16/24	K		
79. ---BROWN ADV SUSTAINABLE GROWTH	E	Dividend	O	T	Buy (add'l)	12/16/24	K		
80. ---BROWN ADV SUSTAIN BOND INST	C	Dividend			Sold (part)	01/22/24	K		
81.					Sold	04/30/24	N		
82. ---BROWN ADVISORY - WMC JAPAN EQUITY FUND		None	K	T	Buy	10/03/24	K		
83. ----VOYA INTERMEDIATE BOND FUND	D	Dividend	N	T	Buy	04/30/24	M		
84. MERRILL LYNCH BANK DEPOSIT (ML EDGE)	A	Interest	K	T					
85. FIDELITY INVESTMENT ACCOUNT (H)									

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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86. ---FIDELITY TREASURY MONEY MARKET FUND FZFXX	D	Dividend	N	T	Buy (add'l)	02/29/24	K		
87.					Sold (part)	03/25/24	J		
88.					Buy (add'l)	04/01/24	K		
89.					Buy (add'l)	04/30/24	K		
90.					Sold (part)	05/20/24	J		
91.					Buy (add'l)	05/30/24	K		
92.					Sold (part)	06/12/24	J		
93.					Buy (add'l)	06/28/24	K		
94.					Buy (add'l)	07/01/24	J		
95.					Sold (part)	07/24/24	J		
96.					Sold (part)	07/30/24	K		
97.					Buy (add'l)	07/31/24	K		
98.					Buy (add'l)	08/30/24	K		
99.					Sold (part)	09/03/24	J		
100.					Sold (part)	09/05/24	J		
101.					Buy (add'l)	09/30/24	K		
102.					Sold (part)	10/07/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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103.					Buy (add'l)	10/31/24	K		
104.					Buy (add'l)	11/29/24	K		
105.					Sold (part)	12/23/24	J		
106.					Buy (add'l)	12/31/24	K		
107.	INVESTMENT ACCOUNT #3 AT BROWN ADVISORY/USBANK (12-MAIN) (H)								
108.	---FIRST AMERICAN GOVT OBLIGATIONS FUND CLASS Z MMF FGZXX	F	Dividend	O	T	Buy (add'l)	01/03/24	K	
109.						Buy (add'l)	01/04/24	J	
110.						Sold (part)	01/30/24	L	
111.						Buy (add'l)	02/02/24	J	
112.						Buy (add'l)	02/02/24	O	
113.						Buy (add'l)	02/05/24	J	
114.						Sold (part)	02/07/24	P1	
115.						Buy (add'l)	03/04/24	J	
116.						Sold (part)	04/30/24	J	
117.						Buy (add'l)	05/23/24	O	
118.						Buy (add'l)	06/03/24	L	

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
119.					Buy (add'l)	06/04/24	J		
120.					Sold (part)	06/10/24	M		
121.					Buy (add'l)	07/02/24	J		
122.					Buy (add'l)	07/08/24	J		
123.					Sold (part)	07/30/24	J		
124.					Buy (add'l)	08/02/24	J		
125.					Buy (add'l)	09/04/24	J		
126.					Buy (add'l)	10/02/24	J		
127.					Sold (part)	10/30/24	J		
128.					Buy (add'l)	11/04/24	J		
129.					Sold (part)	12/02/24	K		
130.					Buy (add'l)	12/03/24	J		
131.	---BA GLOBAL LEADERS FUND-MOVED T0 LINE 146 (SEE NOTE 8 IN SECT VIII)								
132.	---EGERTON INVESTMNT PRTNRS (NOTE 1 IN SECT VIII)	H1	Distribution	P2	U				
133.	---BA GLOBAL HILLHOUSE CHINA VAL FND LLP (NOTE 1 IN SEC VIII)		None			Redeemed	02/01/24	O	
134.						Distributed	07/08/24	J	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
135. ---STREAM DATA CENTER FUND (SDC) (SEE NOTE 9 IN SECT VIII)		None	M	U	Buy	06/10/24	M		
136. (DEVELOPMENT AND OPERATION OF TURNKEY DATA CENTERS)					Buy (add'l)	12/02/24	K		
137.					Sold (part)	12/02/24	J		
138. ------SDC CHI III LLC (X)		None	M	W					
139. ------SDC DFWC, LP (X)		None	K	W					
140. ------SDC PHX II, LLC (X)		None	J	W					
141. ------SDC SA III, LLC (X)		None	J	W					
142. SLAT HELD AT BROWN ADVISORY/US BANK (SEE NOTE 8 IN SECT VIII)(H)									
143. ---FIRST AMERICAN GOVERNMENT OBLIG FUND CL Z MONEY MARKET FUND FGZXX	A	Dividend	K	T	Open	06/24/24	J		
144.					Buy (add'l)	10/15/24	J		
145.					Buy (add'l)	12/30/24	K		
146. ---BA GLOBAL LEADERS MUTUAL FUND - BAFLX (SEE NOTE 8 IN SECT VIII)	E	Dividend	P1	T	Sold (part)	06/24/24	J	A	
147. INVESTMENT ACCOUNT #4 AT BROWN ADVISORY/USBANK (MUNI) (H)									
148. ---FIRST AMERICAN GOVT OBLIG CLASS Z MONEY MARKET FUND - FGZXX	E	Dividend	N	T	Buy (add'l)	01/02/24	K		
149.					Buy (add'l)	01/03/24	J		
150.					Buy (add'l)	01/08/24	N		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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151.					Sold (part)	01/11/24	N		
152.					Buy (add'l)	01/16/24	K		
153.					Buy (add'l)	01/23/24	M		
154.					Buy (add'l)	01/26/24	J		
155.					Sold (part)	01/30/24	M		
156.					Buy (add'l)	02/01/24	J		
157.					Buy (add'l)	02/01/24	J		
158.					Buy (add'l)	02/02/24	J		
159.					Sold (part)	02/14/24	N		
160.					Buy (add'l)	02/15/24	J		
161.					Buy (add'l)	03/01/24	K		
162.					Buy (add'l)	03/04/24	J		
163.					Buy (add'l)	03/15/24	K		
164.					Buy (add'l)	04/01/24	J		
165.					Buy (add'l)	04/05/24	J		
166.					Sold (part)	04/30/24	L		
167.					Buy (add'l)	05/01/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
168.					Buy (add'l)	05/10/24	J		
169.					Buy (add'l)	05/15/24	K		
170.					Buy (add'l)	05/21/24	O		
171.					Buy (add'l)	05/21/24	J		
172.					Sold (part)	05/23/24	N		
173.					Buy (add'l)	06/03/24	L		
174.					Buy (add'l)	06/04/24	J		
175.					Buy (add'l)	06/14/24	J		
176.					Buy (add'l)	06/17/24	M		
177.					Sold (part)	06/18/24	N		
178.					Buy (add'l)	06/21/24	N		
179.					Sold (part)	06/27/24	N		
180.					Buy (add'l)	07/01/24	O		
181.					Buy (add'l)	07/02/24	J		
182.					Sold (part)	07/03/24	N		
183.					Buy (add'l)	07/15/24	K		
184.					Buy (add'l)	07/19/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
185.					Sold (part)	07/30/24	M		
186.					Buy (add'l)	07/31/24	M		
187.					Buy (add'l)	08/01/24	J		
188.					Buy (add'l)	08/02/24	J		
189.					Sold (part)	08/07/24	N		
190.					Buy (add'l)	08/09/24	N		
191.					Buy (add'l)	08/09/24	J		
192.					Buy (add'l)	08/13/24	N		
193.					Sold (part)	08/14/24	K		
194.					Buy (add'l)	08/15/24	J		
195.					Buy (add'l)	08/23/24	J		
196.					Buy (add'l)	09/03/24	K		
197.					Buy (add'l)	09/04/24	J		
198.					Sold (part)	09/11/24	K		
199.					Buy (add'l)	09/16/24	J		
200.					Sold (part)	09/18/24	N		
201.					Buy (add'l)	09/27/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

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202.					Buy (add'l)	10/01/24	J		
203.					Buy (add'l)	10/02/24	J		
204.					Buy (add'l)	10/04/24	O		
205.					Sold (part)	10/10/24	N		
206.					Sold (part)	10/30/24	L		
207.					Buy (add'l)	11/01/24	K		
208.					Buy (add'l)	11/04/24	J		
209.					Buy (add'l)	11/15/24	L		
210.					Buy (add'l)	12/02/24	K		
211.					Buy (add'l)	12/06/24	J		
212.					Buy (add'l)	12/16/24	K		
213.	---BUCKEYE OH TOBACCO SETTLEMENT AUTH REF SENIOR 6/1/39	D	Interest	M	T				
214.	---BUFFALO NY SEWER AUTH-GREEN BOND DUE 6/15/24	C	Interest			Matured	06/15/24	M	
215.	---DENVER CITY COUNTY CO ARPT REV AMT REF SUB SYS BONDS 12/1/36	E	Interest	N	T				
216.	---EDINBURG TX CONS INDPT SCH DIST 5% 2/15/2035	C	Interest			Sold	01/19/24	M	
217.	---FL DEV FIN CORP HEALTHCARE FACS REV BONDS (11/15/2025)	D	Interest			Sold	08/08/24	N	B

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218. ---HOKE CNTY NC LTD OBIG BONDS 6/1/39	D	Interest	N	T					
219. ---ILLINOIS ST GO REF BONDS (7/1/2024)	E	Interest			Matured	07/01/24	N		
220. ---IL STATE SALES TAX 5% (6/15/37)	E	Interest	N	T	Buy	01/18/24	N		
221. ---KY STATE PUBLIC ENERGY AUTH 5% 1/1/55		None	N	T	Buy	06/20/24	N		
222. ---LANSING MI SCH DIST UTLD BOND 5/1/37	E	Interest	N	T					
223. ---LOS ANGELES CA DEPRT ARPTS BONDS 5% 5/15/2032	D	Interest	M	T					
224. ---MA STATE DEV FIN AGY 5% 7/1/36		None	N	T	Buy	08/08/24	N		
225. ---MD ST COMMUNITY DEV ADMIN DEPT HSG&COMM DEV DUE 9/1/31	D	Interest	M	T					
226. ---MARYLAND ST HEALTH - 7/1/24 BOND	C	Interest			Matured	07/01/24	L		
227. ---MARYLAND ST HEALTH -7/1/30 BOND	C	Interest	L	T					
228. ---MET TRANSPORTATION NY - 11/15/33 BOND	D	Interest	N	T					
229. ---METROPOLITAN TRANS AUTH BY BONDS 5% 11/15/2038	B	Interest			Sold	01/08/24	N		
230. ---MET TRANSPORATION AUTH NY 5% 11/15/25	D	Interest	N	T	Buy	07/02/24	N		
231. ---MET WASHGTN DC AIRPORTS BONDS 5% 10/1/2040	D	Interest	N	T					
232. ---MIAMI DADE CNTY FL SCHOOL DIS 5% 3/15/2030	D	Interest			Sold	06/20/24	N		
233. ---MINNEAPOLIS-ST PAUL MN METRO AIRPORTS 5% 1/1/38		None	N	T	Buy	07/25/24	N		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
234. ---MOBILE AL INDL DEV BRD POLLUTION CONTROL REV BONDS 6/1/34	D	Interest	N	T					
235. ---MONROE COUNTY NY INXL DEV CORP REV BONDS 7/1/34	D	Interest			Sold	05/17/24	N	A	
236. ---NJ ECONOMIC DEV AUTH BONDS 4% 6/15/2039	D	Interest	N	T					
237. ---NJ ST TRANS AUTH 0% 12/15/25		None	N	T					
238. ---NEWPORT NEWS VA ECONOMIC DEVELOP AUTH DUE 12/1/38	D	Interest	M	T					
239. ---NEW YORK NY CITY INDL DEV AGENCY 2.5% 3/1/2037	D	Interest	N	T					
240. ---NEW YORK CITY NY MUN WATER FIN AUTH 6/15/2032	D	Interest			Sold	05/17/24	N	E	
241. ---NY NY FISCAL 2018 SUBSER 10/1/46 (FKA NEW YORK NY GO-SPA BARC-VRDN)	D	Interest	L	T	Sold (part)	10/04/24	M		
242. ---NEW YORK NY TRANSITIONAL FIN AUTHORITY DUE 2/1/31	D	Interest	N	T					
243. ---NEW YORK CITY NY TRANS FIN AUTH 5% 7/15/36	D	Interest	N	T	Buy	01/09/24	N		
244. ---NEW YORK CITY NY TRANS FIN AUTH REV SUB FUTURE TAX SECURED 11/1/42	E	Interest	N	T					
245. ---NEW YORK NY CITY TRANS AUTH BLDG AID REV BONDS 7/15/33	D	Interest	N	T					
246. ---NEW YORK NY CITY TRANS AUTH REV FUTURE TAX 2ND SUB BONDS 5/1/40	E	Interest	N	T					
247. ---NY STATE DORM AUTHORITY 5% 5/1/34		None	N	T	Buy	10/02/24	N		
248. ---NY STATE DORM AUTHORITY 5% DUE 10/1/37		None	N	T	Buy	05/17/24	N		

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3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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249. ---NY ST DORM AUTHO ST PERS INC TAX REV GEN PURP BONDS 5% (2/15/2026)	E	Interest	N	T					
250. ---NY ST DORM AUTH GEN PURP BONDS 5% 3/15/2036	D	Interest	N	T					
251. ---NEW YORK ST HSG FIN AGY REV AFFORDABLE BONDS 3.6% 11/1/62	E	Interest	N	T					
252. ---NEW YORK ST URBAN BOND DUE 3/15/27	C	Interest			Sold	07/30/24	M		
253. ---NEW YORK LIBERTY DEV CORP BONDS 3.125% 9/15/2050	D	Interest	M	T					
254. ---N TX TOLLWAY AUTH 5% 1/1/36	A	Interest			Buy	09/10/24	N		
255.					Sold	10/03/24	N	A	
256. ---PALM BEACH CNTY FL HEALTH BONDS 5% 11/15/2042	D	Interest	M	T					
257. ---PATRIOTS ENERGY GROUP FING AG SC GAS SUPPLY REV BONDS 2/1/54	E	Interest	N	T					
258. ---PHILADELPHIA PA GAS WORKS 5% 08/01/29		None	N	T	Buy	09/13/24	N		
259. ---PHILADELPHIA PA REF SER A BOND DUE 8/1/26	C	Interest	L	T	Buy (add'l)	08/13/24	K		
260. ---PORT AUTH NY NJ CONSOLIDATED BONDS 11/15/35	E	Interest	N	T					
261. ---PORT AUTH NY NJ CONSOLIDATED BDS 4% 7/15/2034	D	Interest	N	T					
262. ---SALES TAX SECURITIZATION CORP 5% 1/1/2037	D	Interest	N	T					
263. ---SALT LAKE CITY UT ARPT REV SER B 5% 7/1/2042	D	Interest	N	T					
264. ---SAN FRANCISCO CA CITY COUNTY ARPRT REV REF AMT SECD SER BNDS 5/1/38	E	Interest	N	T					

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265. ---SPRINGFIELD IL ELECTRIC DUE 3/1/26	D	Interest	M	T					
266. ---TOBACCO SECURITIZATION AUTH NORTH CA 5% 6/1/2032	D	Interest			Sold	08/08/24	N		
267. ---TOBACCO SETTLEMENT FING CORP NJ 5% 6/1/2029	D	Interest	M	T					
268. ---TRIBOROUGH BRDG TUNL AUTH NY REV BONDS 5% 11/15/37	E	Interest	N	T					
269. ---TRIBOROUGH NY BRIDGE & TUNNEL AUTH 5% 11/15/35	D	Interest	N	T	Buy	05/21/24	N		
270. ---UNIVERSITY OF TOLEDO OH DUE 6/1/36	E	Interest	N	T					
271. ---UPPER SANTA CLARA VY JT PWRS AUTH CA	D	Interest			Sold	09/10/24	N	D	
272. ---UTILITY DEBT SECURITIZATION AUTH NY RESTRUCTURING BONDS 5% 12/15/32	E	Interest	N	T					
273. ---YAKIMA & KITTITAS CNTYS WA GO DUE 12/1/29	D	Interest			Sold	08/13/24	N		
274. INVESTMENT ACCOUNT #5 AT BROWN ADVISORY/USBANK (SCG) (H)									
275. ---FIRST AMERICN GOVT OBLGTNS FUND CL Z MONEY MARKET FUND FGZXX	D	Dividend			Sold (part)	01/03/24	J		
276.					Buy (add'l)	01/04/24	J		
277.					Buy (add'l)	01/05/24	J		
278.					Sold (part)	01/08/24	J		
279.					Buy (add'l)	01/09/24	J		
280.					Buy (add'l)	01/10/24	J		

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281.					Buy (add'l)	01/17/24	J		
282.					Sold (part)	01/19/24	J		
283.					Sold (part)	01/24/24	J		
284.					Sold (part)	01/25/24	J		
285.					Sold (part)	01/26/24	J		
286.					Sold (part)	02/02/24	J		
287.					Sold (part)	02/07/24	J		
288.					Buy (add'l)	02/09/24	J		
289.					Buy (add'l)	02/12/24	J		
290.					Sold (part)	02/14/24	J		
291.					Sold (part)	02/15/24	K		
292.					Sold (part)	02/16/24	J		
293.					Sold (part)	02/20/24	J		
294.					Sold (part)	02/21/24	J		
295.					Sold (part)	02/22/24	J		
296.					Sold (part)	02/29/24	J		
297.					Sold (part)	03/01/24	J		

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298.					Buy (add'l)	03/04/24	J		
299.					Sold (part)	03/06/24	J		
300.					Sold (part)	03/07/24	J		
301.					Sold (part)	03/08/24	J		
302.					Sold (part)	03/11/24	J		
303.					Buy (add'l)	03/18/24	K		
304.					Sold (part)	03/18/24	J		
305.					Sold (part)	03/19/24	J		
306.					Sold (part)	03/20/24	J		
307.					Sold (part)	03/21/24	J		
308.					Buy (add'l)	03/22/24	J		
309.					Sold (part)	03/26/24	J		
310.					Sold (part)	03/27/24	J		
311.					Sold (part)	03/28/24	J		
312.					Sold (part)	04/01/24	K		
313.					Sold (part)	04/02/24	K		
314.					Sold (part)	04/05/24	J		

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H1 =$1,000,001 - $5,000,000
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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
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315.					Sold (part)	04/08/24	J		
316.					Sold (part)	04/09/24	J		
317.					Sold (part)	04/16/24	J		
318.					Sold (part)	04/17/24	J		
319.					Sold (part)	04/19/24	J		
320.					Buy (add'l)	04/22/24	J		
321.					Buy (add'l)	04/23/24	J		
322.					Buy (add'l)	04/29/24	J		
323.					Buy (add'l)	05/02/24	J		
324.					Buy (add'l)	05/03/24	K		
325.					Buy (add'l)	05/06/24	J		
326.					Buy (add'l)	05/07/24	J		
327.					Buy (add'l)	05/08/24	J		
328.					Buy (add'l)	05/09/24	J		
329.					Buy (add'l)	05/10/24	J		
330.					Buy (add'l)	05/13/24	J		
331.					Buy (add'l)	05/16/24	J		

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E =$15,001 - $50,000
F =$50,001 - $100,000
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H1 =$1,000,001 - $5,000,000
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J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
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332.					Buy (add'l)	05/23/24	P1		
333.					Sold (part)	05/14/24	J		
334.					Sold (part)	05/15/24	J		
335.					Sold (part)	05/17/24	J		
336.					Sold (part)	05/20/24	J		
337.					Sold (part)	05/21/24	J		
338.					Sold (part)	05/22/24	J		
339.					Sold (part)	05/23/24	P1		
340.					Closed	06/03/24	L		
341. ---COMMON STOCKS (SCG) (H)									
342. ---ACCOLADE INC		None			Sold	05/21/24	K		
343. ---AGILON HEALTH INC		None			Sold (part)	01/05/24	J		
344.					Sold (part)	01/08/24	J		
345.					Sold (part)	05/03/24	J		
346.					Sold	05/08/24	J		
347. ---ALIGNMENT HEALTHCARE INC		None			Sold (part)	01/08/24	J		
348.					Sold (part)	02/07/24	J		

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349.					Sold (part)	02/08/24	J		
350.					Sold	02/16/24	J		
351. ---ARVINAS INC		None			Sold	05/21/24	J		
352. ---ASCENDIS PHARMA		None			Buy (add'l)	02/08/24	J		
353.					Buy (add'l)	02/12/24	J		
354.					Buy (add'l)	02/13/24	J		
355.					Buy (add'l)	03/27/24	J		
356.					Buy (add'l)	03/28/24	J		
357.					Sold (part)	05/06/24	J		
358.					Sold (part)	05/07/24	J		
359.					Sold (part)	05/13/24	J		
360.					Sold	05/21/24	K	A	
361. ---ASTERA LABAS INC		None			Buy	03/20/24	J		
362.					Sold (part)	03/20/24	J	B	
363.					Sold	03/21/24	J	B	
364. ---THE AZEK CO INC		None			Sold	05/21/24	K	D	
365. ---BENTLEY SYS INC	A	Dividend			Sold (part)	02/05/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
366.					Sold (part)	02/06/24	J	A	
367.					Sold (part)	02/07/24	J	B	
368.					Sold (part)	02/08/24	J	A	
369.					Sold (part)	04/18/24	J	C	
370.					Sold (part)	04/19/24	J	B	
371.					Sold (part)	05/01/24	J	A	
372.					Sold	05/02/24	J	A	
373. ---BIO TECHNE CORP	A	Dividend			Buy (add'l)	01/23/24	J		
374.					Buy (add'l)	01/24/24	J		
375.					Buy (add'l)	02/05/24	J		
376.					Buy (add'l)	03/22/24	J		
377.					Sold	05/21/24	K	D	
378. ---BLACKLINE, INC		None			Sold (part)	03/08/24	J		
379.					Sold (part)	05/06/24	J		
380.					Sold (part)	05/08/24	J		
381.					Sold	05/21/24	K	A	
382. ---BLUEPRINT MEDICINES CORP		None			Sold	05/21/24	K	D	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
383. ---BRIGHT HORIZONS FAMILY SOLUTION, INC		None			Sold	05/21/24	M	D	
384. ---BRUKER CORPORATION	A	Dividend			Sold	05/21/24	L	E	
385. ---CACTUS, INC	A	Dividend			Sold (part)	03/07/24	J	A	
386.					Sold (part)	03/20/24	J	A	
387.					Sold	05/21/24	K	D	
388. ---CASELLA WASTE SYSTEMS INC		None			Sold	05/21/24	L	D	
389. ---CASEY'S GENERAL STORES, INC	A	Dividend			Sold (part)	03/11/24	J	A	
390.					Sold	05/21/24	L	F	
391. ---CCC INTELLIGENT SOLUTIONS HLD CO		None			Buy (add'l)	01/23/24	J		
392.					Buy (add'l)	02/08/24	J		
393.					Sold	05/21/24	L	B	
394. ---CHAMPIONX CORP	A	Dividend			Buy (add'l)	05/16/24	J		
395.					Buy (add'l)	05/17/24	J		
396.					Buy (add'l)	05/20/24	J		
397.					Sold	05/21/24	L	E	
398. ---CHOICE HOTELS INTERNATIONAL, INC	A	Dividend			Sold (part)	01/02/24	J	B	
399.					Sold	01/03/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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400. ---CHURCHILL DOWNS	A	Dividend			Sold (part)	05/01/24	J	C	
401.					Sold	05/21/24	K	D	
402. ---CLARUS CORP (SEE NOTE 25 IN SECT VIII)	A	Dividend			Sold (part)	05/21/24	J		
403. ---CLEAR SECURE INC	A	Dividend			Buy (add'l)	01/22/24	J		
404.					Buy (add'l)	05/13/24	J		
405.					Sold	05/21/24	K		
406. ---CLEARWATER ANALYTICS HOLDINGS INC		None			Sold	05/21/24	J	A	
407. ---COGENT COMMUNICATIONS GROUP, INC	A	Dividend			Buy (add'l)	03/27/24	J		
408.					Buy (add'l)	03/28/24	J		
409.					Sold	05/21/24	K		
410. ---CURTISS WRIGHT CORP	A	Dividend			Sold	05/21/24	K	E	
411. ---CYTOKINETICS, INC.		None			Buy	02/08/24	J		
412.					Buy (add'l)	02/12/24	J		
413.					Buy (add'l)	02/13/24	J		
414.					Buy (add'l)	03/07/24	J		
415.					Buy (add'l)	03/20/24	J		
416.					Buy (add'l)	03/22/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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417.					Buy (add'l)	03/27/24	J		
418.					Buy (add'l)	03/28/24	J		
419.					Sold	05/21/24	K		
420. ---DEFINITIVE HELTHCARE CORP		None			Sold (part)	05/08/24	J		
421.					Sold (part)	05/09/24	J		
422.					Sold	05/10/24	J		
423. ---DIGITALBRIDGE GROUP INC	A	Dividend			Sold	05/21/24	J		
424. ---DYNATRACE HOLDINGS LLC		None			Sold	05/21/24	L	E	
425. ---EASTGROUP PROPERTIES INC	A	Dividend			Sold	05/21/24	K	E	
426. ---ENCOMPASS HEALTH CORP	A	Dividend			Sold	05/21/24	L	E	
427. ---ENPRO INC	A	Dividend			Buy (add'l)	01/08/24	J		
428.					Buy (add'l)	01/23/24	J		
429.					Buy (add'l)	03/28/24	J		
430.					Buy (add'l)	05/16/24	J		
431.					Buy (add'l)	05/17/24	J		
432.					Buy (add'l)	05/20/24	J		
433.					Sold	05/21/24	K	A	

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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434. ---ENTEGRIS INC	A	Dividend			Sold	05/21/24	L	E	
435. ---ENVESTNET INC		None			Buy (add'l)	01/03/24	J		
436.					Buy (add'l)	01/05/24	J		
437.					Buy (add'l)	01/24/24	J		
438.					Buy (add'l)	03/05/24	J		
439.					Buy (add'l)	03/06/24	J		
440.					Buy (add'l)	03/08/24	J		
441.					Buy (add'l)	04/17/24	J		
442.					Sold	05/21/24	L	D	
443. ---ESTABLISHMENT LABS HOLDINGS		None			Sold	05/21/24	L	E	
444. ---FIRST WATCH RESTAURANT GROUP		None			Sold	05/21/24	J	A	
445. ---FLUOR CORP		None			Buy	02/13/24	J		
446.					Buy (add'l)	02/14/24	J		
447.					Buy (add'l)	02/15/24	J		
448.					Buy (add'l)	02/16/24	J		
449.					Buy (add'l)	02/27/24	J		
450.					Buy (add'l)	02/28/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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451.					Buy (add'l)	03/04/24	J		
452.					Buy (add'l)	03/05/24	J		
453.					Buy (add'l)	03/22/24	J		
454.					Buy (add'l)	03/25/24	J		
455.					Buy (add'l)	03/27/24	J		
456.					Buy (add'l)	03/28/24	J		
457.					Buy (add'l)	04/04/24	J		
458.					Buy (add'l)	05/09/24	J		
459.					Buy (add'l)	05/10/24	J		
460.					Buy (add'l)	05/13/24	J		
461.					Buy (add'l)	05/14/24	J		
462.					Sold	05/21/24	K	A	
463.	---FTI CONSULTING INC		None		Sold	05/21/24	K	E	
464.	---FULLER H B CO	A	Dividend		Sold	05/21/24	L	D	
465.	---GENPACT LTD (SEE NOTE 25 IN SECTION VIII)		None		Sold (part)	01/03/24	J	A	
466.					Sold (part)	01/05/24	J	A	
467.					Sold (part)	01/08/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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468.					Sold (part)	01/12/24	J	A	
469. ---GUIDEWIRE SOFTWARE INC		None			Sold	05/21/24	K	D	
470. ----HAEMONETICS CORP		None			Buy	05/02/24	J		
471.					Buy (add'l)	05/03/24	J		
472.					Buy (add'l)	05/06/24	J		
473.					Buy (add'l)	05/07/24	J		
474.					Sold	05/21/24	J		
475. ---HEALTHEQUITY, INC		None			Sold	05/21/24	L	E	
476. ---HOULIHAN LOKEY INC	A	Dividend			Sold	05/21/24	K	D	
477. ---IDEX CORP	A	Dividend			Buy (add'l)	02/08/24	J		
478.					Buy (add'l)	02/12/24	J		
479.					Buy (add'l)	02/13/24	J		
480.					Buy (add'l)	02/14/24	J		
481.					Buy (add'l)	02/15/24	J		
482.					Buy (add'l)	02/16/24	J		
483.					Sold	05/21/24	K	D	
484. ---IMMUNOME, INC.		None			Buy	02/14/24	J		

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
485.					Sold	05/21/24	J		
486. ---INARI MED INC		None			Buy (add'l)	01/22/24	J		
487.					Buy (add'l)	01/23/24	J		
488.					Buy (add'l)	03/28/24	J		
489.					Sold	05/21/24	K		
490. ---INFINERA CORP		None			Sold	05/21/24	K		
491. ---JOHN BEAN TECHNOLOGIES CORPORATION	A	Dividend			Sold (part)	03/20/24	J		
492.					Sold (part)	05/01/24	J		
493.					Sold (part)	05/02/24	J		
494.					Sold	05/21/24	K	B	
495. ---KADANT, INC.		None			Buy	05/02/24	J		
496.					Buy (add'l)	05/03/24	J		
497.					Buy (add'l)	05/13/24	J		
498.					Buy (add'l)	05/16/24	J		
499.					Buy (add'l)	05/17/24	J		
500.					Sold	05/21/24	K	A	
501. ---KARUNA THERAPEUTICS INC		None			Sold	03/18/24	K	E	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
502. ---KNIGHT-SWIFT TRANSPORTATION HOLDINGS, INC	A	Dividend			Sold (part)	03/22/24	J	A	
503.					Sold (part)	03/25/24	J	A	
504.					Sold	05/21/24	J	C	
505. ---LATTICE SEMICONDUCTOR CORP		None			Buy (add'l)	01/31/24	J		
506.					Sold	05/21/24	K	D	
507. ---LIFESTANCE HEALTH GROUP INC		None			Buy (add'l)	02/05/24	J		
508.					Buy (add'l)	02/12/24	J		
509.					Buy (add'l)	03/28/24	J		
510.					Sold	05/21/24	K	A	
511. ---LITTELFUSE, INC	A	Dividend			Buy (add'l)	02/07/24	J		
512.					Buy (add'l)	03/28/24	J		
513.					Sold	05/21/24	K	D	
514. ---LOAR HOLDINGS INC		None			Buy	04/25/24	J		
515.					Sold	04/25/24	J	B	
516. ---MISTER CARWASH INC		None			Buy (add'l)	01/03/24	J		
517.					Buy (add'l)	01/04/24	J		
518.					Sold	05/21/24	K		

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519. ---MSA SAFETY, INC	A	Dividend			Sold	05/21/24	L	E	
520. ---MUELLER WTR PRODS INC	A	Dividend			Sold	05/21/24	K	D	
521. ---NEOGENOMICS, INC		None			Sold	05/21/24	L		
522. ---NEUROCRINE BIOSCIENCES, INC		None			Sold	05/21/24	L	E	
523. ---OCEANEERING INTERNATIONAL, INC		None			Buy	05/13/24	J		
524.					Buy (add'l)	05/16/24	J		
525.					Buy (add'l)	05/20/24	J		
526.					Sold	05/21/24	J	A	
527. ---ONTO INNOVATION INC		None			Sold (part)	05/09/24	J	B	
528.					Sold	05/21/24	J	D	
529. ---ORTHOPEDIATRICS CORP		None			Sold	05/21/24	K		
530. ---PHREESIA, INC		None			Buy (add'l)	03/27/24	J		
531.					Buy (add'l)	04/12/24	J		
532.					Buy (add'l)	04/15/24	J		
533.					Buy (add'l)	04/17/24	J		
534.					Sold	05/21/24	L	C	
535. ---PINTEREST INC		None			Sold (part)	02/08/24	J	D	

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	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000		
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000		
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000		
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536.					Sold (part)	05/01/24	J	D	
537.					Sold (part)	05/13/24	J	C	
538.					Sold	05/21/24	K	E	
539. ---POWER INTEGRATIONS INC	A	Dividend			Sold	05/21/24	K		
540. ---PROS HOLDINGS, INC		None			Sold	05/21/24	K		
541. ---PROSPERITY BANCSHARES, INC	B	Dividend			Buy (add'l)	03/28/24	J		
542.					Sold	05/21/24	L		
543. ---QUAKER HOUGHTON (FKA QUAKER CHEM CORP)	A	Dividend			Sold	05/21/24	L	D	
544. ---RENTOKIL INITIAL PLC	A	Dividend			Buy (add'l)	01/23/24	J		
545.					Sold	05/21/24	K		
546. ---SI BONE INC		None			Sold	05/21/24	K		
547. ---SIMPLY GOOD FOODS COMPANY		None			Sold (part)	03/07/24	J	A	
548.					Sold (part)	03/20/24	J	B	
549.					Sold (part)	03/21/24	J	A	
550.					Sold (part)	03/22/24	J	A	
551.					Sold (part)	04/03/24	J	A	
552.					Sold (part)	04/04/24	J	A	

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553.					Sold	05/21/24	J	D	
554. ---SITEONE LANDSCAPE SUPPLY, INC		None			Buy (add'l)	05/01/24	J		
555.					Buy (add'l)	05/13/24	J		
556.					Sold	05/21/24	K	D	
557. ---SITIME CORP		None			Buy (add'l)	02/14/24	J		
558.					Buy (add'l)	02/15/24	J		
559.					Buy (add'l)	02/16/24	J		
560.					Buy (add'l)	02/20/24	J		
561.					Buy (add'l)	03/22/24	J		
562.					Buy (add'l)	03/27/24	J		
563.					Buy (add'l)	03/28/24	J		
564.					Buy (add'l)	04/04/24	J		
565.					Sold	05/21/24	K	D	
566. ---SPDR S&P BIOTECH ETF		None			Sold	05/21/24	L	D	
567. ---SPROUT SOCIAL, INC		None			Buy	03/13/24	J		
568.					Buy (add'l)	03/14/24	J		
569.					Buy (add'l)	03/15/24	J		

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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
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570.					Buy (add'l)	03/18/24	J		
571.					Buy (add'l)	03/19/24	J		
572.					Buy (add'l)	03/21/24	J		
573.					Buy (add'l)	03/22/24	J		
574.					Buy (add'l)	03/25/24	J		
575.					Buy (add'l)	03/26/24	J		
576.					Buy (add'l)	03/28/24	J		
577.					Buy (add'l)	04/03/24	J		
578.					Buy (add'l)	04/04/24	J		
579.					Buy (add'l)	04/05/24	J		
580.					Sold	05/03/24	J		
581. ---SPX TECHNOLOGIES INC		None			Buy (add'l)	03/28/24	J		
582.					Sold	05/21/24	K	D	
583. ---TAKE-TWO INTERACTIVE SOFTWARE INC (RECVD SH FROM ZYNGA MERGER)		None			Buy	03/21/24	J		
584.					Buy (add'l)	03/27/24	J		
585.					Buy (add'l)	03/28/24	J		

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586.					Sold (part)	05/13/24	J		
587.					Sold (part)	05/14/24	J	A	
588.					Sold (part)	05/16/24	J	B	
589.					Sold	05/21/24	K	D	
590. ---TOPBUILD CORP		None			Sold	05/21/24	K	E	
591. ---VALMONT INDS INC	A	Dividend			Buy (add'l)	03/07/24	J		
592.					Buy (add'l)	03/08/24	J		
593.					Buy (add'l)	03/22/24	J		
594.					Buy (add'l)	03/25/24	J		
595.					Buy (add'l)	03/28/24	J		
596.					Buy (add'l)	05/13/24	J		
597.					Buy (add'l)	05/14/24	J		
598.					Buy (add'l)	05/15/24	J		
599.					Buy (add'l)	05/16/24	J		
600.					Buy (add'l)	05/17/24	J		
601.					Buy (add'l)	05/20/24	J		
602.					Sold	05/21/24	L	D	

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less B =$1,001 - $2,500 C =$2,501 - $5,000 D =$5,001 - $15,000 E =$15,001 - $50,000
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N =$250,001 - $500,000 O =$500,001 - $1,000,000 P1 =$1,000,001 - $5,000,000 P2 =$5,000,001 - $25,000,000
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603. ---VIZIO HLDG CORP		None			Sold	05/21/24	K	C	
604. ---WASTE CONNECTIONS INC	A	Dividend			Sold	05/21/24	M	F	
605. ---WEX, INC		None			Sold	05/21/24	K	D	
606. ---WOODWARD, INC	A	Dividend			Sold	05/21/24	K	E	
607. ---WORKIVA, INC		None			Sold	05/21/24	K	E	
608. ---XPEL INC		None			Sold (part)	05/02/24	J		
609.					Sold	05/03/24	J		
610. ---ZURN ELKAY WATER SOLUTIONS CORP	A	Dividend			Sold	05/21/24	K		
611. INVESTMENT ACCOUNT #6 AT BROWN ADVISORY/US BANK (ACM) (H)									
612. ---FIRST AMERICN GOVT OBLGTN FUND CL Z MONEY MARKET FUND FGZXX	E	Dividend	M	T	Sold (part)	01/25/24	K		
613.					Buy (add'l)	02/02/24	J		
614.					Sold (part)	02/05/24	J		
615.					Buy (add'l)	02/13/24	K		
616.					Buy (add'l)	02/22/24	K		
617.					Buy (add'l)	02/26/24	K		
618.					Sold (part)	02/27/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Wood, Kimba M.	10/06/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
619.					Sold (part)	02/29/24	J		
620.					Buy (add'l)	03/14/24	K		
621.					Sold (part)	04/25/24	K		
622.					Buy (add'l)	05/23/24	P1		
623.					Buy (add'l)	05/24/24	K		
624.					Sold (part)	05/06/24	K		
625.					Sold (part)	05/20/24	K		
626.					Sold (part)	05/28/24	P1		
627.					Sold (part)	05/29/24	L		
628.					Sold (part)	05/30/24	O		
629.					Buy (add'l)	06/04/24	J		
630.					Sold (part)	06/14/24	K		
631.					Buy (add'l)	07/02/24	J		
632.					Buy (add'l)	07/18/24	M		
633.					Sold (part)	07/24/24	L		
634.					Buy (add'l)	08/02/24	J		
635.					Sold (part)	08/05/24	K		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

Name of Person Reporting	Date of Report
Wood, Kimba M.	10/06/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
636.					Buy (add'l)	08/08/24	K		
637.					Sold (part)	08/09/24	K		
638.					Buy (add'l)	08/20/24	K		
639.					Buy (add'l)	08/26/24	J		
640.					Buy (add'l)	09/04/24	J		
641.					Sold (part)	09/09/24	L		
642.					Sold (part)	09/11/24	K		
643.					Sold (part)	09/13/24	L		
644.					Buy (add'l)	09/23/24	K		
645.					Sold (part)	10/02/24	N		
646.					Buy (add'l)	10/10/24	K		
647.					Sold (part)	10/15/24	K		
648.					Sold (part)	10/22/24	K		
649.					Buy (add'l)	10/31/24	L		
650.					Buy (add'l)	11/05/24	L		
651.					Buy (add'l)	11/06/24	K		
652.					Sold (part)	11/06/24	L		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Wood, Kimba M.	10/06/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
653.					Buy (add'l)	11/07/24	K		
654.					Sold (part)	11/20/24	M		
655.					Sold (part)	11/21/24	K		
656.					Sold (part)	11/22/24	K		
657.					Buy (add'l)	11/26/24	M		
658.					Sold (part)	12/06/24	K		
659.					Sold (part)	12/09/24	K		
660.					Buy (add'l)	12/13/24	K		
661.					Buy (add'l)	12/18/24	J		
662.					Buy (add'l)	12/19/24	K		
663.					Buy (add'l)	12/23/24	K		
664.					Sold (part)	12/31/24	K		
665. ---COMMON STOCKS (ACM) (H)									
666. ---AEROVIRONMENT INC		None	N	T	Buy (add'l)	05/23/24	L		
667.					Buy (add'l)	05/29/24	L		
668.					Buy (add'l)	10/01/24	L		
669.					Sold (part)	10/30/24	L	B	

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
670.					Sold (part)	11/05/24	K	B	
671. ---ANSYS INC		None			Sold (part)	02/09/24	K	D	
672.					Sold (part)	05/22/24	K	D	
673.					Buy (add'l)	05/23/24	K		
674.					Buy (add'l)	05/29/24	J		
675.					Sold (part)	06/13/24	K		
676.					Sold (part)	07/17/24	K	D	
677.					Sold	12/12/24	L	E	
678. ---ASPEN TECH INC		None	M	T	Buy (add'l)	05/23/24	K		
679.					Buy (add'l)	05/29/24	J		
680.					Buy (add'l)	10/01/24	J		
681. ---AZENTA INC		None	M	T	Buy (add'l)	05/23/24	J		
682.					Buy (add'l)	05/29/24	J		
683.					Buy (add'l)	10/01/24	J		
684.					Buy (add'l)	11/05/24	L		
685. ---BIO TECHNE CORP	A	Dividend	M	T	Buy (add'l)	02/01/24	J		
686.					Buy (add'l)	05/23/24	K		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less B =$1,001 - $2,500 C =$2,501 - $5,000 D =$5,001 - $15,000 E =$15,001 - $50,000
F =$50,001 - $100,000 G =$100,001 - $1,000,000 H1 =$1,000,001 - $5,000,000 H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less K =$15,001 - $50,000 L =$50,001 - $100,000 M =$100,001 - $250,000
N =$250,001 - $500,000 O =$500,001 - $1,000,000 P1 =$1,000,001 - $5,000,000 P2 =$5,000,001 - $25,000,000
P3 =$25,000,001 - $50,000,000 P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
687.					Buy (add'l)	05/29/24	K		
688.					Buy (add'l)	10/01/24	K		
689.					Buy (add'l)	11/20/24	K		
690. ---BLACKBAUD INC		None	M	T	Buy (add'l)	05/23/24	K		
691.					Buy (add'l)	05/29/24	J		
692.					Buy (add'l)	10/01/24	J		
693.					Sold (part)	11/06/24	K	A	
694. ---CERENCE INC		None	M	T	Buy (add'l)	02/09/24	J		
695.					Buy (add'l)	05/16/24	K		
696.					Buy (add'l)	05/22/24	J		
697.					Buy (add'l)	05/23/24	J		
698.					Buy (add'l)	05/24/24	J		
699.					Buy (add'l)	05/28/24	J		
700.					Buy (add'l)	05/29/24	J		
701.					Buy (add'l)	10/01/24	J		
702.					Sold (part)	12/20/24	J		
703. ---COGNEX CORP	A	Dividend	M	T	Buy (add'l)	05/02/24	K		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
B =$1,001 - $2,500
C =$2,501 - $5,000
D =$5,001 - $15,000
E =$15,001 - $50,000
F =$50,001 - $100,000
G =$100,001 - $1,000,000
H1 =$1,000,001 - $5,000,000
H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
P1 =$1,000,001 - $5,000,000
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3. Value Method Codes (See Column C2)
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
704.					Buy (add'l)	05/23/24	K		
705.					Buy (add'l)	05/29/24	K		
706.					Buy (add'l)	10/01/24	J		
707.					Sold (part)	12/17/24	K		
708.					Sold (part)	12/18/24	K		
709. ---COGNYTE SOFTWARE LTD		None	N	T	Buy (add'l)	05/23/24	K		
710.					Buy (add'l)	05/29/24	K		
711.					Buy (add'l)	10/01/24	K		
712.					Buy (add'l)	11/21/24	K		
713. ---COMMVAULT SYSTEMS INC		None	N	T	Buy (add'l)	05/23/24	K		
714.					Buy (add'l)	05/29/24	K		
715.					Buy (add'l)	10/01/24	K		
716. ---COSTAR GROUP INC		None	M	T	Buy (add'l)	05/23/24	K		
717.					Buy (add'l)	05/29/24	K		
718.					Buy (add'l)	10/01/24	K		
719.					Buy (add'l)	10/11/24	K		
720. ---CYBERARK SOFTWARE LTD ISRAEL		None	O	T	Buy (add'l)	05/23/24	L		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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721.					Buy (add'l)	05/29/24	K		
722.					Sold (part)	08/19/24	K	C	
723.					Buy (add'l)	10/01/24	K		
724. ---DEXCOM INC		None	M	T	Buy (add'l)	05/23/24	K		
725.					Buy (add'l)	05/29/24	K		
726.					Buy (add'l)	10/01/24	J		
727. ---FACTSET RESEARCH SYSTEMS INC	B	Dividend	M	T	Sold (part)	02/20/24	K	D	
728.					Buy (add'l)	05/23/24	K		
729.					Buy (add'l)	05/29/24	K		
730.					Buy (add'l)	10/01/24	K		
731. ---FORTINET INC		None	M	T	Sold (part)	05/22/24	J	D	
732.					Buy (add'l)	05/23/24	K		
733.					Buy (add'l)	05/29/24	K		
734.					Sold (part)	07/17/24	L		
735.					Sold (part)	08/07/24	M	E	
736. ---GENTEX CORP	B	Dividend	M	T	Buy (add'l)	05/23/24	K		
737.					Buy (add'l)	05/29/24	K		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000	
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000		
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000		
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000		
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000			
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738.					Buy (add'l)	10/01/24	J		
739. ---GUIDEWIRE SOFTWARE INC		None	N	T	Buy (add'l)	05/23/24	K		
740.					Buy (add'l)	05/29/24	K		
741.					Buy (add'l)	10/01/24	K		
742. ---ICON PLC		None			Sold (part)	02/09/24	K	E	
743.					Sold	02/22/24	K	E	
744. ---IDEXX LABS INC		None	M	T	Buy (add'l)	05/23/24	K		
745.					Buy (add'l)	05/29/24	K		
746.					Sold (part)	07/17/24	L		
747. ---JACK HENRY ASSOCIATES INC	B	Dividend	M	T	Buy (add'l)	05/23/24	K		
748.					Buy (add'l)	05/29/24	K		
749.					Buy (add'l)	10/01/24	K		
750. ---KORNIT DIGITAL LTD		None	M	T	Buy (add'l)	05/23/24	J		
751.					Buy (add'l)	05/29/24	J		
752.					Buy (add'l)	10/01/24	J		
753.					Sold (part)	11/06/24	K		
754.					Sold (part)	12/20/24	K	C	

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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755. ---KRATOS DEFENSE & SECURITY SOLUTIONS		None	M	T	Buy	02/23/24	K		
756.					Buy (add'l)	05/23/24	J		
757.					Buy (add'l)	05/29/24	J		
758.					Buy (add'l)	08/02/24	K		
759.					Buy (add'l)	08/08/24	K		
760.					Buy (add'l)	09/06/24	K		
761. ---LIVERAMP HOLDINGS INC		None	L	T	Buy	02/09/24	K		
762.					Buy (add'l)	04/23/24	K		
763.					Buy (add'l)	05/23/24	K		
764.					Buy (add'l)	05/28/24	L		
765.					Buy (add'l)	07/23/24	L		
766.					Sold (part)	11/25/24	M		
767. ---MANHATTAN ASSOCS INC		None	N	T	Sold (part)	01/31/24	J	D	
768.					Sold (part)	03/12/24	K	E	
769.					Buy (add'l)	05/23/24	L		
770.					Buy (add'l)	05/29/24	K		
771.					Sold (part)	08/23/24	J	A	

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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772.					Sold (part)	09/20/24	K	D	
773.					Sold (part)	10/09/24	K	D	
774. ---MEDPACE HOLDINGS INC		None	N	T	Buy (add'l)	05/23/24	L		
775.					Buy (add'l)	05/29/24	K		
776.					Buy (add'l)	10/01/24	K		
777. ---MORNINGSTAR INC	A	Dividend	M	T	Buy (add'l)	05/23/24	K		
778.					Buy (add'l)	05/29/24	K		
779.					Buy (add'l)	10/01/24	K		
780. ---NCINO OPCO INC		None	M	T	Buy	09/12/24	L		
781.					Buy (add'l)	10/11/24	K		
782.					Buy (add'l)	12/05/24	K		
783. ---NEOGEN CORP		None	M	T	Buy (add'l)	05/23/24	J		
784.					Buy (add'l)	05/29/24	J		
785.					Buy (add'l)	09/06/24	K		
786.					Buy (add'l)	09/10/24	K		
787.					Buy (add'l)	12/06/24	K		
788.					Buy (add'l)	12/17/24	K		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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789. ---NICE LTD ADR		None	M	T	Buy (add'l)	05/23/24	K		
790.					Buy (add'l)	05/29/24	K		
791.					Buy (add'l)	10/01/24	K		
792. ---PAYCOM SOFTWARE INC	A	Dividend	M	T	Buy (add'l)	05/23/24	K		
793.					Buy (add'l)	05/29/24	J		
794.					Buy (add'l)	08/02/24	K		
795.					Sold (part)	12/17/24	K		
796. ---QUALYS INC		None	M	T	Buy (add'l)	05/23/24	K		
797.					Buy (add'l)	05/29/24	K		
798.					Buy (add'l)	10/01/24	K		
799.					Sold (part)	11/04/24	L		
800. ---RBC BEARINGS INC		None	N	T	Buy (add'l)	05/23/24	K		
801.					Buy (add'l)	05/29/24	K		
802.					Buy (add'l)	10/01/24	K		
803. ---REPLIGEN CORP		None	M	T	Buy (add'l)	05/23/24	K		
804.					Buy (add'l)	05/29/24	J		
805.					Buy (add'l)	06/13/24	K		

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806.					Buy (add'l)	11/20/24	K		
807. ---RESMED INC	B	Dividend	M	T	Buy (add'l)	05/23/24	K		
808.					Buy (add'l)	05/29/24	K		
809. ---SEI INVESTMENTS CO		None	L	T	Buy	11/19/24	L		
810. ---SPS COMMERCE INC		None	M	T	Buy (add'l)	05/23/24	K		
811.					Buy (add'l)	05/29/24	J		
812.					Buy (add'l)	10/01/24	J		
813. ---STAAR SURGICAL CO		None	M	T	Buy (add'l)	01/23/24	K		
814.					Buy (add'l)	02/27/24	J		
815.					Buy (add'l)	05/23/24	K		
816.					Buy (add'l)	05/29/24	J		
817.					Buy (add'l)	09/06/24	K		
818.					Buy (add'l)	10/21/24	K		
819.					Buy (add'l)	12/17/24	K		
820. ---TRADEWEB MARKETS INC	A	Dividend	M	T	Buy (add'l)	05/23/24	K		
821.					Buy (add'l)	05/29/24	J		
822.					Buy (add'l)	10/01/24	J		

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823.					Sold (part)	10/30/24	K	B	
824. ---TREX CO INC		None	L	T	Buy	11/19/24	L		
825. ---VARONIS SYSTEMS INC		None	L	T	Buy	12/12/24	L		
826.					Buy (add'l)	12/30/24	K		
827. ---VEEVA SYSTEMS INC		None	M	T	Buy (add'l)	05/23/24	K		
828.					Buy (add'l)	05/29/24	J		
829.					Buy (add'l)	10/01/24	J		
830. CITI BROKERAGE ACCOUNT - BANK DEPOSIT	A	Interest	L	T					
831. ADDL CMN STCKS, OPTNS & FUNDS (NON-IRA) (H)									
832. ABBOTT LABS COMMON STOCK	B	Dividend	L	T	Buy (add'l)	06/26/24	J		
833.					Buy (add'l)	12/19/24	J		
834. ABBVIE, INC COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	B	
835.					Buy (add'l)	12/19/24	J		
836. AIR PRODS & CHEMS COMMON STOCK	A	Dividend			Sold (part)	04/08/24	J	A	
837.					Sold	07/26/24	K	E	
838. ALPHABET COMMON STOCK	D	Dividend	P1	T					
839. AMAZON.COM COMMON STOCK		None	P1	T					

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840. ANALOG DEVICES COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	B	
841. APPLE INC COMMON STOCK	C	Dividend	O	T	Sold (part)	04/08/24	J	B	
842.					Buy (add'l)	06/26/24	M		
843. AUTOMATIC DATA PROCESSING COMMON STOCK	B	Dividend	L	T					
844. BERKSHIRE HATHAWAY COMMON STOCK		None	P1	T					
845. BLACKROCK INC COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	B	
846. BLACKSTONE GROUP COMMON STOCK	E	Dividend	P1	T					
847. BROADCOM, INC COMMON STOCK	C	Dividend	N	T	Sold (part)	03/05/24	K	E	
848.					Sold (part)	04/08/24	K	E	
849.					Sold (part)	06/26/24	K	E	
850. CATERPILLAR COMMON STOCK	A	Dividend	L	T	Sold (part)	04/08/24	J	B	
851. CAVA GROUP INC		None	N	T	Buy	03/01/24	M		
852. CHEVRON COMMON STOCK	C	Dividend	M	T	Sold (part)	04/08/24	J	A	
853.					Buy (add'l)	06/26/24	K		
854. CINTAS CORPORATION COMMON STOCK	C	Dividend	O	T					
855. CME GROUP COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	A	
856. CMS ENERGY COMMON STOCK	B	Dividend	K	T	Sold (part)	04/08/24	J	A	

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857. COCA COLA COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	A	
858. COMCAST COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	A	
859. COSTCO WHOLESALE COMMON STOCK	E	Dividend	O	T					
860. CROWN CASTLE COMMON STOCK	B	Dividend	K	T	Sold (part)	04/08/24	J		
861. CUMMINS COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	A	
862. GE AEROSPACE ("GE")	B	Dividend	N	T	Buy	02/26/24	M		
863. GE HEALTHCARE TECHNOLOGIES INC COMMON STOCK	A	Dividend			Sold	06/20/24	N	E	
864. GE VERNOVA LLC		None	N	T	Buy	05/06/24	M		
865. HOME DEPOT COMMON STOCK	E	Dividend	O	T					
866. HONEYWELL COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	A	
867. INTUIT COMMON STOCK	C	Dividend	O	T					
868. JOHNSON & JOHNSON COMMON STOCK	E	Dividend	O	T					
869. JPMORGAN CHASE COMMON STOCK	C	Dividend	M	T	Sold (part)	04/08/24	J	C	
870. LOCKHEED MARTIN CORP COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	A	
871. MCDONALDS INC COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	A	
872. MEDTRONIC PLC COMMON STOCK	B	Dividend	K	T	Sold (part)	04/08/24	J		
873. MERCK & CO COMMON STOCK	D	Dividend	M	T	Sold (part)	04/08/24	J	C	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
874. MICROSOFT COMMON STOCK	E	Dividend	P1	T	Sold (part)	03/05/24	J	D	
875.					Sold (part)	04/08/24	J	D	
876. MONDELEZ INTL COMMON STOCK	B	Dividend	L	T	Sold (part)	04/08/24	J	B	
877. NVIDIA CORP COMMON STOCK	A	Dividend	P1	T	Buy (add'l)	02/06/24	M		
878. ORACLE CORP COMMON STOCK	B	Dividend	M	T	Sold (part)	04/08/24	J	B	
879. O'REILLY AUTOMOTIVE, INC COMMON STOCK		None	N	T					
880. PEPSICO COMMON STOCK	C	Dividend	L	T	Sold (part)	04/08/24	J	B	
881. PROCTER & GAMBLE COMMON STOCK	B	Dividend	M	T	Sold (part)	04/08/24	J	B	
882. RTX CORP	B	Dividend	L	T	Buy (add'l)	06/26/24	J		
883. SCHLUMBERGER LTD	A	Dividend	K	T	Buy	07/26/24	K		
884. SEMPRA ENERGY COMMON STOCK	C	Dividend	L	T	Sold (part)	04/08/24	J	A	
885.					Buy (add'l)	06/26/24	J		
886. TARGET INC COMMON STOCK	B	Dividend	L	T	Buy (add'l)	06/26/24	J		
887. TRANSDIGM GRP COMMON STOCK	F	Dividend	P1	T	Buy (add'l)	02/06/24	M		
888.					Buy (add'l)	05/21/24	M		
889. UNION PACIFIC COMMON STOCK	A	Dividend	K	T	Sold (part)	04/08/24	J	A	
890. UNITEDHEALTH GROUP COMMON STOCK	B	Dividend	M	T	Sold (part)	03/01/24	O	A	

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
891.					Sold (part)	04/08/24	J	B	
892. VISA INC COMMON STOCK	D	Dividend	P1	T	Sold (part)	04/08/24	J	A	
893.					Buy (add'l)	06/26/24	K		
894. WALMART CORP COMMON STOCK	A	Dividend	L	T	Sold (part)	04/08/24	J	A	
895. WELLS FARGO & CO COMMON STOCK	C	Dividend	M	T	Buy (add'l)	03/05/24	J		
896.					Sold (part)	04/08/24	J	A	
897. INVESTMNT A/C #7 BROWN ADVISORY/US BANK IRA A/C #2 (MOVED FROM MS) (H)									
898. ---FIRST AMERICAN GOVERNMENT OBLIG FUND CL Z MONEY MARKET FUND FGZXX	D	Dividend	L	T	Open	03/26/24	J		
899.					Buy (add'l)	03/27/24	J		
900.					Buy (add'l)	05/22/24	N		
901.					Buy (add'l)	05/23/24	O		
902.					Sold (part)	05/24/24	O		
903.					Sold (part)	05/30/24	M		
904.					Sold (part)	06/27/24	M		
905.					Buy (add'l)	07/02/24	J		
906.					Buy (add'l)	08/02/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
907.					Buy (add'l)	08/22/24	J		
908.					Buy (add'l)	09/04/24	J		
909.					Sold (part)	09/25/24	M		
910.					Buy (add'l)	10/02/24	J		
911.					Buy (add'l)	11/04/24	J		
912.					Buy (add'l)	11/21/24	J		
913.					Sold (part)	12/19/24	J		
914.	---U.S. TREASURY BILLS (SEE NOTE 6 IN SECTION VIII)	A	Interest	J	T				
915.	---FIXED INCOME MUTUAL FUNDS (H)								
916.	---METROOPOLITAN WEST UNCON BOND FUND	A	Dividend	L	T	Buy	09/24/24	L	
917.	---ARTISAN HIGH INCOME FUND	B	Dividend	L	T	Buy	05/23/24	K	
918.	---VOYA INTERMEDIATE BOND FUND	C	Dividend	M	T	Buy	05/23/24	L	
919.	---US EQUITY MUTUAL FUNDS (H)								
920.	---BROWN ADVISORY SUSTAINABLE GROWTH FUND	E	Dividend	N	T	Buy	05/23/24	M	
921.						Buy (add'l)	09/24/24	L	
922.						Buy (add'l)	12/16/24	K	
923.	---BROWN ADVISORY SUSTAINABLE VALUE FUND	D	Dividend	N	T	Buy	05/23/24	M	

1. Income Gain Codes: (See Columns B1 and D4) A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
924.						Buy (add'l)	09/24/24	K		
925.						Buy (add'l)	12/17/24	J		
926. ---NON US EQUITIES (H)										
927. ---EGERTON INVESTMENT PARTNERS, LP (SEE NOTE 1 IN SECT VIII)	D	Distribution	M	U	Buy	07/01/24	M		
928. ---PRIVATE EQUITY (H)										
929. ---BROWN ADVISORY PRIVATE EQUITY (NOTES 9, 15, 17 & 22 SECT VIII)		None	J	U	Buy	12/19/24	J		
930. (INVESTS IN HEALTHCARE, TECH & INDUSTRIAL)										
931. ---INV A/C #8 AT BROWN ADVISORY/ US BANK - ACM A/C FOR IRA #2 (H)										
932. ---FIRST AMERICAN GOVT OBLIG FUND CL Z MONEY MARKET FUND FGZXX	A	Interest	J	T	Open	05/30/24	M		
933.						Sold (part)	06/03/24	L		
934.						Sold (part)	07/01/24	K		
935.						Buy (add'l)	08/08/24	J		
936.						Sold (part)	08/30/24	K		
937.						Sold (part)	09/09/24	J		
938.						Sold (part)	09/13/24	J		
939.						Sold (part)	10/02/24	J		

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940.					Buy (add'l)	10/07/24	J		
941.					Buy (add'l)	10/31/24	J		
942.					Sold (part)	11/06/24	J		
943.					Sold (part)	11/20/24	J		
944. ---US EQUITIES (H)									
945. ---AEROVIRONMENT, INC		None	J	T	Buy	05/31/24	J		
946.					Buy (add'l)	06/28/24	J		
947.					Buy (add'l)	08/29/24	J		
948.					Sold (part)	10/30/24	J	A	
949. ---ANSYS, INC		None			Buy	05/31/24	J		
950.					Sold	12/12/24	J	A	
951. ---ASPEN TECHNOLOGY, INC		None	J	T	Buy	05/31/24	J		
952. ---AZENTA INC		None	J	T	Buy	11/05/24	J		
953. ---BIO-TECHNE CORP	A	Dividend	J	T	Buy	05/31/24	J		
954. ---BLACKBAUD, INC		None	J	T	Buy	05/31/24	J		
955. ---CERENCE, INC (SEE NOTE 25 IN SECT VIII)		None	J	T					
956. ---COGNEX CORP	A	Dividend	J	T	Buy	05/31/24	J		

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957. ---COGNYTE SOFTWARE, LTD		None	J	T	Buy	05/31/24	J		
958.					Buy (add'l)	06/28/24	J		
959. ---COMMVAULT SYSTEMS, INC		None	J	T	Buy	05/31/24	J		
960.					Buy (add'l)	06/28/24	J		
961.					Buy (add'l)	08/29/24	J		
962. ---COSTAR GROUP, INC		None	J	T	Buy	05/31/24	J		
963. ---CYBERARK SOFTWARE, LTD		None	J	T	Buy	05/31/24	J		
964.					Buy (add'l)	06/28/24	J		
965.					Buy (add'l)	08/29/24	J		
966. ---DEXCOM, INC		None	J	T	Buy	05/31/24	J		
967. ---FACTSET RESEARCH SYSTEMS, INC	A	Dividend	J	T	Buy	05/31/24	J		
968. ---FORTINET, INC		None	J	T	Buy	05/31/24	J		
969.					Buy (add'l)	06/28/24	J		
970.					Sold (part)	08/07/24	J	A	
971. ---GENTEX CORP	A	Dividend	J	T	Buy	05/31/24	J		
972. ---GUIDEWIRE SOFTWARE, INC		None	J	T	Buy	05/31/24	J		
973. ---IDEXX LABORATORIES, INC		None	J	T	Buy	05/31/24	J		

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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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974.					Buy (add'l)	06/28/24	J		
975. ---JACK HENRY & ASSOCIATES, INC	A	Dividend	J	T	Buy	05/31/24	J		
976. ---KORNIT DIGITAL, LTD (SEE NOTE 25 IN SECT VIII)		None	J	T					
977. ---KRATOS DEFENSE & SECURITY SOLUTIONS, INC (SEE NOTE 25 IN SECT VIII)		None	J	T					
978. ---LIVERAMP HOLDINGS, INC		None	J	T	Buy	05/31/24	J		
979.					Sold (part)	10/11/24	J		
980. ---MANHATTAN ASSOCIATES, INC		None	J	T	Buy	05/31/24	J		
981.					Buy (add'l)	06/28/24	J		
982. ---MEDPACE HOLDINGS, INC		None	J	T	Buy	05/31/24	J		
983.					Buy (add'l)	06/28/24	J		
984.					Buy (add'l)	08/29/24	J		
985. ---MORNINGSTAR, INC	A	Dividend	J	T	Buy	05/31/24	J		
986. ---NCINO OPCO, INC		None	J	T	Buy	09/12/24	J		
987. ---NEOGEN CORP (SEE NOTE 25 IN SECT VIII)		None	J	T					
988. ---NICE, LTD		None	J	T	Buy	05/31/24	J		
989.					Buy (add'l)	06/28/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
990. ---PAYCOM SOFTWARE, INC (SEE NOTE 25 IN SECT VIII)	A	Dividend	J	T					
991. ---QUALYS, INC		None	J	T	Buy	05/31/24	J		
992.					Buy (add'l)	06/28/24	J		
993.					Sold (part)	10/04/24	J		
994. ---RBC BEARINGS, INC		None	J	T	Buy	05/31/24	J		
995.					Buy (add'l)	06/28/24	J		
996. ---REPLIGEN CORP		None	J	T	Buy	05/31/24	J		
997. ---RESMED, INC	A	Dividend	J	T	Buy	05/31/24	J		
998. ---SEI INVESTMENTS CO		None	J	T	Buy	11/19/24	J		
999. ---SPS COMMERCE, INC		None	J	T	Buy	05/31/24	J		
1000. ---STAAR SURGICAL COMPANY		None	J	T	Buy	05/31/24	J		
1001. ---TRADEWEB MARKETS INC	A	Dividend	J	T	Buy	05/31/24	J		
1002. ---TREX CO, INC		None	J	T	Buy	11/19/24	J		
1003. ---VARONIS SYSTEMS, INC		None	J	T	Buy	12/12/24	J		
1004. ---VEEVA SYSTEMS, INC		None	J	T	Buy	05/31/24	J		
1005. ---FEDERATED HERMES GOVT OBL AVR MONEY MARKET FUND GOVXX	A	Dividend			Sold	03/22/24	J		
1006. ---BARON GROWTH INSTITUTIONAL FUND (BGRIX)		None			Sold	05/21/24	K	B	

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1007. ---BNY MELLON GLB EMERG MKTS FUND (DGIEX)		None			Sold	05/21/24	K	B	
1008. ---FIDELITY ADV ENERGY (FANIX)		None			Sold	05/21/24	K	C	
1009. ---FIDELITY ADV HEALTH CARE FUND (FHCIX)		None			Sold	05/21/24	K	C	
1010. ---FRANKLIN INTL GROWTH ADV FUND (FNGZX)		None			Sold	01/23/24	K		
1011. ---GOLDMAN SACHS GQG INTL OPP FUND (GSIMX)		None			Sold	05/21/24	K	D	
1012. ---GQG PARTNERS EMRG MKTS EQ INS FUND (GQGIX)		None			Sold	05/21/24	K	C	
1013. ---INVESCO S&P 500 GARP ETF (SPGP)	A	Dividend			Sold	05/21/24	L	E	
1014. ---ISHARES CORE S&P US GROWTH FUND (IUSG)	A	Dividend			Sold	05/21/24	M	E	
1015. ---ISHARES EDGE MSCI MIN VOL USA FUND (USMV)	A	Dividend			Sold	05/21/24	K	C	
1016. ---ISHARES EDGE MSCI US QLTY FAC FUND (QUAL)	A	Dividend			Sold	05/21/24	M	E	
1017. ---ISHARES N AMERICAN TECH SOFT FUND (IGV)		None			Sold	05/21/24	K	D	
1018. ---ISHARES S&P MIDCAP 400 INDEX FUND (IJH)	A	Dividend			Sold	05/21/24	K	E	
1019. ---ISHARES S&P 500 VAL ETF (IVE)	A	Dividend			Sold	05/21/24	K	D	
1020. ---NEUBERGER INTRINSIC VALUE INST FUND (NINLX)		None			Sold	05/21/24	K	B	
1021. ---PROSHARES TR S&P 500 DV ARIST FUND (NOBL)	A	Dividend			Sold	05/21/24	L	E	
1022. ---VANGUARD INFO TECH ETF (VGT)	A	Dividend			Sold	05/21/24	K	D	
1023. ---VANGUARD S&P 500 ETF (VOO)	A	Dividend			Sold	05/21/24	M	E	

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1024. ---VIRTUS KAR MID-CAP CORE FUND (VIMCX)		None			Sold	05/21/24	L	D	
1025. ---WCM FOCUSED INTERNATIONAL GROWTH FUND (WCMIX)		None			Buy	01/23/24	K		
1026.					Sold	05/21/24	K	B	
1027. ---WISDOMTREE JAPAN EQUITY (DNL)	A	Dividend			Sold	05/21/24	K	C	
1028. ---WISDOMTREE TR SMALLCAP FUND (EES)	A	Dividend			Sold	05/21/24	K	B	
1029. CITI US FI PORTFOLIO TAX-EXEMPT INVESTMENT A/C (H)									
1030. ---CITI - WESTERN ASSET INST GOVT MONEY MKT FUND #2 - INGXX (CITIMUNI)	E	Dividend	M	T	Buy (add'l)	01/02/24	J		
1031.					Buy (add'l)	01/10/24	O		
1032.					Sold (part)	01/12/24	J		
1033.					Sold (part)	01/25/24	N		
1034.					Sold (part)	01/30/24	P1		
1035.					Sold (part)	01/31/24	N		
1036.					Buy (add'l)	02/01/24	K		
1037.					Sold (part)	02/01/24	N		
1038.					Sold (part)	02/02/24	M		
1039.					Sold (part)	02/14/24	O		

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1040.					Sold (part)	02/29/24	M		
1041.					Buy (add'l)	03/01/24	J		
1042.					Sold (part)	03/01/24	N		
1043.					Sold (part)	03/13/24	N		
1044.					Sold (part)	03/14/24	N		
1045.					Buy (add'l)	03/15/24	J		
1046.					Sold (part)	03/22/24	M		
1047.					Sold (part)	03/28/24	N		
1048.					Buy (add'l)	04/01/24	K		
1049.					Sold (part)	04/12/24	J		
1050.					Sold (part)	04/18/24	M		
1051.					Sold (part)	04/24/24	M		
1052.					Buy (add'l)	05/01/24	J		
1053.					Sold (part)	05/01/24	M		
1054.					Buy (add'l)	05/02/24	N		
1055.					Sold (part)	05/02/24	M		
1056.					Buy (add'l)	05/09/24	N		

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1057.					Sold (part)	05/13/24	M		
1058.					Sold (part)	05/14/24	J		
1059.					Buy (add'l)	05/15/24	J		
1060.					Sold (part)	05/15/24	N		
1061.					Sold (part)	05/16/24	N		
1062.					Buy (add'l)	05/23/24	N		
1063.					Sold (part)	05/24/24	N		
1064.					Sold (part)	05/30/24	M		
1065.					Buy (add'l)	06/03/24	J		
1066.					Sold (part)	06/14/24	J		
1067.					Buy (add'l)	06/17/24	J		
1068.					Buy (add'l)	07/01/24	J		
1069.					Sold (part)	07/15/24	J		
1070.					Sold (part)	08/14/24	J		
1071.					Buy (add'l)	09/03/24	J		
1072.					Sold (part)	09/13/24	J		
1073.					Buy (add'l)	09/16/24	J		

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1074.					Buy (add'l)	10/01/24	J		
1075.					Sold (part)	10/02/24	M		
1076.					Buy (add'l)	10/03/24	N		
1077.					Sold (part)	10/15/24	J		
1078.					Buy (add'l)	11/01/24	J		
1079.					Buy (add'l)	11/15/24	K		
1080.					Sold (part)	11/15/24	J		
1081.					Buy (add'l)	12/02/24	J		
1082.					Sold (part)	12/13/24	J		
1083.					Buy (add'l)	12/16/24	J		
1084. ---LONG ISLAND NY POER AUTHORITY BOND (6/1/24) 3.95%	C	Interest			Buy	01/30/24	N		
1085.					Sold	05/23/24	N		
1086. ---METROPOLITAN TRANSPORTATION AUTHORITY NY-LOC BOND (6/1/24) 3.77%	C	Interest			Buy	01/30/24	N		
1087.					Sold	05/02/24	N		
1088. ---NEW YORK CITY NY HOUSING DEVELOPMENT CORP BOND (6/1/24) 3.55%	C	Interest			Buy	01/30/24	N		
1089.					Sold	05/09/24	N		

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1090. ---NEW YORK CITY NY MUNI WATER FINANCE AUTHORITY BOND (6/15/28) 5%	D	Interest			Buy	02/01/24	N		
1091.					Sold	02/01/24	N		
1092. ---NORTH HEMPSTEAD NY GO BOND (3/21/25) 4%		None	N	T	Buy	03/13/24	N		
1093. ---LANCASTER NY CEN SCH DIST BOND (6/6/25) 4.5%		None	N	T	Buy	05/15/24	N		
1094. ---NEW YORK ST TWY AUTH GEN REV BOND (1/1/27) 5%	C	Interest	M	T	Buy	02/01/24	M		
1095. ---NEW YORK ST URBAN DEV CORP REV BOND (3/15/34) 5%	D	Interest	N	T	Buy	02/14/24	N		
1096. ---NEW YORK NYC TRANSITIONAL FIN BOND (5/1/26) 5%	D	Interest	N	T	Buy	05/16/24	N		
1097. ---NJ ST TRNSN TR FD BOND (6/15/31) 5%	C	Interest	M	T	Buy	04/18/24	M		
1098. ---NEW YORK ST DORM AUTH REVS BOND (7/1/29) 5%	B	Interest	M	T	Buy	02/29/24	M		
1099. ---NEW YORK ST DORM AUTH REVS BOND (10/1/28) 5%	D	Interest	M	T	Buy	02/14/24	M		
1100. ---TRIBOROUGH BRDG & TUNL AUTH BOND (3/15/27) 5%	D	Interest	N	T	Buy	03/28/24	N		
1101. ---TRIBOROUGH BRDG & TUNL AUTH BOND (11/15/35) 5%	D	Interest	N	T	Buy	05/24/24	N		
1102. ---ILLINOIS ST GO BONDS (11/1/29) 5%	C	Interest	M	T	Buy	03/22/24	M		
1103. ---TRIBOROUGH BRDG & TUNL AUTH BOND (11/15/27) 5%	C	Interest	M	T	Buy	05/02/24	M		
1104. ---METROPOLITAN TRANSN AUTH NY BOND (11/15/30) 5%	C	Interest	M	T	Buy	05/13/24	M		
1105. ---NEW YORK ST DORM AUTH ST PER BOND (3/15/29) 5%	D	Interest	N	T	Buy	03/14/24	N		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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Name of Person Reporting	Date of Report
Wood, Kimba M.	10/06/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1106. ---COLORADO HEALTH FACS AUTH BOND (12/1/29) 5%	C	Interest	M	T	Buy	03/14/24	M		
1107. ---MAIN STR NAT GAS INC GAS BOND (5/1/54) 5%	D	Interest	N	T	Buy	01/25/24	N		
1108. ---PORT AUTH NY & NJ CONSOLIDATED BOND (7/15/33) 5%	A	Interest	M	T	Buy	05/01/24	M		
1109. ---NEW YORK ST TWY AUTH GEN REV BOND (1/1/37) 5%	C	Interest	N	T	Buy	01/31/24	N		
1110. ---NEW YORK NY GO BOND (3/1/38) 5%	D	Interest	N	T	Buy	02/29/24	N		
1111. ---NASSAU CNTY NY GO IMPT BOND (4/1/39) 5%		None	M	T	Buy	05/30/24	M		
1112. ---NEW YORK ST DORM AUTH REVS BOND (5/1/34) 5%		None	M	T	Buy	10/02/24	M		
1113. ---TRIBOROUGH BRDG & TUNL AUTH BOND (5/15/38) 5%	D	Interest	M	T	Buy	02/02/24	M		
1114. ---NEW YORK ST ENVIRONMENTAL FACS BOND (6/15/36) 5%	D	Interest	M	T	Buy	04/24/24	M		
1115. PUT ACCT (NOTE 3 IN SECT VIII) (H)									
1116. ---XSP PUT - CONTRACT OPENED (EXPIRES 8/16/24)		None			Sold	05/02/24	J	B	
1117. ---XSP PUT - CONTRACT OPENED (EXPIRES 10/31/2024)		None			Sold	08/08/24	J	B	
1118. ---XSP PUT - CONTRACT OPENED (EXPIRES 6/21/2024)		None			Sold	04/15/24	J	B	
1119. ---XSP PUT - CONTRACT OPENED (EXPIRES 11/15/2024)		None			Sold	09/06/24	J	B	
1120. ---XSP PUT - CONTRACT OPENED (EXPIRES 9/20/2024)		None			Sold	07/01/24	J	A	
1121. ---XSP PUT - CONTRACT OPENED (EXPIRES 11/15/2024)		None			Sold	09/17/24	J	B	
1122. ---XSP PUT - CONTRACT OPENED (EXPIRES 12/20/2024)		None			Sold	09/23/24	J	B	

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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1123. ---XSP PUT - CONRACT OPENED (EXPIRES 11/29/2024)		None			Sold	10/01/24	J	B	
1124. ---XSP PUT - CONTRACT OPENED (EXPIRES 12/6/2024)		None			Sold	10/15/24	J	B	
1125. ---XSP PUT - CONTRACT OPENED (EXPIRES 1/17/2025)		None			Sold	10/22/24	J		
1126. ---XSP PUT - CONTRACT OPENED (EXPIRES 2/21/2025)		None			Sold	12/27/24	J		
1127. ---XSP PUT - CONTRACT OPENED (EXPIRES 2/28/2025)		None			Sold	12/10/24	J		
1128. VARIOUS CASH/S/T INVESTS/MM(F) ACCTS (LINES 1078-1142) (H)									
1129. GOLDMN SACHS BANK MM/CASH	E	Interest	O	T					
1130. ---US TREASURY BILL (SEE NOTE 6 IN SECTION VIII)	D	Interest							
1131. GOLDMN SACHS (PUT) MM/CSH	B	Interest	K	T					
1132. GOLDMAN SACHS DEPOSIT/CASH #2 (FDN)	D	Interest	O	T					
1133. CITIBANK CHECKING ACCOUNT - FOUNDATION		None	K	T					
1134. CITIBANK INTEREST CHECKING ACCOUNT #1 (FERP)	A	Interest	L	T					
1135. CITIBANK CHECKING ACCOUNT (HH)		None	L	T					
1136. CITI - WESTERN ASSET INST GOVT MONEY MARKET FUND #1- INGXX (DIV KNGHT)	D	Dividend	L	T	Buy (add'l)	01/02/24	J		
1137.					Buy (add'l)	01/05/24	J		
1138.					Buy (add'l)	01/08/24	J		

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1139.					Sold (part)	01/10/24	O		
1140.					Buy (add'l)	01/12/24	J		
1141.					Sold (part)	01/12/24	J		
1142.					Buy (add'l)	01/16/24	J		
1143.					Buy (add'l)	01/18/24	J		
1144.					Buy (add'l)	02/01/24	J		
1145.					Sold (part)	02/07/24	N		
1146.					Sold (part)	02/14/24	J		
1147.					Buy (add'l)	02/15/24	J		
1148.					Buy (add'l)	03/01/24	J		
1149.					Buy (add'l)	03/05/24	K		
1150.					Sold (part)	03/05/24	J		
1151.					Buy (add'l)	03/11/24	J		
1152.					Sold (part)	03/14/24	J		
1153.					Buy (add'l)	03/15/24	J		
1154.					Buy (add'l)	03/29/24	J		
1155.					Buy (add'l)	04/01/24	J		

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1156.					Buy (add'l)	04/08/24	M		
1157.					Sold (part)	04/10/24	M		
1158.					Sold (part)	04/12/24	J		
1159.					Buy (add'l)	04/24/24	J		
1160.					Sold (part)	05/14/24	J		
1161.					Buy (add'l)	05/15/24	J		
1162.					Buy (add'l)	06/03/24	J		
1163.					Buy (add'l)	06/10/24	J		
1164.					Sold (part)	06/14/24	J		
1165.					Buy (add'l)	06/26/24	K		
1166.					Sold (part)	06/26/24	L		
1167.					Buy (add'l)	06/28/24	J		
1168.					Buy (add'l)	07/01/24	J		
1169.					Sold (part)	07/15/24	J		
1170.					Buy (add'l)	07/26/24	K		
1171.					Sold (part)	07/26/24	K		
1172.					Sold (part)	08/14/24	J		

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1173.					Buy (add'l)	08/15/24	J		
1174.					Buy (add'l)	09/03/24	J		
1175.					Buy (add'l)	09/10/24	J		
1176.					Sold (part)	09/13/24	J		
1177.					Buy (add'l)	09/30/24	J		
1178.					Buy (add'l)	10/01/24	J		
1179.					Sold (part)	10/15/24	J		
1180.					Buy (add'l)	11/15/24	J		
1181.					Sold (part)	11/15/24	J		
1182.					Buy (add'l)	12/02/24	J		
1183.					Buy (add'l)	12/10/24	J		
1184.					Sold (part)	12/13/24	J		
1185.					Buy (add'l)	12/16/24	J		
1186.					Sold (part)	12/19/24	K		
1187.					Buy (add'l)	12/31/24	J		
1188. CITIBANK ASSET ACCOUNT		None	J	T					
1189. CITIBANK MONEY MARKET PLUS	F	Interest	P1	T					

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1190. CITIBANK INTEREST CHECKING ACCOUNT #2 (KATNH)	A	Interest			Closed	04/25/24	K		
1191. CITIBANK CHECKING ACCOUNT (KATNH #2)		None	J	T					
1192. CITIBANK CHECKING ACCOUNT (REV TR)	A	Interest	J	T					
1193. MORGAN STANLEY BANK/TRUST DEPOSITS #1(FKA #3)/CASH (ROTH IRA)		None			Closed	04/08/24	J		
1194. FDN BROKERAGE #1 AT GOLDMAN (NOTE 16 IN SECT VIII) (H)									
1195. ---JOHNSON & JOHNSON COMMON STOCK (DONATED TO FDN ON 12/5/2024) (X)		None			Sold	12/05/24	L	F	
1196. ---JOHNSON & JOHNSON COMMON STOCK (DONATED TO FDN ON 12/30/24) (X)		None			Sold	12/31/24	N	G	
1197. ---MICROSOFT INC COMMON STOCK (DONATED TO FDN ON 12/30/24) (X)		None			Sold	12/31/24	N	G	
1198. FDN BRKG ACCT #2 (NOTE 16 SECT VIII) (H)									
1199. ---MORGAN STANLEY BANK/TRUST #2 (CASH/MM) (804)	A	Interest			Closed	04/29/24	J		
1200. ---MORGAN STANLEY BANK/TRUST #3 (CASH/MM)(024)		None			Closed	04/08/24	J		
1201. COMMON STOCKS AND FUNDS (H)									
1202. ---ALPHABET INC COMMON STOCK	A	Dividend			Sold	06/24/24	M	F	
1203. ---AMAZON COM INC COMMON STOCK		None			Sold	06/24/24	M	F	
1204. ---APOLLO GLOBAL MANAGEMENT INC COMMON STOCK	B	Dividend			Sold	06/24/24	M	G	
1205. ---ARDAGH METAL PACKING COMMON STOCK		None			Sold	01/05/24	K		

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1206. ---ARTISAN INTL VALUE ADV FUND (APDKX)		None			Buy (add'l)	01/05/24	J		
1207.					Sold	05/21/24	L	D	
1208. ---BARON GROWTH INSTITUTIONAL FUND (BGRIX)		None			Buy (add'l)	01/05/24	J		
1209.					Sold	05/21/24	M	D	
1210. ---BNY MELLON GLB EMERG MKTS FUND (DGIEX)		None			Sold	05/21/24	K	C	
1211. ---FEDERATED HERMES GOVT OBL AVR MUTUAL FUND (GOVXX)(MMF)	C	Dividend			Sold (part)	01/05/24	K		
1212.					Sold	07/02/24	M		
1213. ---FIDELITY ADV ENERGY MUTUAL FUND (FANIX)		None			Buy (add'l)	01/05/24	K		
1214.					Sold	05/21/24	M	E	
1215. ---FIDELITY ADV HEALTH CARE MUTUAL FUND (FHCIX)		None			Sold	05/21/24	L	D	
1216. ---FRANKLIN INTL GROWTH ADV MUTUAL FUND (FNGZX)		None			Sold	01/23/24	L		
1217. ---GOLDMAN SACHS GQG INTL OPP FUND (GSIMX)		None			Sold	05/21/24	L	E	
1218. ---GQG PARTNERS EMRG MKTS EQ INS MTL FND (GQGIX)		None			Sold	05/21/24	M	E	
1219. ---HP WORLDQUANT - FOUNDERS ESC HDGE FUND		None	N	T					
1220. ---INVESCO S&P 500 GARP ETF (SPGP)	A	Dividend			Sold	05/21/24	M	E	
1221. ---ISHARES CORE S&P US GROWTH FUND (IUSG)	A	Dividend			Sold	05/21/24	M	F	
1222. ---ISHARES EDGE MSCI MIN VOL USA FUND (USMV)	A	Dividend			Sold	05/21/24	M	E	

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2. Value Codes (See Columns C1 and D3) J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1223. ---ISHARES EDGE MSCI US QLTY FAC FUND (QUAL)	A	Dividend			Sold	05/21/24	M	E	
1224. ---ISHARES EXP TECH SOFTWARE ETF (IGV)		None			Sold	05/21/24	M	E	
1225. ---ISHARES S&P 500 VAL ETF (IVE)	A	Dividend			Sold	05/21/24	M	E	
1226. ---ISHARES S&P MIDCAP 400 INDEX FUND (IJH)	A	Dividend			Buy (add'l)	01/05/24	J		
1227.					Sold	05/21/24	M	F	
1228. ---JPMORGAN CHASE & CO COMMON STOCK	B	Dividend			Sold	06/24/24	M	E	
1229. ---MICROSOFT CORP COMMON STOCK	A	Dividend			Sold	06/24/24	M	F	
1230. ---NEUBERGER INTRINSIC VALUE INST FUND (NINLX)		None			Buy (add'l)	01/05/24	J		
1231.					Sold	05/21/24	L		
1232. ---PROSHARES TR S&P 500 DV ARIST FUND (NOBL)	A	Dividend			Sold	05/21/24	M	E	
1233. ---UBER TECHNOLOGIES INC COMMON STOCK		None			Sold	06/24/24	M	G	
1234. ---UNITEDHEALTH GP INC COMMON STOCK	A	Dividend			Sold	06/24/24	L	E	
1235. ---VANGUARD INFO TECH ETF (VGT)	A	Dividend			Sold	05/21/24	M	E	
1236. ---VANGUARD S&P 500 ETF (VOO)	B	Dividend			Sold	05/21/24	O	G	
1237. ---VIRTUS KAR MID-CAP CORE FUND (VIMCX)		None			Buy (add'l)	01/05/24	J		
1238.					Sold	05/21/24	M	E	
1239. ---WARNER MUSIC GROUP CORP COMMON STOCK	A	Dividend			Sold	06/24/24	L		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1240. ---WCM FOCUSED INTERNATIONAL GROWTH FUND		None			Buy	01/23/24	L		
1241.					Sold	05/21/24	L	D	
1242. ---WISDOMTREE JAPAN EQUITY (DNL)	A	Dividend			Sold	05/21/24	L		
1243. ---WISDOMTREE TR US SMALLCAP FUND (EES)	A	Dividend			Buy (add'l)	01/05/24	J		
1244.					Sold	05/21/24	L	B	
1245. FDN BROKERAGE ACCOUNT #3 (NOTE 16 SECT VIII) (H)									
1246. ---MORGAN STANLEY DEPOSIT/CASH ACCOUNT #4 (FKA #3) (132)	A	Interest			Closed	04/08/24	J		
1247. ---APOLLO GLOBAL MGMT INC COMMON STOCK (COMBINED WITH LINE 1153 ABOVE)									
1248. ---AT&T INC COMMON STOCK	C	Dividend			Sold	06/24/24	L	D	
1249. ---BLACKSTONE INC COMMON STOCK	A	Dividend			Sold	06/24/24	L	E	
1250. ---CIVITAS RESOURCES INC COMMON STOCK	C	Dividend			Buy (add'l)	01/05/24	K		
1251.					Sold	06/24/24	L	E	
1252. ---CROWN CASTLE INC COMMON STOCK	B	Dividend			Sold	06/24/24	L		
1253. ---DIAMONDBACK ENERGY INC COMMON STOCK	C	Dividend			Buy (add'l)	01/05/24	K		
1254.					Sold	06/24/24	M	E	
1255. ---DIGITAL REALTY TRUST, INC	B	Dividend			Buy	01/17/24	K		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1256.					Buy (add'l)	02/02/24	K		
1257.					Buy (add'l)	02/07/24	K		
1258.					Buy (add'l)	02/13/24	K		
1259.					Sold	06/24/24	M	D	
1260. ---NEXTERA ENERGY INC COMMON STOCK	A	Dividend			Sold	06/24/24	L	E	
1261. ---SAFEHOLD INC COMMON STOCK	B	Dividend			Buy (add'l)	01/17/24	J		
1262.					Sold	06/24/24	L	D	
1263. ---ARES CAPITAL CORP STOCK (ARCC)	B	Dividend			Sold	06/24/24	K	C	
1264. ---BLACKSTONE SECURED LENDING FUND (BXSL)	B	Dividend			Sold (part)	01/05/24	K	E	
1265.					Sold	02/02/24	K	E	
1266. ---DOUBLELINE YIELD OPP FUND (DLY)	A	Dividend			Sold	05/21/24	K	B	
1267. ---FIRST TRUST SENIOR LOAN FUND	D	Dividend			Buy (add'l)	01/05/24	J		
1268.					Sold	05/21/24	M	D	
1269. ---GLOBAL X NASD 100 COV CALL FUND	C	Dividend			Sold	05/21/24	L	C	
1270. ---GOLUB CAPITAL BDC INC STOCK	B	Dividend			Sold	06/24/24	K	D	
1271. ---ISHARES FALLEN ANGELS ETF		None			Buy (add'l)	01/05/24	J		
1272.					Sold	01/17/24	M	G	

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1273. ---ISHARES IBOXX HY COR BD ETF	C	Dividend			Buy (add'l)	01/05/24	J		
1274.					Buy (add'l)	01/17/24	K		
1275.					Sold (part)	02/02/24	K	A	
1276.					Sold (part)	02/13/24	J		
1277.					Sold	05/21/24	M	D	
1278. ---VANGUARD INTERMEDIATE TERM COR FUND (VCIT)	B	Dividend			Buy (add'l)	01/05/24	J		
1279.					Sold	05/21/24	M	C	
1280. ---VANGUARD LONG-TERM CORPORATE (VCLT)	B	Dividend			Buy (add'l)	01/05/24	J		
1281.					Sold	05/21/24	L		
1282. ---FEDERATED HERMES GOVT OBL AVR FUND (GOVXX)(MMF)	A	Dividend			Sold (part)	01/05/24	M		
1283.					Sold (part)	01/09/24	J		
1284.					Buy (add'l)	01/25/24	K		
1285.					Sold (part)	02/02/24	K		
1286.					Sold (part)	02/07/24	K		
1287.					Sold	02/13/24	K		
1288. ---BRANDYWINE GLOBAL CORP CRD MUTUAL FUND	C	Dividend			Buy (add'l)	01/05/24	J		
1289.					Sold	05/21/24	M	D	

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1290. ---CALAMOS CONVERTIBLE FUND (CICVX)	A	Dividend			Sold	05/21/24	L	C	
1291. ---E V ADV FLOATING RATE MUTUAL FUND (EIFAX)	D	Dividend			Buy (add'l)	01/05/24	K		
1292.					Sold	05/21/24	M	C	
1293. ---FIDELITY ADV FLTG RT HI INC FUND (FFRIX)	D	Dividend			Buy (add'l)	01/05/24	K		
1294.					Sold	05/21/24	M	B	
1295. ---MAINSTAY MCKAY SHTDUR HGYD MUTUAL FUND (MDHIX)	C	Dividend			Buy (add'l)	01/05/24	J		
1296.					Sold	05/21/24	M	D	
1297. ---PIMCO MORTGAGE OPP & BD MUTUAL FUND (PMZPX)	D	Dividend			Buy (add'l)	01/05/24	J		
1298.					Buy (add'l)	02/02/24	L		
1299.					Sold	05/21/24	M		
1300. FOUNDATION BRKGE A/C #4 - BROWN ADVISORY/US BANK (009)(H)									
1301. ---FIRST AMERICAN GOVERNMENT OBLIG FUND CL Z MONEY MARKET FUND FGZXX	E	Dividend	N	T	Open	03/27/24	K		
1302.					Buy (add'l)	04/05/24	J		
1303.					Buy (add'l)	04/08/24	K		
1304.					Buy (add'l)	04/30/24	J		
1305.					Buy (add'l)	05/01/24	J		

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1306.					Buy (add'l)	05/02/24	J		
1307.					Buy (add'l)	05/06/24	J		
1308.					Buy (add'l)	05/07/24	J		
1309.					Buy (add'l)	05/22/24	P1		
1310.					Buy (add'l)	05/23/24	P1		
1311.					Sold (part)	05/24/24	P1		
1312.					Sold (part)	05/30/24	O		
1313.					Buy (add'l)	05/31/24	J		
1314.					Buy (add'l)	06/04/24	J		
1315.					Sold (part)	06/24/24	N		
1316.					Buy (add'l)	06/25/24	P1		
1317.					Buy (add'l)	06/26/24	M		
1318.					Sold (part)	06/26/24	P1		
1319.					Buy (add'l)	06/27/24	M		
1320.					Sold (part)	06/27/24	M		
1321.					Buy (add'l)	06/28/24	M		
1322.					Sold (part)	06/28/24	M		

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1323.					Buy (add'l)	07/01/24	M		
1324.					Sold (part)	07/01/24	M		
1325.					Buy (add'l)	07/02/24	M		
1326.					Sold (part)	07/02/24	M		
1327.					Buy (add'l)	07/03/24	J		
1328.					Sold (part)	07/19/24	J		
1329.					Buy (add'l)	08/02/24	J		
1330.					Buy (add'l)	08/05/24	J		
1331.					Buy (add'l)	08/15/24	L		
1332.					Buy (add'l)	09/04/24	J		
1333.					Buy (add'l)	10/02/24	J		
1334.					Sold (part)	10/04/24	M		
1335.					Sold (part)	10/18/24	J		
1336.					Buy (add'l)	11/04/24	J		
1337.					Buy (add'l)	11/06/24	J		
1338.					Buy (add'l)	11/14/24	L		
1339.					Buy (add'l)	12/03/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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1340.					Buy (add'l)	12/05/24	J		
1341.					Sold (part)	12/16/24	M		
1342.					Sold (part)	12/19/24	K		
1343.					Buy (add'l)	12/31/24	J		
1344. ---US TREASURIES (SEE NOTE 6 IN SECTION VIII)	C	Interest	L	T					
1345. ---ARTISAN HIGH INCOME FUND (APHFX)	D	Dividend	N	T	Buy	05/23/24	N		
1346. ---VOYA INTERMEDIATE BOND FUND (IICIX)	E	Dividend	O	T	Buy	05/23/24	O		
1347. ---DARLINGTON PARTNERS (TAX EXEMPT)		None	O	U	Buy	06/30/24	O		
1348. (INVESTS ACROSS ALL SECTORS & GEOGRAPHIES IN USA)									
1349. ---EGERTON INVESTMENT PARTNERS (SERIES 1 HEDGED)(NOTE 1 SECT VIII)	F	Distribution	P1	U	Buy	07/01/24	P1		
1350. ---BROWN ADVISORY FLEXIBLE EQUITY FUND	E	Dividend	O	T	Buy	05/23/24	O		
1351.					Buy (add'l)	12/16/24	K		
1352. ---BROWN ADVISORY SUSTAINABLE GROWTH FUND	E	Dividend	O	T	Buy	05/23/24	O		
1353.					Buy (add'l)	12/16/24	K		
1354. ---BROWN ADVISORY SUSTAINABLE VALUE FUND	E	Dividend	O	T	Buy	05/23/24	O		
1355.					Buy (add'l)	12/17/24	J		
1356. ---BROWN ADVISORY WMC JAPAN EQUITY FUND		None	M	T	Buy	10/03/24	M		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1357. ---BROWN ADVISORY PRIVATE EQUITY (SEE NOTE 15 IN SECT VIII)		None	K	U	Buy	12/19/24	K		
1358. (INVESTS IN HEALTHCARE, TECH & INDUSTRIAL)									
1359. ------ACCEL (X)		None	J	W					
1360. ------ALTAMONT (X)		None	J	W					
1361. ------ANDREESSEN HOROWITZ (X)		None	J	W					
1362. ------LINDEN CAPITAL PARTNERS (X)		None	J	W					
1363. ------STERLING GROUP PARTNERS (X)		None	J	W					
1364. ------THRIVE CAPITAL (X)		None	J	W					
1365. FOUNDATION BRKG ACCOUNT #5 - ACM (BROWN ADVISORY/US BANK) (H)									
1366. ---FIRST AMERICAN GOVERNMENT OBLIG FUND CL Z MONEY MARKET FUND FGZXX	C	Dividend	J	T	Open	05/30/24	O		
1367.					Sold (part)	06/03/24	N		
1368.					Sold (part)	06/14/24	J		
1369.					Sold (part)	06/24/24	M		
1370.					Buy (add'l)	06/25/24	M		
1371.					Sold (part)	07/01/24	M		
1372.					Buy (add'l)	07/02/24	J		

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1373.					Sold (part)	07/24/24	J		
1374.					Sold (part)	08/05/24	J		
1375.					Buy (add'l)	08/08/24	J		
1376.					Sold (part)	08/09/24	J		
1377.					Buy (add'l)	08/20/24	J		
1378.					Sold (part)	08/22/24	J		
1379.					Sold (part)	08/30/24	L		
1380.					Sold (part)	09/09/24	J		
1381.					Sold (part)	09/11/24	J		
1382.					Sold (part)	09/13/24	J		
1383.					Sold (part)	10/02/24	K		
1384.					Buy (add'l)	10/07/24	J		
1385.					Buy (add'l)	10/10/24	J		
1386.					Buy (add'l)	10/15/24	J		
1387.					Sold (part)	10/22/24	J		
1388.					Buy (add'l)	10/31/24	J		
1389.					Buy (add'l)	11/06/24	J		

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1390.					Sold (part)	11/06/24	J		
1391.					Buy (add'l)	11/07/24	J		
1392.					Sold (part)	11/20/24	J		
1393.					Sold (part)	11/21/24	J		
1394.					Sold (part)	11/22/24	J		
1395.					Sold (part)	12/06/24	J		
1396.					Sold (part)	12/10/24	J		
1397.					Buy (add'l)	12/13/24	J		
1398.					Buy (add'l)	12/19/24	J		
1399.					Buy (add'l)	12/23/24	J		
1400.					Sold (part)	12/31/24	J		
1401. ---AEROVIRONMENT, INC COMMON STOCK		None	K	T	Buy	05/31/24	K		
1402.					Buy (add'l)	06/28/24	J		
1403.					Buy (add'l)	08/29/24	J		
1404.					Buy (add'l)	10/01/24	J		
1405.					Sold (part)	10/30/24	J	A	
1406.					Sold (part)	11/05/24	J	A	

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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1407. ---ANSYS, INC COMMON STOCK		None			Buy	05/31/24	J		
1408.					Sold	12/12/24	J	A	
1409. ---ASPEN TECHNOLOGY, INC COMMON STOCK		None	J	T	Buy	05/31/24	J		
1410.					Buy (add'l)	06/28/24	J		
1411.					Buy (add'l)	08/29/24	J		
1412. ---AZENTA INC COMMON STOCK		None	J	T	Buy	05/31/24	J		
1413.					Buy (add'l)	06/28/24	J		
1414.					Buy (add'l)	11/05/24	J		
1415. ---BIO-TECHNE CORP COMMON STOCK	A	Dividend	K	T	Buy	05/31/24	J		
1416.					Buy (add'l)	06/28/24	J		
1417.					Buy (add'l)	08/29/24	J		
1418.					Buy (add'l)	10/01/24	J		
1419.					Buy (add'l)	11/20/24	J		
1420. ---BLACKBAUD, INC COMMON STOCK		None	J	T	Buy	05/31/24	J		
1421.					Buy (add'l)	06/28/24	J		
1422.					Buy (add'l)	08/29/24	J		
1423.					Sold (part)	11/06/24	J		

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1424. ---CERENCE, INC COMMON STOCK		None	K	T	Buy	05/31/24	J		
1425.					Buy (add'l)	06/28/24	J		
1426.					Buy (add'l)	08/29/24	J		
1427. ---COGNEX CORP COMMON STOCK	A	Dividend	J	T	Buy	05/31/24	J		
1428.					Buy (add'l)	06/28/24	J		
1429.					Buy (add'l)	08/29/24	J		
1430.					Sold (part)	12/17/24	J		
1431.					Sold (part)	12/18/24	J		
1432. ---COGNYTE SOFTWARE, LTD COMMON STOCK		None	K	T	Buy	05/31/24	J		
1433.					Buy (add'l)	06/28/24	J		
1434.					Buy (add'l)	08/29/24	J		
1435.					Buy (add'l)	10/01/24	J		
1436.					Buy (add'l)	11/21/24	J		
1437. ---COMMVAULT SYSTEMS, INC COMMON STOCK		None	K	T	Buy	05/31/24	J		
1438.					Buy (add'l)	06/28/24	J		
1439.					Buy (add'l)	08/29/24	J		
1440.					Buy (add'l)	10/01/24	J		

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1441. ---COSTAR GROUP, INC COMMON STOCK		None	K	T	Buy	05/31/24	J		
1442.					Buy (add'l)	06/28/24	J		
1443.					Buy (add'l)	08/29/24	J		
1444.					Buy (add'l)	10/01/24	J		
1445.					Buy (add'l)	10/11/24	J		
1446. ---CYBERARK SOFTWARE, LTD COMMON STOCK		None	L	T	Buy	05/31/24	K		
1447.					Buy (add'l)	06/28/24	J		
1448.					Sold (part)	08/19/24	J	A	
1449.					Buy (add'l)	08/29/24	J		
1450.					Buy (add'l)	10/01/24	J		
1451. ---DEXCOM, INC COMMON STOCK		None	J	T	Buy	05/31/24	J		
1452.					Buy (add'l)	06/28/24	J		
1453.					Buy (add'l)	08/29/24	J		
1454. ---FACTSET RESEARCH SYSTEMS, INC COMMON STOCK	A	Dividend	K	T	Buy	05/31/24	J		
1455.					Buy (add'l)	06/28/24	J		
1456.					Buy (add'l)	08/29/24	J		
1457.					Buy (add'l)	10/01/24	J		

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1458. ---FORTINET, INC COMMON STOCK		None	K	T	Buy	05/31/24	J		
1459.					Buy (add'l)	06/28/24	J		
1460.					Sold (part)	08/07/24	J	A	
1461. ---GENTEX CORP COMMON STOCK	A	Dividend	J	T	Buy	05/31/24	J		
1462.					Buy (add'l)	06/28/24	J		
1463.					Buy (add'l)	08/29/24	J		
1464. ---GUIDEWIRE SOFTWARE, INC COMMON STOCK		None	K	T	Buy	05/31/24	J		
1465.					Buy (add'l)	06/28/24	J		
1466.					Buy (add'l)	08/29/24	J		
1467.					Buy (add'l)	10/01/24	J		
1468. ---IDEXX LABORATORIES, INC COMMON STOCK		None	K	T	Buy	05/31/24	J		
1469.					Buy (add'l)	06/28/24	J		
1470. ---JACK HENRY & ASSOCIATES, INC COMMON STOCK	A	Dividend	K	T	Buy	05/31/24	J		
1471.					Buy (add'l)	06/28/24	J		
1472.					Buy (add'l)	08/29/24	J		
1473.					Buy (add'l)	10/01/24	J		
1474. ---KORNIT DIGITAL, LTD COMMON STOCK		None	J	T	Buy	05/31/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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Name of Person Reporting	Date of Report
Wood, Kimba M.	10/06/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1475.					Buy (add'l)	06/28/24	J		
1476.					Buy (add'l)	08/29/24	J		
1477.					Sold (part)	11/06/24	J	A	
1478.					Sold (part)	12/20/24	J	A	
1479. ---KRATOS DEFENSE & SECURITY SOLUTIONS, INC COMMON STOCK		None	J	T	Buy	05/31/24	J		
1480.					Buy (add'l)	06/28/24	J		
1481.					Buy (add'l)	08/02/24	J		
1482.					Buy (add'l)	08/08/24	J		
1483.					Buy (add'l)	09/06/24	J		
1484. ---LIVERAMP HOLIDNGS, INC COMMON STOCK		None	J	T	Buy	05/31/24	J		
1485.					Buy (add'l)	06/28/24	J		
1486.					Buy (add'l)	07/23/24	J		
1487.					Buy (add'l)	08/29/24	J		
1488.					Sold (part)	10/11/24	J		
1489. ---MANHATTAN ASSOCIATES, INC COMMON STOCK		None	K	T	Buy	05/31/24	J		
1490.					Buy (add'l)	06/28/24	J		
1491.					Buy (add'l)	08/29/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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1492.					Sold (part)	10/09/24	J	A	
1493. ---MEDPACE HOLDINGS, INC COMMON STOCK		None	K	T	Buy	05/31/24	K		
1494.					Buy (add'l)	06/28/24	J		
1495.					Buy (add'l)	08/29/24	J		
1496.					Buy (add'l)	10/01/24	J		
1497. ---MORNINGSTAR, INC COMMON STOCK	A	Dividend	K	T	Buy	05/31/24	J		
1498.					Buy (add'l)	06/28/24	J		
1499.					Buy (add'l)	08/29/24	J		
1500.					Buy (add'l)	10/01/24	J		
1501. ---NCINO OPCO, INC COMMON STOCK		None	J	T	Buy	09/12/24	J		
1502.					Buy (add'l)	10/11/24	J		
1503.					Buy (add'l)	12/05/24	J		
1504. ---NEOGEN CORP COMMON STOCK		None	J	T	Buy	05/31/24	J		
1505.					Buy (add'l)	06/28/24	J		
1506.					Buy (add'l)	08/29/24	J		
1507.					Buy (add'l)	09/06/24	J		
1508.					Buy (add'l)	09/10/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1509.					Buy (add'l)	12/06/24	J		
1510.					Buy (add'l)	12/17/24	J		
1511. ---NICE, LTD COMMON STOCK		None	K	T	Buy	05/31/24	J		
1512.					Buy (add'l)	06/28/24	J		
1513.					Buy (add'l)	08/29/24	J		
1514.					Buy (add'l)	10/01/24	J		
1515. ---PAYCOM SOFTWARE, INC COMMON STOCK	A	Dividend	J	T	Buy	05/31/24	J		
1516.					Buy (add'l)	06/28/24	J		
1517.					Buy (add'l)	08/02/24	J		
1518.					Buy (add'l)	08/29/24	J		
1519.					Sold (part)	12/17/24	J	A	
1520. ---QUALYS, INC COMMON STOCK		None	K	T	Buy	05/31/24	J		
1521.					Buy (add'l)	06/28/24	J		
1522.					Buy (add'l)	08/29/24	J		
1523.					Buy (add'l)	10/01/24	J		
1524.					Sold (part)	10/04/24	J		
1525. ---RBC BEARINGS, INC COMMON STOCK		None	K	T	Buy	05/31/24	J		

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1526.					Buy (add'l)	06/28/24	J		
1527.					Buy (add'l)	08/29/24	J		
1528.					Buy (add'l)	10/01/24	J		
1529. ---REPLIGEN CORP COMMON STOCK		None	K	T	Buy	05/31/24	J		
1530.					Buy (add'l)	06/13/24	J		
1531.					Buy (add'l)	06/28/24	J		
1532.					Buy (add'l)	08/29/24	J		
1533.					Buy (add'l)	10/01/24	J		
1534.					Buy (add'l)	11/20/24	J		
1535. ---RESMED, INC COMMON STOCK	A	Dividend	K	T	Buy	05/31/24	J		
1536.					Buy (add'l)	06/28/24	J		
1537.					Buy (add'l)	08/29/24	J		
1538.					Buy (add'l)	10/01/24	J		
1539. ---SEI INVESTMENTS CO COMMON STOCK		None	J	T	Buy	11/19/24	J		
1540. ---SPS COMMERCE, INC COMMON STOCK		None	J	T	Buy	05/31/24	J		
1541.					Buy (add'l)	06/28/24	J		
1542.					Buy (add'l)	08/29/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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1543. ---STAAR SURGICAL COMPANY COMMON STOCK		None	J	T	Buy	05/31/24	J		
1544.					Buy (add'l)	06/28/24	J		
1545.					Buy (add'l)	08/29/24	J		
1546.					Buy (add'l)	09/06/24	J		
1547.					Buy (add'l)	10/21/24	J		
1548.					Buy (add'l)	12/17/24	J		
1549. ---TRADEWEB MARKETS INC COMMON STOCK	A	Dividend	J	T	Buy	05/31/24	J		
1550.					Buy (add'l)	06/28/24	J		
1551.					Buy (add'l)	08/29/24	J		
1552.					Buy (add'l)	10/01/24	J		
1553.					Sold (part)	10/30/24	J	A	
1554. ---TREX CO, INC COMMON STOCK		None	J	T	Buy	11/19/24	J		
1555. ---VARONIS SYSTEMS, INC COMMON STOCK		None	J	T	Buy	12/12/24	J		
1556.					Buy (add'l)	12/30/24	J		
1557. ---VEEVA SYSTEMS, INC COMMON STOCK		None	J	T	Buy	05/31/24	J		
1558.					Buy (add'l)	06/28/24	J		
1559.					Buy (add'l)	08/29/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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1560. NON-PUBLICS (NOTES 5 & 7 SECT VIII) (H)									
1561. ELGIN CAPITAL (SEE NOTE 9 IN SECT VIII)	C	Distribution	L	U					
1562. ---BAYSWATER ELGIN NATL RESOURCES FUND III (OWNS OIL AND GAS PPTY)		None	L	W					
1563. ENTERTAINMENT ACQUISITION CO (SEE NOTES 1 & 11 IN SECT VIII)	B	Distribution							
1564. CENTERBRIDGE CREDIT PARTNERS (SEE NOTES 9 & 18 IN SECT VIII)		None	K	U	Distributed (part)	01/31/24	J		
1565.					Distributed (part)	04/30/24	J		
1566.					Distributed (part)	07/30/24	J		
1567. ---NORTH AMERICAN BANK DEBT SECURITIES (Y)									
1568. ---EUROPE BANK DEBT SECURITIES (Y)									
1569. ---NORTH AMERICA CORP/GOVT BONDS (Y)									
1570. ---NORTH AMERICA PRIVATE EQUITY (Y)									
1571. ---EUROPE EQUITY SECURITIES (GARRETT MOTION INC) (Y)									
1572. ---NORTH AMERICA TRADE CLAIMS (Y)									
1573. ---NORTH AMERICA AFFILIATED ENTITIES (Y)									
1574. ---EUROPE AFFILIATED ENTITIES (Y)									
1575. ---FUNDAMENTAL INNOVATION SYSTEMS INTERNATIONAL, LLC (X)		None	J	W					

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	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1576. ---CASCADE FINANCIAL HOLDINGS LLC (X)		None	J	W					
1577. IPC/UHS COINV PARTNERS (SEE NOTE 11 IN SECT VIII)	D	Distribution			Distributed	04/04/24	J		
1578. TAMPA BAY RAYS/ROWDIES (SEE NOTE 1 IN SECT VIII)	H1	Distribution			Sold	09/16/24	P2		
1579. OFFIT CAPITAL ADVISORS (SEE NOTE 1 IN SECTION VIII)	E	Distribution	L	W	Distributed (part)	11/14/24	K		
1580. SUMMERFIELD ROTOR HSI (SEE NOTE 1 IN SECT VIII)		None	N	W					
1581. BLACKSTONE REAL ESTATE PRTNRS VI & VIII (NOTE 9 IN SEC VIII)	F	Distribution	P1	U					
1582. ---HILTON HAWAIIAN (SOLD IN 2023-FINAL CASH RESERVES DISTRIBUTED)		None			Distributed	12/13/24	J		
1583. ---MANYATA BUSINESS PARK		None			Sold	01/31/24	K		
1584. ---QUADRON BUSINESS PARK		None			Sold	01/31/24	K		
1585. ---ONE YORK STREET		None	J	U					
1586. ---3880 N MISSION (Y)									
1587. ---ALL STAR MILAN OFFICE PORTFOLIO		None	J	U	Sold (part)	06/04/24	J		
1588. ---ALPHA PORTFOLIO	A	Int./Div.	J	U	Sold (part)	09/10/24	J		
1589. ---AMERSTERDAM OFFICE PORTFOLIO		None	J	U					
1590. ---ANANTERA MALDIVES		None	J	U					
1591. ---AXEL SPRINGER		None	J	U					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Wood, Kimba M.	10/06/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1592. ---BANKIA SPANISH NON-PERFORMING LOAN PORTFOLIO		None	J	U					
1593. ---BIOMED REALTY TRUST (SEE NOTE 11 IN SECT VIII)		None			Distributed	06/04/24	J		
1594. ---CAMELOT LOGISTICS		None	J	U					
1595. ---CAULFIELD VILLAGE		None	J	U					
1596. ---CHANGSHU LOGISTICS PARK (Y)									
1597. ---CHAPELLE OFFICE COMPLEX (Y)									
1598. ---CONRAD MALDIVES		None	J	U					
1599. ---COPENHAGEN RESIDENTIAL		None	J	U					
1600. ---COPENHAGEN RESIDENTIAL II		None	J	U					
1601. ---COPENHAGEN RESIDENTIAL III		None	J	U					
1602. ---COVIVIO ITALIAN OFFICE PORTFOLIO		None	J	U					
1603. ---CROESUS RETAIL TRUST		None	J	U					
1604. ---DEPOT PARK		None	J	U					
1605. ---EAST COAST LOGISTICS		None	J	U					
1606. ---ELANTE	A	Int./Div.	J	U	Sold (part)	09/10/24	J		
1607. ---ELARA LAS VEGAS TIME SHARES		None	K	U	Sold (part)	09/10/24	J		
1608.					Sold (part)	12/06/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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1609. ---EMPIRE SPANISH RESIDENTIAL PORTFOLIO		None	J	U					
1610. ---ENCORE		None	L	U					
1611. ---ESPLANADE MALL (Y)									
1612. ---EUROPEAN BIG BOX LOGISTICS		None	J	U					
1613. ---FIST INTERNATIONAL FINANCE CENTER		None			Sold	03/05/24	J		
1614. ---FIRST PRIORITY DONGGUEN LOGISTICS		None	J	U					
1615. ---FOXTROT INDL PORTFOLIO		None	K	U					
1616. ---GALLOP AUSTRALIAN LOGISTICS PORTFOLIO		None	J	U					
1617. ---GE CAPITAL REAL ESTATE		None	J	U	Sold (part)	12/06/24	J		
1618. ---GLOBAL SOURCES		None	J	U					
1619. ---GRAMERCY PROPERTY TRUST		None	M	U					
1620. ---GREYSTAR MULTIFAMILY PORTFOLIO		None	K	U					
1621. ---HILTON RIO		None			Sold	09/10/24	K		
1622. ---HIRANANDANI LOGISTICS		None	J	U					
1623. ---HISPANIA (NOW INCLUDED WITH SPANISH RESORTS BELOW)									
1624. ---HOUSTON MULTIFAMILY PORTFOLIO		None			Sold	06/04/24	J		
1625. ---HYDRA WEST COAST OFFICE PORTFOLIO (Y)									

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1626. ---ICC		None	J	U					
1627. ---ICONIC RESORTS PORTFOLIO		None	M	U	Sold (part)	06/04/24	K		
1628.					Sold (part)	09/10/24	J		
1629. ---IMMOFINANZ LOGISTICS (SEE NOTE 11 IN SECT VIII)		None			Distributed	03/05/24	J		
1630. ---INDIABULLS PORTFOLIO		None	K	U					
1631. ---INDIABULLS GURGAON OFFICE PORTFOLIO		None	J	U					
1632. ---ANDMORE		None	L	U					
1633. ---JUPITER INDUSTRIAL PORTFOLIO		None	N	U	Sold (part)	06/04/24	J		
1634.					Distributed (part)	09/10/24	J		
1635.					Distributed (part)	09/26/24	K		
1636. ---KAPOLEI LOFTS MULTIFAMILY		None	J	U					
1637. ---KENWOOD MULTIFAMILY		None	J	U					
1638. ---KNIGHT SENIOR HOUSING PORTFOLIO		None	K	U	Buy (add'l)	11/18/24	K		
1639. ---KRYALOS STAKE	A	Int./Div.	J	U					
1640. ---L&T MUMBAI OFFICE PORTFOLIO	A	Int./Div.	J	U					
1641. ---LEO II RETAIL PORTFOLIO		None	K	U					
1642. ---MG PROPERTIES MULTIFAMILY		None	J	U					

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1643. ---MANHATTAN MULTIFAMILY PORTFOLIO-WORTHLESS AT END OF 2024		None			Buy (add'l)	06/13/24	J		
1644. ---METROPOLITAN SQUARE (Y)									
1645. ---LINE NOT USED.									
1646. ---MOTOR ACCIDENT COMMISSION PORTFOLIO		None	J	U					
1647. ---OBERBAUM CITY		None	J	U	Buy (add'l)	06/13/24	J		
1648. ---OBLIGO	A	Int./Div.	J	U					
1649. ---OFFICEFIRST PORTFOLIO		None	J	U					
1650. ---OFFICE GROUP		None	K	U					
1651. ---OMEGA INDUSTRIAL PORTFOLIO		None	K	U					
1652. ---ONE BKC		None	J	U					
1653. ---ONE INDIABULLS PARK		None	J	U					
1654. ---ORIX RESIDENTIAL	A	Int./Div.	J	U					
1655. ---PEAK MULTIFAMILY PORTFOLIO		None	J	U					
1656. ---PLD NATIONAL INDUSTRIAL PORTFOLIO		None	K	U					
1657. ---POPULAR SPANISH DEVELOPER LOAN PRTF		None	J	U					
1658. ---RMF INDUSTRIAL PORTFOLIO		None	J	U	Sold (part)	09/10/24	J		

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1659. ---RIOCAN US GROCERY ANCHORED POWER CENTER		None			Sold	03/05/24	K		
1660. ---RITZ CARLTON KAPALUA		None	K	U					
1661. ---ROOK SENIOR HOUSING PORTFOLIO		None	K	U	Buy (add'l)	11/18/24	J		
1662. ---SAGE HOUSING PORTFOLIO		None	K	U					
1663. ---SALARPURIA BUSINESS PARK		None	K	U					
1664. ---SANTANDAR/POPULAR JV		None	K	U	Buy (add'l)	03/18/24	J		
1665. ---SCENTRE OFFICE PORTFOLIO		None	J	U					
1666. ---SEAWOODS	A	Int./Div.	J	U	Sold (part)	09/10/24	J		
1667. ---SELECT SERVICE HOTEL PORTFOLIO (Y)									
1668. ---SHANGHAI SONGJIANG LOGISTICS		None	J	U					
1669. ---SODERMALM OFFICE		None	J	U					
1670. ---SPACE CENTER INDUSTRIAL PORTFOLIO		None	N	U	Sold (part)	06/04/24	J		
1671.					Sold (part)	09/10/24	J		
1672. ---SPANISH BIG BOX LOGISTICS PORTFOLIO		None	J	U					
1673. ---SPANISH RESORTS (FKA SPANISH HOTELS (HIP) AND HISPANIA)		None	L	U					
1674. ---SPONDA PLC		None	K	U	Buy (add'l)	06/13/24	J		
1675. ---STEIGENBERGER HOTEL		None	J	U					

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1676. ---STRATEGIC HOTELS & RESORTS	A	Int./Div.	L	U					
1677. ---SUMMER HOUSE MULTIFAMILY		None	J	U					
1678. ---TARRACO TOWER (Y)									
1679. ---TESTA SPANISH MULTIFAMILY PORTFOLIO		None	L	U					
1680. ---TITAN INDUSTRIAL PORTFOLIO		None	L	U					
1681. ---TOURMALET PORTFOLIO		None	J	U					
1682. ---TREPTOWERS		None	J	U	Buy (add'l)	03/18/24	J		
1683. ---TSEUNG KWAN O HONG KONG RETAIL		None	J	U					
1684. ---TURTLE BAY RESORT		None	J	U	Sold (part)	09/10/24	K		
1685.					Distributed (part)	12/06/24	J		
1686. ---TYSAN HOLDINGS		None	J	U					
1687. ---VIRTUS ITALIAN OFFICE PORTFOLIO		None	J	U					
1688. ---WEST CORE INDUSTRIAL		None	L	U					
1689. ---WESTEND MALL (Y)									
1690. ---WESTGATE CENTER		None	J	U					
1691. ---WESTLINK SHANGHAI BUSINESS PARK		None	J	U					
1692. CENTERVIEW CAPITAL-TERMINATED IN 2024 (SEE NOTE 9 IN SECT VIII)		None							

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1693. ---ADVANTAGE SALES MARKETING		None			Sold	04/26/24	L		
1694. CS VENTURE PARTNERS (SEE NOTES 9 & 26 IN SECT VIII)	D	Distribution	P1	U	Buy (add'l)	09/05/24	L		
1695.					Buy (add'l)	12/19/24	L		
1696. ---AMORPHOLOGY		None	L	U	Buy (add'l)	09/04/24	J		
1697. ---ANDROS		None	M	U					
1698. ---AVVIO (FKA APPLAUD MEDICAL)		None	M	U	Buy (add'l)	10/15/24	K		
1699. ---BEHAVIORAL SIGNALS		None	K	U					
1700. ---FLASHPOINT THERAPEUTICS		None	L	U					
1701. ---GURU WIRELESS		None	M	U					
1702. ---KAIROS VENTURE PARTNERS (X)		None	M	U					
1703. ---MATTIQ		None	L	U	Buy (add'l)	12/12/24	L		
1704. ---NVASC		None	J	U					
1705. ---PATIENT DISCOVERY		None	M	U	Buy (add'l)	06/14/24	K		
1706. ---PTERODYNAMICS		None	L	U	Buy	05/21/24	K		
1707. ---SPECTER AEROSPACE		None	L	U	Buy (add'l)	03/27/24	J		
1708.					Buy (add'l)	11/12/24	K		
1709. ---VIVODYNE		None	N	U					

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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1710. DGNL VENTURES (SEE NOTE 9 IN SECT VIII)	B	Distribution	N	U					
1711. ---305 FITNESS		None	J	W					
1712. ---BANZA		None	K	W					
1713. ---FEKKAI RETAIL (BLUE MISTRAL)		None	J	W					
1714. ---HAILY		None	J	W					
1715. ---ICELANDIC PROVISIONS		None	K	W					
1716. ---JUST GOODS		None	K	W					
1717. ---KAMPS USA		None	J	W					
1718. ---MOON JUICE VENTURES		None	J	W					
1719. ---SWOON BRANDS		None	J	W					
1720. ---WRII (THE WELL) (Y)									
1721. ---BOCKS		None	K	W					
1722. ---CREATORIQ		None	K	W					
1723. ---JAWBONE HEALTHCARE HUB		None	J	W					
1724. ---JUDY PREP		None	J	W					
1725. ---MAGIC SPOON		None	K	W					
1726. ---MAVEN CLINIC		None	L	W					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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1727. ---MSE LADDER INVEST CO		None	J	W					
1728. ---PATTERN HOME		None	J	W					
1729. ---QUIP NYC		None	J	W					
1730. ---SARAH FLINT (Y)									
1731. ---THE RIVETER		None	J	W					
1732. ---TROVE RECOMMERCE		None	J	W					
1733. ---WANDER BEAUTY		None	J	W					
1734. ---CASH HELD AT CITY NATIONAL BANK (SEE NOTE 20 IN SECTION VIII)		None	J	T					
1735. ELGIN CAPITAL PARTNERS II (SEE NOTE 9 IN SECT VIII)	G	Distribution	P1	U					
1736. ---BAYSWATER ELGIN NATL RESOURCES FUND III (OIL AND GAS PPTY)		None	P1	W	Distributed (part)	03/28/24	K		
1737.					Distributed (part)	06/28/24	K		
1738.					Distributed (part)	08/22/24	K		
1739. FIRST NECK SELF STORAGE LP (SEE NOTE 9 IN SECT VIII)		None	N	U	Distributed (part)	01/16/24	J		
1740.					Distributed (part)	02/15/24	J		
1741.					Distributed (part)	03/15/24	J		
1742.					Distributed (part)	04/22/24	J		

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1743.					Distributed (part)	05/16/24	J		
1744.					Distributed (part)	06/14/24	J		
1745.					Distributed (part)	07/17/24	J		
1746.					Distributed (part)	08/19/24	J		
1747.					Distributed (part)	09/19/24	J		
1748.					Distributed (part)	10/11/24	J		
1749.					Distributed (part)	11/19/24	J		
1750.					Distributed (part)	12/17/24	J		
1751. ---FIRST NECK LR STORAGE (X)		None	K	W					
1752. ---FIRST NECK LR 10TH STREET		None	K	W					
1753. ---FIRST NECK PARKLAND		None	K	W					
1754. ---FIRST NECK VINELAND PROPERTY		None	M	W					
1755. ---1ST NECK UNIVERSITY AVE		None	K	W					
1756. ---FIRST NECK SOUTH CRESCENT		None	L	W					
1757. ---FIRST NECK ISLAND AVENUE		None	K	W					
1758. ---FIRST NECK PEMBROKE PINES		None	L	W					
1759. ---FIRST NECK SOUTH MACEDO		None	K	W					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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1760. ---FIRST NECK GEYER & LEON (Y)									
1761. ---FIRST NECK OTHER NET ASSETS (X)		None	J	W					
1762. GEMSPRING CAPITAL (SEE NOTE 9 IN SECTION VIII)	F	Distribution	O	U	Distributed (part)	11/05/24	L		
1763. ---A10 CAPITAL		None	N	W					
1764. ---BOBIT BUSINESS MEDIA (Y)									
1765. ---CFORIA SOFTWARE		None			Sold	03/14/24	J		
1766. ---CRAFTY APES-GEMSPRING DEEMED CO WORTHLESS AT 12/31/24		None			Buy (add'l)	11/05/24	K		
1767. ---INSURVIA		None			Sold	03/14/24	O		
1768. ---RADANCY		None	N	W					
1769. ---RAPID DISPLAYS (Y)									
1770. ---SHRIEVE CHEMICAL		None			Sold	11/05/24	P1		
1771. ---SKYLINE DISPLAYS		None	M	W					
1772. ---UNITED GROUP PROGRAMS		None	K	W					
1773. ---VALANT (SEE NOTE 11 IN SECTION VIII)					Distributed	03/14/24	J		
1774. GEMSPRING GOLIATH (SEE NOTE 9 IN SECTION VIII)		None	P1	U					
1775. ---SHRIEVE CHEMICAL		None	P1	W	Buy	11/05/24	P1		
1776. HIGHCAPE PARTNERS (SEE NOTE 9 IN SECT VIII)		None	N	U					

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1777. ---ELUTIA, INC (FKA AZIYO BIOLOGICS)		None	N	W					
1778. KAYNE ANDERSON-TERMINATED IN 2024 (SEE NOTE 9 IN SECT VIII)		None							
1779. ---MEDICAL PROPERTIES I JV, LLC		None			Sold	10/11/24	K		
1780. KITCHEN FUND (SEE NOTE 9 IN SECT VIII)		None	N	U					
1781. ---SWEETGREEN		None			Sold	05/24/24	L		
1782. ---39N EEGEE'S INVESTORS (SEE NOTE 14 IN SECTION VIII)		None							
1783. ---CURRY UP NOW		None	L	W					
1784. ---INDAY HOLDINGS		None	J	W					
1785. ---SORTIS HOLDINGS		None	L	W					
1786. ---THE HUMMUS & PITA COMPANY		None	K	W					
1787. ---THE PIE HOLE (SEE NOTE 14 IN SECTION VIII)		None							
1788. ---GOOD KARMA HOSPITALITY (FKA VEGAN EATS GROUP) (NOTE 14 SECT VIII)		None	J	W					
1789. ---CASH HELD AT JP MORGAN CHASE (X)		None	J	T					
1790. VESTAR CAP/ASSOC V (NOTE 11 SECT VIII)(PARTNERSHIP WOUND DOWN)		None			Distributed	01/25/24	J		
1791. VESTAR ASSOC VI (NOTE 12 IN SECT VIII)	D	Distribution			Distributed	08/13/24	J		
1792. RAZOR'S EDGE FUND (SEE NOTE 9 IN SECT VIII)		None	M	U					

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1793. ---GOSECURE		None	M	W					
1794. ---MERSIVE PLATFORM		None	K	W					
1795. RAZOR'S EDGE FUND II (SEE NOTE 9 IN SECT VIII)	A	Distribution	P1	U	Buy (add'l)	03/25/24	K		
1796.					Buy (add'l)	08/05/24	K		
1797. ---3DEO		None	L	W					
1798. ---ALTAMIRA PARENT HOLDINGS		None	L	W					
1799. ---AUTHENTIC8		None	M	W					
1800. ---HAWKEYE 360		None	O	W					
1801. ---PROSCIA		None	M	W					
1802. ---RACKTOP SYSTEMS		None	M	W					
1803. ---URSA SPACE SYSTEMS		None	K	W					
1804. ---VEROS HOLDINGS		None	M	W					
1805. SENTINEL CAPITAL CONTINUATION FUND (SEE NOTE 10 IN SECT VIII)		None	N	W					
1806. ---APEX COMPANIES		None	M	W					
1807. ---CORPORATE VISIONS		None	K	W					
1808. ---123DENTIST		None	M	W					
1809. ---MOBILE COMMUNICATIONS		None	M	W					

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1810. SENTINEL CAPITAL V, VI AND VII (SEE NOTE 10 IN SECT VIII)	G	Distribution	P2	W					
1811. ---CABI HOLDING (WRITTEN OFF AT YEAR-END) (Y)									
1812. ---ALTIMA DENTAL (SEE NOTE 11 IN SECT VIII)		None			Distributed	06/24/24	J		
1813. ---AMWEST (DEEMED WORTHLESS AS OF 12/31/2024) (Y)									
1814. ---BANDON HOLDINGS		None	O	W					
1815. ---CAPTAIN D'S (SEE NOTE 11 IN SECT VIII)		None			Distributed	03/19/24	J		
1816. ---CLS MANAGEMNET SERSVICES		None	N	W	Buy	04/11/24	N		
1817. ---EMPIRE AUTO		None	P1	W					
1818. ---HIGH BAR BRANDS		None	N	W	Buy	01/24/24	N		
1819. ---HOLLEY (FKA DRIVEN PERF BRANDS)		None	N	W					
1820. ---L2 BRANDS		None	L	W					
1821. ---MARKET PERFORMANCE GROUP		None	O	W	Buy	01/24/24	O		
1822. ---MIDWEST EYE (DBA BRIDGEVIEW EYE)		None	O	W					
1823. ---MOBILE COMMUNICATIONS		None	N	W					
1824. ---NEKOOSA (SEE NOTE 11 IN SECT VIII)		None			Distributed	03/19/24	J		
1825. ---NEW ERA TECHNOLOGIES		None	K	W					
1826. ---ONLINE LABELS GROUP		None	N	W	Buy	01/24/24	N		

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1827. ---RECREATIONAL GROUP		None	P1	W					
1828. ---REFRIGIWEAR		None	O	W					
1829. ---REVENEW INTERNATIONAL		None	O	W	Distributed (part)	03/19/24	K		
1830.					Distributed (part)	06/24/24	J		
1831. ---NEW YOU BARIATRIC		None	J	W	Buy (add'l)	08/08/24	K		
1832. ---SMARTSIGN		None	O	W					
1833. ---SPECTRUM SAFETY		None	P1	W	Buy	07/22/24	P1		
1834.					Buy (add'l)	08/08/24	O		
1835. ---SPL		None	O	W					
1836. ---TOTAL MILITARY MANAGEMENT		None	O	W					
1837. ---TRANSYSTEMS		None			Sold	08/08/24	P1		
1838. ---TRIMECH		None	O	W					
1839. ---TTG IMAGING		None	K	T					
1840. ---UBEO		None	O	W	Distributed (part)	03/19/24	J		
1841.					Distributed (part)	06/24/24	L		
1842. STREAMDATA LP (SEE NOTE 9 IN SECT VIII)		None	M	W	Buy	06/10/24	M		
1843. (DEVELOPMENT AND OPERATION OF TURNKEY DATA CENTERS)					Buy (add'l)	12/02/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1844. ---SDC CHICAGO		None	M	W	Buy	06/10/24	M		
1845. ---SDC DALLAS FORT WORTH		None	L	W	Buy	06/10/24	K		
1846.					Buy (add'l)	12/02/24	K		
1847. ---SDC PHOENIX		None	J	W	Buy	06/10/24	J		
1848.					Buy (add'l)	12/02/24	J		
1849. ---SDC SAN ANTONIO		None	J	W	Buy	06/10/24	J		
1850.					Buy (add'l)	12/02/24	J		
1851. TINICUM LP (SEE NOTE 9 IN SECT VIII)	F	Distribution	P1	W	Distributed (part)	05/09/24	J		
1852. (FUND MANAGES A DIVERSIFIED GROUP OF MANUFACTURING, DISTRIBUTION,					Buy (add'l)	05/22/24	J		
1853. TECH & INFRASTRUCTURE COS)					Distributed (part)	05/22/24	J		
1854.					Distributed (part)	08/29/24	J		
1855. ---KENNAMETAL COMMON STOCK	D	Dividend			Sold	08/29/24	J		
1856. ---US PRIVATE INDUSTRIAL (X)		None	N	W					
1857. ---STS METALS, INC		None	N	W					
1858. ---TSL ENGINEERED PRODUCTS		None	P1	W					
1859. ---WATLOW ELECTRIC MFG		None	P1	W					

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1860. ---PEM HOLDING CO (Y)									
1861. ---TINICUM ENGINEERED SYSTEMS		None	M	W					
1862. ---ASTRODYNE TDI, LLC		None	N	W					
1863. ---INCONEL HOLDINGS INC (US INDUSTRIAL COMMON STOCK) (Y)									
1864. ---SENIOR PLC (SEE NOTE 17 IN SECT VIII)		None	J	W					
1865. ---REFLECTIVITY HOLDINGS (SEE NOTE 17 IN SECTION VIII)		None	J	W					
1866. ---CASH HELD AT GOLDMAN SACHS AND CITI (SEE NOTES 17 & 23 SECT VIII)		None	L	T					
1867. ---PROMISSORY NOTE FROM JJ CHURCHILL HOLDINGS (NOTE 17 IN SECT VIII)		None	J	W					
1868. ---PLX (SEE NOTE 17 IN SECTION VIII)	B	Dividend			Sold	05/22/24	K		
1869. 3G FUND V LP (SEE NOTE 9 IN SECT VIII)	C	Distribution	O	U					
1870. ---HUNTER DOUGLAS BV COMMON STOCK		None	O	W					
1871. VALINOR LP (SEE NOTE 9 IN SECT VIII)	D	Distribution	O	U	Buy (add'l)	02/26/24	J		
1872. ---(FUND INVESTS IN BUSINESS PRODS & SERVICES AND INDUSTRIALS)					Buy (add'l)	06/11/24	J		
1873. ---BAKED BY MELISSA		None	N	W					
1874. ---HIGHER GROUND EDUCATION - DEEMED WORTHLESS AT YEAR-END (Y)									
1875. ---SUPER SPORTS HOLDINGS		None	N	W					

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1876. ---RAMBLING SPARKLING WATER		None	M	W					
1877. ---RENTACRATE ENTERPRISES		None	M	W					
1878. ---OTHER ASSET - INTEREST RECEIVABLE		None	K	W					
1879. OTHER INVESTMENTS/NOTES RECEIVABLES (H)									
1880. BLACKSTONE REIT	A	Distribution			Redeemed (part)	01/04/24	J	D	
1881.					Redeemed (part)	02/02/24	J	C	
1882.					Redeemed	03/04/24	J	A	
1883. BLUE LOTUS INVESTMENT FUND (SEE NOTE 1 IN SECT VIII)	E	Distribution	P1	U					
1884. BLUEPRINT BALTIMORE OPPTY ZONE FUND (NOTE 1 SECT VIII)		None	P1	U					
1885. BLUEPRINT TEXAS OPPTUNITY ZONE FUND (NOTE 1 SECT VIII)		None	P1	U	Distributed (part)	02/05/24	J		
1886. GOLD BULLION		None	O	T					
1887. F. E. RICHARDSON & CO (SEE NOTES 1 & 13 IN SECT VIII)		None	L	V	Buy (add'l)	02/12/24	L		
1888.					Buy (add'l)	03/07/24	L		
1889.					Buy (add'l)	04/11/24	L		
1890.					Buy (add'l)	04/26/24	K		
1891.					Buy (add'l)	05/13/24	L		
1892.					Buy (add'l)	06/05/24	M		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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1893.					Buy (add'l)	06/18/24	K		
1894.					Buy (add'l)	07/24/24	L		
1895.					Buy (add'l)	09/09/24	L		
1896.					Buy (add'l)	10/09/24	L		
1897.					Buy (add'l)	11/18/24	L		
1898. OVERLOOK PARTNERS - (SEE NOTE 1 IN SECT VIII)	D	Distribution	M	U					
1899. OVERLOOK 3G PARTNERS (SEE NOTE 1 IN SECT VIII)	E	Distribution	O	U					
1900. KF CHECKMATE (SEE NOTE 1 IN SECT VIII)		None	M	U					
1901. GOSECURE (FKA COUNTER TACK) (AKA RE 6)(NOTE 1 IN SECT VIII)		None	N	U					
1902. NEWSGUARD TECHNOLOGY CORP		None	P1	U					
1903. PERCEPTIVE LIFE SCIENCES (NOTE 1 IN SECT VIII)		None	O	U					
1904. REDWOOD OPPORTUNITY FUND (SEE NOTE 1 IN SECT VIII)	G	Distribution	P1	U					
1905. RTW ONSHORE FUND (NOTE 1 IN SECT VIII)	E	Distribution	O	U					
1906. VEROS (RE II SIDECAR 3) (NOTE 1 IN SECT VIII)		None	M	U					
1907. WHALE ROCK FLAGSHIP FUND (NOTE 1 IN SECT VIII)		None	M	U	Redeemed (part)	04/19/24	K		
1908. WHALE ROCK HYBRID FUND II (NOTE 1 IN SECT VIII)	F	Distribution	O	U					
1909. WHALE ROCK LONG OPPORTUNITIES FUND (NOTE 1 IN SECT VIII)	G	Distribution	P1	U					

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1910. TRUST #1 (SEE NOTE 2 SECT VIII)(H)									
1911. ---CITI TRUST CHECKING ACCOUNT (2010)	A	Interest	K	T					
1912. ---GOLDMAN SACHS BANK DEPOSIT/ CASH #4	C	Interest	L	T					
1913. COMMON STOCKS (H)									
1914. ---AMAZON.COM INC		None	N	T					
1915. ---COSTCO WHOLESALE CORP	D	Dividend	N	T	Sold (part)	10/14/24	K	E	
1916. ---HOME DEPOT, INC	D	Dividend	N	T					
1917. ---JOHNSON & JOHNSON	C	Dividend	L	T					
1918. ---MASTERCARD INC	C	Dividend	O	T	Sold (part)	03/19/24	K	E	
1919. ---MICROSOFT CORPORATION	B	Dividend	N	T	Sold (part)	10/14/24	K	D	
1920. ---UNITEDHEALTH GROUP INC		None			Buy (add'l)	01/08/24	L		
1921.					Sold	03/07/24	M	F	
1922. ---ISHARES FLEXIBLE INCOME ACTIVE ETF	B	Dividend	L	T	Buy	10/14/24	L		
1923. ---ISHARES TREASURY FLOATING RATE BOND ETF	E	Dividend	N	T	Sold (part)	01/23/24	L		
1924.					Buy (add'l)	03/19/24	L		
1925.					Sold (part)	10/14/24	L		
1926. ---GOLDMAN SACH BANK DEPOSIT/ CASH #5	B	Interest	J	T					

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1927. FIXED INCOME (H)									
1928. ---3M COMPANY MTN 3.375% 3/1/2029	A	Interest	J	T					
1929. ---AGILENT TECHNOLOGIES INC 2.3% 3/12/2031	A	Interest	J	T					
1930. ---AIR LEASE CORP 1.875% 8/15/2026	A	Interest	J	T					
1931. ---ASTRAZENECA PLC 3.375% 11/16/2025	A	Interest	J	T					
1932. ---AUTONATION INC 3.85% 3/1/32	A	Interest	J	T					
1933. ---BANK OF AMERICA CORP HYBRID MTN 6/14/24	A	Interest			Redeemed	05/14/24	J	A	
1934. ---BANK OF MONTREAL MTN 4.7% 9/14/27	A	Interest	J	T					
1935. ---BANK OF NY MELLON CORP HYBRID MTN 6/13/28	A	Interest	J	T					
1936. ---BAT CAPITAL CORP 3.215% 9/6/26	A	Interest	J	T					
1937. ---BAXTER INTERNATIONAL INC 2.272% 12/1/28	A	Interest	J	T					
1938. ---BOSTON MASS GO .830% 3/1/26	A	Interest	J	T	Buy	05/07/24	J		
1939. ---BOSTON MASS GO 1.368% 3/1/30	A	Interest	K	T	Buy	06/27/24	K		
1940. ---BROADCOM INC 4.3% 11/15/32	A	Interest	J	T					
1941. ---BUNGE LTD FINANCE CORP 2.75% 5/14/31	A	Interest	J	T					
1942. ---CAPITAL ONE FINANCIAL CORP HYBRID 5/10/28	A	Interest	J	T					
1943. ---CAPITAL ONE FINANCIAL CORP HYBRID 7/29/32	A	Interest	J	T					

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1944. ---CITIGROUP INC HYBRID 11/3/25	A	Interest			Redeemed	11/04/24	J	A	
1945. ---CITIZENS FINANCIAL GROUP 3.25% 4/30/30	A	Interest	J	T					
1946. ---COMCAST CORP 3.95% 10/15/25	A	Interest	J	T					
1947. ---COMMONWEALTH OF MASS GO 5% 10/1/30	A	Interest	J	T	Buy	05/20/24	J		
1948. ---DELL INT LLC/EMC CORP 4.9% 10/1/26	A	Interest	J	T					
1949. ---DOW CHEMICAL CO 4.8% 11/30/28	A	Interest	J	T					
1950. ---EBAY INC 2.6% 5/10/31	A	Interest	J	T					
1951. ---ENABLE MIDSTREAM PARTNERS 4.15% 9/15/29	A	Interest	J	T					
1952. ---ENTERGY CORP 2.8% 6/15/30	A	Interest	J	T					
1953. ---ENTERGY LA LLC 2/35% 6/15/32	A	Interest	J	T					
1954. ---GATX CORP 4.0% 6/30/30	A	Interest	J	T					
1955. ---GENERAL MOTORS CO 5.6% 10/15/32	A	Interest	J	T					
1956. ---INTEL COPORATION 5.2% 2/10/33	A	Interest	J	T					
1957. ---INVESCO FINANCE PLC 3.75% 1/15/26	A	Interest	J	T					
1958. ---MASS BAY TRANSN AUTH MASS 4% 5/1/25	A	Interest	J	T	Buy	05/01/24	J		
1959. ---MASS DEPT TRNSN MET REV 5% 1/1/32	A	Interest	J	T	Buy	05/03/24	J		
1960. ---MA ST COLLEGE BLDG REV 5% 5/1/24	A	Interest			Matured	05/01/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1961. ---MA ST COLLGE BLDG REV 5% 5/1/31	A	Interest	J	T	Buy	05/01/24	J		
1962. ---MA ST DEV FIN AGY REV 5% 3/1/34	A	Interest	K	T	Buy	05/07/24	K		
1963. ---MA ST GO 5% 5/1/29	A	Interest	J	T	Buy	05/01/24	J		
1964. ---MA ST GO 5% 1/1/34	A	Interest	J	T	Buy	05/01/24	J		
1965. ---MA ST GO 5% 3/1/34	A	Interest	K	T	Buy	05/01/24	K		
1966. ---MA ST GO 4.5% 7/1/34	A	Interest	J	T	Buy	05/06/24	J		
1967. ---MA ST HEALTH & EDL REV 6.432% 10/1/35	A	Interest	K	T	Buy	01/19/24	J		
1968.					Buy (add'l)	12/03/24	J		
1969. ---MA ST PORT AUTH REV 1.155% 7/1/28	A	Interest	J	T	Buy	05/07/24	J		
1970. ---MA ST SCH BLDG AUTH 2.436% 10/15/27	A	Interest	J	T	Buy	05/07/24	J		
1971. ---MA ST SPL OBLIG REV 3.67% 7/15/25	A	Interest	J	T					
1972. ---MA WTR RES AUTH REV 1.94% 8/1/30	A	Interest			Redeemed	06/26/24	J	A	
1973. ---MA WTR RES AUTH REV 2.09% 8/1/31	A	Interest	J	T	Buy	05/07/24	J		
1974.					Redeemed (part)	06/26/24	J	A	
1975. ---MID-AMERICA APARTMENTS 3.95% 3/15/29	A	Interest	J	T					
1976. ---MITSUBISHI UFJ FINANCIAL GROUP 3.287% 7/25/27	A	Interest	J	T					
1977. ---MITSUBISHI UFJ FINANCIAL GROUP 4.05% 9/11/28	A	Interest	J	T					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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1978. ---MPLX LP 4.95% 9/1/32	A	Interest	J	T					
1979. ---NXP BV/NXP FDG/NXP USA 4.3% 6/18/29	A	Interest	J	T					
1980. ---ORACLE CORP 3.25% 5/15/30	A	Interest	J	T					
1981. ---PAYPAL HOLDINGS INC 4.4% 6/1/32	A	Interest	J	T					
1982. ---PERKINELMER INC 3.3% 9/15/29	A	Interest	J	T					
1983. ---PHILIP MORRIS INTERNATIONAL IN 2.75% 2/25/26	A	Interest	J	T					
1984. ---REALTY INCOME CORP 3.95% 8/15/27	A	Interest	J	T					
1985. ---ROYAL BANK OF CANADA MTN 4.65% 1/27/26	A	Interest	J	T					
1986. ---SANTANDER UK PLC 4% (X)	A	Interest			Matured	03/13/24	J	A	
1987. ---SOMERVILLE MASS GO 4% 6/1/31	A	Interest	J	T	Buy	05/03/24	J		
1988. ---SOUTHERN COMPANY GAS CAPITAL 1.75% 1/15/31	A	Interest	J	T					
1989. ---SPECTRA ENERGY PARTNERS 3.375% 10/15/26	A	Interest	J	T					
1990. ---STANLEY BLACK & DECKER 3% 5/15/32	A	Interest	J	T					
1991. ---SUMITOMO MITSUI FINCANCIAL GROUP 3.944% 7/19/28	A	Interest	J	T					
1992. ---SYNCHRONY FINANCIAL 3.95% 12/1/27	A	Interest	J	T					
1993. ---THE BANK OF NOVA SCOTIA 4.5% 12/16/25	A	Interest	J	T					
1994. ---TORONTO-DOMINION BANK MTN 4.693% 9/15/27	A	Interest	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1995. ---UDR INC 3% 8/15/31	A	Interest	J	T					
1996. ---UNIVERSITY MASS BLDG AUTH 2.17% 11/1/29	A	Interest	J	T	Buy	05/07/24	J		
1997. ---UNIVERSITY MASS BLDG AUTH PROJ 5% 11/1/32	A	Interest	J	T	Buy	05/02/24	J		
1998. ---WELLS FARGO & CO HYBRID MTN 5/22/28	A	Interest	J	T					
1999. ---WESTPAC BANKING CORP HYBRID MTN 11/23/31	A	Interest	J	T					
2000. TRUST #1B (NOTE 2 IN SECT VIII) (H)									
2001. ---CITI TRUST CHECKING ACCOUNT (2012)		None	J	T					
2002. ---FARALLON CAPITAL (NOTES 5,7, & 9 IN SECT VIII)	B	Interest	L	U					
2003. ---2008 ENFOCA PRIVATE EQUITY INVESTMENTS IN PERU		None	J	U					
2004. ---BARRIER ISLAND IN THE BAHAMAS		None	K	U					
2005. ---ACREAGE FOR MIXED USE ON THE NAPA RIVER IN NAPA CA		None	J	U					
2006. ---LAND IN PALMDALE, CA		None	J	U					
2007. ---CASH HELD AT GOLDMAN SACHS (X)		None	K	T					
2008. ---FIDELITY GOVERNMENT MONEY MARKET (SPAXX)	B	Dividend	J	T	Buy	04/24/24	L		
2009.					Sold (part)	04/29/24	L		
2010.					Buy (add'l)	04/30/24	N		
2011.					Buy (add'l)	05/06/24	J		

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2012.					Sold (part)	05/09/24	N		
2013.					Buy (add'l)	05/13/24	M		
2014.					Sold (part)	05/20/24	M		
2015.					Buy (add'l)	05/31/24	M		
2016.					Sold (part)	06/04/24	L		
2017.					Buy (add'l)	06/06/24	J		
2018.					Sold (part)	06/10/24	L		
2019.					Buy (add'l)	06/17/24	K		
2020.					Sold (part)	06/24/24	K		
2021.					Buy (add'l)	06/28/24	J		
2022.					Buy (add'l)	07/02/24	J		
2023.					Buy (add'l)	07/08/24	J		
2024.					Buy (add'l)	07/11/24	J		
2025.					Sold (part)	07/30/24	J		
2026.					Buy (add'l)	08/05/24	J		
2027.					Buy (add'l)	09/03/24	J		
2028.					Buy (add'l)	09/16/24	J		

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	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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2029.					Buy (add'l)	09/23/24	J		
2030.					Buy (add'l)	09/30/24	J		
2031.					Buy (add'l)	10/01/24	J		
2032.					Sold (part)	10/07/24	K		
2033.					Buy (add'l)	10/11/24	M		
2034.					Buy (add'l)	10/15/24	K		
2035.					Sold (part)	10/16/24	M		
2036.					Buy (add'l)	10/31/24	J		
2037.					Sold (part)	11/01/24	J		
2038.					Buy (add'l)	11/04/24	M		
2039.					Sold (part)	11/05/24	M		
2040.					Sold (part)	11/15/24	J		
2041.					Buy (add'l)	11/15/24	J		
2042.					Buy (add'l)	12/02/24	M		
2043.					Sold (part)	12/03/24	M		
2044.					Sold (part)	12/12/24	J		
2045.					Buy (add'l)	12/12/24	J		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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2046.					Buy (add'l)	12/16/24	N		
2047.					Sold (part)	12/17/24	N		
2048.					Buy (add'l)	12/26/24	J		
2049.					Buy (add'l)	12/27/24	J		
2050.					Sold (part)	12/30/24	J		
2051.					Buy (add'l)	12/31/24	J		
2052. ---FIDELITY TREASURY ONLY MMF (FDLXX)	A	Dividend	J	T	Buy	11/15/24	J		
2053.					Sold (part)	12/03/24	J		
2054.					Buy (add'l)	12/12/24	J		
2055.					Sold (part)	12/17/24	J		
2056.					Buy (add'l)	12/30/24	J		
2057. ---ADOBE INC COMMON STOCK		None	M	T	Sold (part)	06/03/24	L		
2058.					Sold (part)	06/14/24	K	E	
2059. ---ALPHABET INC COMMON STOCK	B	Dividend	O	T					
2060. ---AMAZON.COM INC COMMON STOCK		None	M	T					
2061. ---BLACKSTONE GROUP INC COMMON STOCK (BX)	D	Dividend	O	T					
2062. ---COSTCO WHOLESALE CORP COMMON STOCK	D	Dividend	N	T					

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H1 =$1,000,001 - $5,000,000
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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
P1 =$1,000,001 - $5,000,000
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2063. ---FEDERAL HOME LOAN BANKS BOND 5% 1/8/27	A	Interest	L	T	Buy	01/19/24	L		
2064. ---FEDERAL HOME LOAN BANKS BOND 5% 7/11/25	A	Interest			Buy	01/19/24	M		
2065.					Redeemed	10/11/24	L		
2066. ---FEDERAL HOME LOAN BANKS BOND 4.875% 6/12/26	A	Interest	M	T	Buy	05/17/24	M		
2067. ---HCA HEALTHCARE INC COMMON STOCK	C	Dividend	O	T					
2068. ---HONEYWELL INTL INC COMMON STOCK		None			Sold	01/19/24	M		
2069. ---ISHARES FLEXIBLE INCOME ACTIVE ETF	B	Dividend			Buy	07/29/24	L		
2070.					Buy (add'l)	10/04/24	K		
2071.					Buy (add'l)	10/31/24	J		
2072.					Sold	11/01/24	L		
2073. ---ISHARES TRUST TRS FLT RT BD ETF (TFLO)	B	Dividend			Sold (part)	06/05/24	J		
2074.					Sold (part)	06/21/24	K	A	
2075.					Sold	07/29/24	L	A	
2076. ---JOHNSON & JOHNSON COMMON STOCK	B	Dividend			Sold	06/21/24	L	E	
2077. ---MICROSOFT CORP COMMON STOCK	C	Dividend	N	T					
2078. ---NVIDIA CORP	A	Dividend	O	T					
2079. ---SCHWAB FUNDS US TREASURY MONEY FUND (SNSXX)	A	Dividend			Buy (add'l)	01/17/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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Wood, Kimba M.	10/06/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
2080.					Buy (add'l)	02/16/24	J		
2081.					Buy (add'l)	03/27/24	J		
2082.					Sold	04/15/24	L		
2083. ---SERVICENOW INC COMMON STOCK		None	N	T	Buy (add'l)	04/25/24	L		
2084. ---UNITEDHEALTH GROUP INC COMMON STOCK	A	Dividend			Sold	05/09/24	M	E	
2085. ---VANGUARD CONSUMER DISCRETIONARY ETF (VCR)		None			Sold	01/24/24	M		
2086. ---VANGUARD DIVIDEND APPRECIATION FUND (VIG)	D	Dividend	N	T	Sold (part)	10/14/24	J	C	
2087. ---VANGUARD INFORMATION TECHNOLOGY ETF (VGT)	C	Dividend	O	T	Sold (part)	10/14/24	K	E	
2088. ---US TREASURY NOTES 2.375% 2/29/24 (SEE NOTE 6 IN SECTION VIII)	B	Interest							
2089. ---US TREASURY NOTES 2.25% 4/30/2024 (SEE NOTE 6 IN SECTION VIII)	C	Interest							
2090. ---US TREASURY NOTES 2.125% 3/31/24 (SEE NOTE 6 IN SECTION VIII)	B	Interest							
2091. ---US TREASURY NOTES 2% 5/31/2024 (SEE NOTE 6 IN SECTION VIII)	B	Interest							
2092. ---US TREASURY NOTES 3.5% 9/15/2025 (SEE NOTE 6 IN SECTION VIII)	D	Interest	M	T					
2093. ---US TREASURY NOTES 4.5% 11/30/2024 (SEE NOTE 6 IN SECTION VIII)	C	Interest							
2094. ---US TREASURY NOTES 4.625% 2/28/25 (SEE NOTE 6 IN SECTION VIII)	B	Interest	M	T					
2095. ---US TREASURY NOTES 2.75% 5/15/25 (SEE NOTE 6 IN SECTION VIII)		None	L	T					

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
2096. ---US TREASURY NOTES 4.625% 6/30/25 (SEE NOTE 6 IN SECTION VIII)	C	Interest	M	T					
2097. ---US TREASURY NOTES 5% 10/31/25 (SEE NOTE 6 IN SECTION VIII)	D	Interest	M	T					
2098. ---US TREASURY NOTES 4.25% 12/31/25 (SEE NOTE 6 IN SECTION VIII)	D	Interest	N	T					
2099. ---US TREASURY NOTES 4.25% 1/31/26 (SEE NOTE 6 IN SECTION VIII)		None	M	T					
2100. ---US TREASURY NOTES 4.875% 4/30/26 (SEE NOTE 6 IN SECTION VIII)	D	Interest	N	T					
2101. ---US TREASURY NOTES 4.875% 5/31/26 (SEE NOTE 6 IN SECTION VIII)	D	Interest	N	T					
2102. ---US TREASURY NOTES 4.625% 10/15/26 (SEE NOTE 6 IN SECTION VIII)		None	L	T					
2103. TRUST #2 (SEE NOTE 19 IN SECT VIII) (H)									
2104. ---TD AMERITRADE INSURED DEPOSIT/CASH ACCOUNT	A	Interest			Closed	04/18/24	J		
2105. ---FIDELITY GOVERNMENT MONEY MARKET FUND (SPAXX)	A	Dividend	K	T	Buy	04/18/24	J		
2106.					Buy (add'l)	06/24/24	K		
2107.					Sold (part)	08/05/24	K		
2108.					Buy (add'l)	08/12/24	K		
2109.					Sold (part)	08/15/24	K		
2110.					Buy (add'l)	08/15/24	J		
2111.					Sold (part)	10/07/24	J		
2112.					Buy (add'l)	12/30/24	K		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
2113. ---FIDELITY TAX EXEMPT MMKT FUND PREMIUM (FZEXX)	A	Dividend	J	T	Buy	08/15/24	K		
2114.					Buy (add'l)	10/07/24	J		
2115.					Sold (part)	10/23/24	K		
2116.					Sold (part)	10/28/24	K		
2117.					Sold (part)	10/31/24	J		
2118. ---COSTCO WHOLESALE CORP COMMON STOCK (COST)	B	Dividend	L	T	Buy (add'l)	03/08/24	J		
2119. ---GE AEROSPACE (GE)		None	K	T	Buy	10/22/24	K		
2120. ---HCA HEALTHCARE INC	A	Dividend			Buy	10/25/24	K		
2121.					Sold	12/27/24	K		
2122. ---INVESCO QQQ TRUST SERVICES FUND (QQQ)	A	Dividend	L	T					
2123. ---ISHARES TRUST TRS FLT RT BOND ETF (TFLO)	A	Dividend			Sold (part)	03/04/24	K		
2124.					Sold	03/22/24	K	A	
2125. ---ISHARES RUSSELL MID-CAP GROWTH ETF (IWP)	A	Dividend			Sold	06/21/24	K	D	
2126. ---ISHARES SHORT MATURITY MUNI BOND ETF (MEAR)	B	Dividend	K	T	Buy	03/22/24	K		
2127. ---ELI LILLY & CO (LLY)	A	Dividend	K	T	Buy	08/02/24	J		
2128.					Buy (add'l)	10/30/24	J		
2129. ---META PLATFORMS INC	A	Dividend			Buy	03/04/24	K		

1. Income Gain Codes: (See Columns B1 and D4)
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B =$1,001 - $2,500
C =$2,501 - $5,000
D =$5,001 - $15,000
E =$15,001 - $50,000
F =$50,001 - $100,000
G =$100,001 - $1,000,000
H1 =$1,000,001 - $5,000,000
H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
P1 =$1,000,001 - $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
2130.					Sold	08/09/24	K	A	
2131. ---NVIDIA CORP (NVDA)	A	Dividend	M	T					
2132. ---OCCIDENTAL PETROLEUM CORP (OXY)	A	Dividend			Sold	08/09/24	K	A	
2133. ---ROCKWALL TEX INDPT SCH DIST 5% BOND DUE 2/15/46	C	Interest	L	T					
2134. ---SCHWAB FUNDS TREAS OBLIG MUTUAL FUND (SNOXX)	A	Dividend			Buy (add'l)	01/19/24	J		
2135.					Buy (add'l)	02/16/24	J		
2136.					Sold (part)	03/08/24	J		
2137.					Buy (add'l)	03/27/24	J		
2138.					Sold	04/15/24	J		
2139. ---VANGUARD DIVIDEND APPRECIATION ETF (VIG)	B	Dividend	M	T					
2140. TRUST #3 (SEE NOTE 19 IN SECT VIII) (H)									
2141. ---TD AMERITRADE CASH ACCOUNT	A	Interest			Closed	04/18/24	K		
2142. ---FIDELITY GOVERNMENT MONEY MARKET FUND (SPAXX)	B	Dividend	J	T	Buy	04/18/24	K		
2143.					Buy (add'l)	05/23/24	K		
2144.					Buy (add'l)	06/24/24	J		
2145.					Sold (part)	06/27/24	K		
2146.					Sold (part)	06/28/24	K		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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2147.					Buy (add'l)	07/12/24	J		
2148.					Buy (add'l)	07/15/24	J		
2149.					Buy (add'l)	08/01/24	J		
2150.					Sold (part)	08/15/24	L		
2151.					Buy (add'l)	08/15/24	K		
2152.					Buy (add'l)	09/16/24	L		
2153.					Sold (part)	09/20/24	L		
2154.					Sold (part)	11/06/24	J		
2155.					Buy (add'l)	11/06/24	J		
2156. ---ACCENTURE PLC	A	Dividend			Buy	03/21/24	K		
2157.					Sold	05/21/24	K		
2158. ---ADOBE INC COMMON STOCK		None	K	T	Sold (part)	05/21/24	J	C	
2159. ---AMAZON.COM INC COMMON STOCK		None	L	T					
2160. ---AMGEN INC COMMON STOCK	A	Dividend	K	T					
2161. ---APPLE INC COMMON STOCK	A	Dividend	L	T					
2162. ---CHIPOTLE MEXICAN GRILL INC		None	K	T	Buy	06/27/24	K		
2163.					Buy (add'l)	07/11/24	J		

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2164. ---CONSTELLATION ENERGY CORP	A	Dividend	K	T	Buy	11/04/24	K		
2165. ---FIDELITY CONSERVATIVE INCOME MUNI BOND FUND (FMNDX)	A	Int./Div.	L	T	Buy	09/19/24	L		
2166. ---FIDELITY TAX EXEMPT MMKT FUND PREMIUM (FZEXX)	A	Int./Div.	K	T	Buy	08/15/24	L		
2167.					Sold (part)	10/18/24	K		
2168.					Sold (part)	11/05/24	J		
2169.					Buy (add'l)	11/06/24	J		
2170. ---ALPHABET INC COMMON STOCK	A	Dividend	L	T					
2171. ---HOME DEPOT INC COMMON STOCK	B	Dividend	K	T					
2172. ---ISHARES S&P MID-CAP ETF (IJH)	A	Dividend	K	T					
2173. ---ISHARES US MED DVC ETF (IHI)	A	Dividend	K	T	Sold (part)	07/12/24	J	C	
2174. ---JP MORGAN CHASE & CO COMMON STOCK	A	Dividend	K	T					
2175. ---MICROSOFT CORP COMMON STOCK	A	Dividend	L	T					
2176. ---PHARR-SAN JUAN-ALAMO TEX INDPT 5% BONDS (2/1/28)	C	Interest	L	T					
2177. ---PIMCO NEW YORK MUNICIPAL INCOME FUND (PNI)		None			Buy	10/17/24	K		
2178.					Sold (part)	11/04/24	J		
2179.					Sold	11/05/24	J		
2180. ---SAN ANTONIO TEX INDPT SCH DIST 5% BONDS (8/15/24)	B	Interest			Matured	08/15/24	K		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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2181. ---SCHWAB FUNDS TREAS OBLIG (SNOXX)	A	Dividend			Buy (add'l)	02/16/24	J		
2182.					Buy (add'l)	03/01/24	J		
2183.					Sold (part)	03/14/24	J		
2184.					Sold (part)	03/21/24	K		
2185.					Sold	04/15/24	K		
2186. ---UNITEDHEALTH GROUP INC COMMON STOCK	A	Dividend	K	T	Sold (part)	05/21/24	J	C	
2187.					Sold (part)	06/21/24	J	C	
2188.					Sold (part)	07/11/24	J	D	
2189. ---US TREAS NOTES .875% 1/31/2024 (SEE NOTE 6 IN SECTION VIII)	A	Interest							
2190. ---US TREAS NOTES 1.5% 2/29/2024 (SEE NOTE 6 IN SECTION VIII)	A	Interest							
2191. ---US TREAS NOTES 1.5% 2/15/2025 (SEE NOTE 6 IN SECTION VIII)	A	Interest	K	T					
2192. ---VERTIV HOLDINGS CO	A	Dividend	K	T	Buy	06/26/24	K		
2193. ---VISA INC COMMON STOCK	A	Dividend	K	T					
2194. TRUST #4 (SEE NOTE 2 IN SECT VIII) (H)									
2195. ---PARK AVENUE EQUITY LP (SEE NOTE 9 IN SECT VIII)		None	J	W					
2196. TRUST #5 (NOTE 2 IN SECT VIII) (H)									
2197. ---TD AMERITRADE DEPOSIT ACCOUNT/CASH	A	Interest			Closed	04/24/24	L		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

Name of Person Reporting	Date of Report
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
2198. ---FIDELITY GOVERNMENT MONEY MARKET FUND (SPAXX)	B	Dividend	J	T	Buy	04/24/24	L		
2199.					Buy (add'l)	04/30/24	N		
2200.					Sold (part)	05/09/24	M		
2201.					Sold (part)	05/10/24	K		
2202.					Sold (part)	05/13/24	K		
2203.					Buy (add'l)	05/31/24	M		
2204.					Sold (part)	06/04/24	M		
2205.					Buy (add'l)	07/01/24	M		
2206.					Sold (part)	07/03/24	M		
2207.					Buy (add'l)	07/05/24	J		
2208.					Buy (add'l)	07/31/24	N		
2209.					Sold (part)	08/02/24	N		
2210.					Buy (add'l)	08/06/24	J		
2211.					Buy (add'l)	09/03/24	N		
2212.					Sold (part)	09/06/24	N		
2213.					Buy (add'l)	10/04/24	J		
2214.					Buy (add'l)	10/16/24	K		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
2215.					Sold (part)	10/23/24	K		
2216.					Buy (add'l)	10/28/24	J		
2217.					Sold (part)	10/31/24	K		
2218.					Buy (add'l)	11/05/24	K		
2219.					Buy (add'l)	11/06/24	J		
2220.					Sold (part)	11/07/24	J		
2221.					Buy (add'l)	11/08/24	J		
2222.					Sold (part)	11/14/24	J		
2223.					Sold (part)	11/21/24	K		
2224.					Sold (part)	11/26/24	K		
2225.					Sold (part)	12/03/24	J		
2226.					Buy (add'l)	12/05/24	J		
2227.					Sold (part)	12/06/24	J		
2228.					Sold (part)	12/20/24	K		
2229.					Buy (add'l)	12/20/24	K		
2230.					Sold (part)	12/23/24	J		
2231.					Buy (add'l)	12/23/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
2232.					Sold (part)	12/30/24	K		
2233.					Buy (add'l)	12/30/24	K		
2234. ---FIDELITY TREASURY ONLY MONEY MARKET FUND (FDLXX)	A	Dividend	K	T	Buy	11/21/24	K		
2235.					Sold (part)	12/03/24	J		
2236.					Buy (add'l)	12/06/24	J		
2237.					Sold (part)	12/18/24	J		
2238.					Buy (add'l)	12/20/24	K		
2239.					Buy (add'l)	12/23/24	J		
2240.					Sold (part)	12/27/24	K		
2241.					Buy (add'l)	12/30/24	K		
2242. ---ALPHABET INC COMMON STOCK (GOOGL)	A	Dividend	K	T	Buy	01/31/24	J		
2243.					Buy (add'l)	02/26/24	J		
2244. ---CAVA GROUP INC COMMON STOCK (CAVA)		None	K	T	Buy	12/17/24	J		
2245.					Buy (add'l)	12/19/24	J		
2246. ---CINTAS CORP COMMON STOCK (CTAS)		None	K	T	Buy	12/26/24	K		
2247. ---CONSTELLATION ENERGY CORP COMMON STOCK (CEG)	A	Dividend	K	T	Buy	11/04/24	K		
2248.					Buy (add'l)	11/13/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
2249. ---ELI LILLY & CO COMMON STOCK (LLY)	A	Dividend	K	T	Buy	10/30/24	K		
2250.					Buy (add'l)	11/06/24	J		
2251. ---GE AEROSPACE COMMON STOCK (GE)		None	K	T	Buy	10/22/24	K		
2252.					Buy (add'l)	10/25/24	J		
2253. ---HCA HEALTHCARE INC COMMON STOCK (HCA)	A	Dividend	K	T	Buy	10/25/24	K		
2254.					Buy (add'l)	11/06/24	J		
2255.					Buy (add'l)	11/25/24	K		
2256.					Sold (part)	12/27/24	K		
2257. ---ISHARES TREASURY FLOATING RATE (TFLO)	E	Dividend	O	T	Buy	05/08/24	L		
2258.					Buy (add'l)	05/09/24	K		
2259.					Buy (add'l)	06/03/24	M		
2260.					Buy (add'l)	07/02/24	M		
2261.					Buy (add'l)	08/01/24	N		
2262.					Buy (add'l)	09/05/24	N		
2263.					Sold (part)	10/15/24	K		
2264.					Sold (part)	10/25/24	K	A	
2265.					Sold (part)	11/04/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
2266.					Sold (part)	11/07/24	K		
2267.					Sold (part)	12/19/24	K		
2268. ---JP MORGAN EXCHANGE TRADED FUND EQUITY PREMIUM (JEPI)	A	Dividend	K	T	Buy	12/02/24	K		
2269. ---MICROSOFT CORP COMMON STOCK	A	Dividend	K	T					
2270. ---PARK AVENUE EQUITY LP (SEE NOTE 9 IN SECT VIII)		None	J	W					
2271. ---SCHWAB US TREASURY MMF (SNSXX)	A	Dividend			Buy (add'l)	01/19/24	J		
2272.					Buy (add'l)	01/31/24	J		
2273.					Sold (part)	02/26/24	J		
2274.					Buy (add'l)	03/01/24	J		
2275.					Sold	04/15/24	L		
2276. ---UNITEDHEALTH GROUP INC COMMON STOCK	A	Dividend			Sold	05/08/24	K	B	
2277. ---VANGUARD DIVIDEND APPRECIATION ETF (VIG)	B	Dividend	L	T					
2278. ---VANGUARD TOTAL STOCK ETF (VTI)	A	Dividend	K	T	Buy	11/07/24	K		
2279. ---US TREASURY NOTES 2.25% (SEE NOTE 6 IN SECTION VIII)	A	Interest							
2280. ---US TREASURY NOTES 2.125% 3/31/2024 (SEE NOTE 6 IN SECTION VIII)	C	Interest							
2281. ---US TREASURY NOTES .875% 1/31/2024 (SEE NOTE 6 IN SECTION VIII)	B	Interest							

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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2282. ---US TREASURY NOTES 1.5% 2/29/2024 (SEE NOTE 6 N SECTION VIII)	A	Interest							
2283. ---US TREASURY NOTES 2.5% 4/30/2024 (SEE NOTE 6 IN SECTION VIII)	C	Interest							
2284. ---US TREASURY NOTES 3.0% (SEE NOTE 6 IN SECTION VIII)	C	Interest							
2285. ---US TREASURY NOTES 3% (SEE NOTE 6 N SECTION VIII)	C	Interest							
2286. ---US TREASURY NOTES 3.25% (SEE NOTE 6 IN SECTION VIII)	C	Interest							
2287. ---US TREASURY NOTES 2% (SEE NOTE 6 IN SECTION VIII)	B	Interest							
2288. TRUST #6 (NOTE 2 IN SECT VIII) (H)									
2289. ---PARK AVENUE EQUITY LP (SEE NOTE 9 IN SECT VIII)		None	J	W					
2290. CUSTODIAL ACCOUNT #1 [redacted] AT GOLDMAN (SEE NOTE 2 SECT VIII) (H)									
2291. ---GOLDMAN CASH ACCOUNT #6	B	Interest	K	T					
2292. ---ACCENTURE PLC COMMON STOCK		None			Buy	03/21/24	J		
2293.					Sold	03/26/24	J		
2294. ---ADOBE INC COMMON STOCK		None			Sold	03/26/24	J		
2295. ---ALPHABET INC COMMON STOCK	A	Dividend	K	T	Buy (add'l)	01/31/24	J		
2296. ---APPLE INC COMMON STOCK	A	Dividend	J	T					
2297. ---BLACKSTONE GROUP INC COMMON STOCK	A	Dividend	J	T					
2298. ---CINTAS CORP COMMON STOCK	A	Dividend	K	T	Buy	03/21/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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2299. ---COSTCO WHOLESALE CORP COMMON STOCK		None			Buy	03/08/24	J		
2300.					Sold	03/26/24	J	A	
2301. ---GS TAX ADVANTAGED GLOBAL EQUITY PORTFOLIO	A	Dividend	K	T					
2302. ---JPMORGAN EQUITY PREMIUM INCOME COMMON (JEPI)	A	Dividend			Sold	03/26/24	J	A	
2303. ---META PLATFORMS INC COMMON STOCK		None			Buy	03/21/24	K		
2304.					Sold	05/21/24	K		
2305. ---MICROSOFT CORP COMMON STOCK	A	Dividend	J	T					
2306. ---NOVO-NORDISK ADR COMMON STOCK	A	Dividend	J	T					
2307. ---NVIDIA CORPORATION COMMON STOCK	A	Dividend	K	T					
2308. ---TRANSDIGM GROUP INC COMMON STOCK	B	Dividend	K	T	Buy	05/21/24	K		
2309. ---UNITED HEALTH GROUP INC COMMON STOCK		None			Sold	03/07/24	J	A	
2310. ---VISA INC COMMON STOCK	A	Dividend	K	T	Buy (add'l)	03/19/24	J		
2311. CUSTODIAL ACCOUNT #2[redacted] AT GOLDMAN (SEE NOTE 2 SECT VIII) (H)									
2312. ---GOLDMAN CASH ACCOUNT #7	B	Interest	K	T					
2313. ---ACCENTURE PLC COMMON STOCK		None			Buy	03/21/24	J		
2314.					Sold	03/26/24	J		
2315. ---ADOBE INC COMMON STOCK		None			Sold	03/26/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

Name of Person Reporting	Date of Report
Wood, Kimba M.	10/06/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
2316. ---ALPHABET INC COMMON STOCK		None			Buy	01/31/24	J		
2317.					Sold	03/08/24	J		
2318. ---APPLE INC COMMON STOCK	A	Dividend	J	T					
2319. ---BERKSHIRE HATHAWAY INC COMMON STOCK		None	J	T					
2320. ---CAVA GROUP INC COMMON STOCK		None	K	T	Buy	03/07/24	J		
2321. ---COSTCO WHOLESALE CORP COMMON STOCK		None			Buy	03/08/24	J		
2322.					Sold	03/26/24	J	A	
2323. ---GE AEROSPACE COMMON STOCK (GE)	A	Dividend	J	T	Buy	03/07/24	J		
2324. ---GE VERNOVA LLC COMMON STOCK (GEV)		None	J	T	Spinoff (from line 2323)	04/02/24	J		
2325. ---GS TAX-ADVANTED GLOBAL EQUITY PORTFOLIO COMMON STOCK	A	Dividend	J	T					
2326. ---MASTERCARD INC COMMON STOCK	A	Dividend	J	T	Buy	03/07/24	J		
2327. ---MICROSOFT CORP COMMON STOCK	A	Dividend	J	T					
2328. ---NVIDIA CORPORATIOAN COMMON STOCK	A	Dividend	K	T					
2329. ---TRANSDIGM GROUP INC COMMON STOCK	A	Dividend	J	T	Buy	05/21/24	J		
2330. ---UNITEDHEALTH GROUP INC COMMON STOCK		None			Sold	03/07/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

Name of Person Reporting	Date of Report
Wood, Kimba M.	10/06/2025

VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

GENERAL NOTES: Letters in parentheses at end of some descriptions in Column A represent ticker symbols (for preparer's use). Throughout this report on "Header" lines, BROWN ADVISORY/US BANK refers to Brown Advisory, wealth manager, and US BANK, Custodian.

NOTE 1: If a 2024 K-1 was issued for this entity, all activity (interest, dividends, capital gains, ordinary income, etc.) was netted together, and, if that net figure was larger than the required income threshold, it was included in Column B.(1) with Column B.(2) noting "Distribution." If the K-1 activity netted to a loss, then Column B.(1) was left blank and "None" was included in Column B.(2). If the entity received distributions during the year, including if the entity was sold, those amounts are included as transactions in Column D with gains being included in the K-1 amounts noted in Column B.(1).

NOTE 2: Reporting [redacted] is either the Trustee or the Investment Trustee of this Trust and the Trust was formed by the reporting [redacted]. Therefore, its assets are deemed reportable. For the [redacted] there is investment oversight and the reporting family opened the accounts. As such, assets are deemed reportable.

NOTE 3: For the reportable contracts that were opened (sold short) and closed during the reporting period, any related gains that occur when the contract is closed will be reported when the contract is closed if the closing transaction is reportable. If it is not, the gain will be posted on the short sale line (when the contract is opened). When closing a contract requires the purchase of shares, the transaction produces a gain if the amount received when the option was sold is more than the amount required to purchase the shares at the closing of the contract. For contracts closed in subsequent year, the gain will be reported at that time if the closing transaction is reportable. There is no year end value reported because the contracts had no value at the end of 2024. Please note that if a contract is opened and closed in the same year, and both transactions are reportable, they are included on successive lines and refer to the same contract. All contracts open and close. However, both sides of every contract are not necessarily reportable due to the transaction reporting threshold.

NOTE 4: Unfunded Trust.

NOTE 5: There are many investments in non-public companies. The estimated market values used for all such investments, unless otherwise noted, are the amounts shown either on the 12/31/2024 valuation from the Fund or on the [redacted] books as of 12/31/2024. The reporting [redacted] book amounts are based upon the current knowledge of the worth of such companies, available company issued reports and the cost of the initial investment, less distributions plus additional investments, if no updated value is available.

NOTE 6: US Treasury transactions are not reportable. However, there was interest income received that was over the reporting threshold. As such, it is included here with no other information. If the treasury was owned at the end of the prior year and it either matured or was sold in the current year, there will be no transaction reported and no year-end balance noted. If the treasury was bought and sold in 2024 there will be no transactions reported and no year-end balance. If the treasury was purchased in 2024 and still owned at year-end, the year-end value is included but there is no supporting transaction noted.

NOTE 7: For those entities which issued K-1s, if the K-1 netted to a loss but there was another source of income from the entity, the source of the other income and the related income are included. If there was K-1 income and an additional source of income, both amounts were summed to determine the code for Columns B.(1) and "Distribution" is noted in Column B.(2).

NOTE 8: Global Leaders was transferred from the [redacted] assets into a SLAT ([redacted] Lifetime Access Trust) on 5/10/2024. Reporting person is a co-trustee of the trust so it is deemed reportable. The Grantor Tax Letter (all income summed as for a K-1 and noted as a distribution in Column B) issued for the SLAT is included on Line 142.

NOTE 9: There is a limited partnership interest in this entity. The Financial Disclosure Report instructions require the listing of assets held by partnerships even when the filer and her [redacted] cannot direct, influence or in any other manner affect the purchase, exchange, sale or disposition of the entity or property owned by the entity. As such, investment details are reported when available from the Fund. Some of the Partnerships do not name their underlying investments but rather the types of industries in which they have invested. Two Funds (Offit Capital and Park Avenue Equity) have no underlying assets listed because the Filer does not receive any type of financial statements (including a schedule of investments) from the Fund. Included information was obtained from the Funds' websites, issued reports, etc. Portfolio investments new to the Report have an (X) after the name in Column A if no supporting purchase information is available for inclusion in Column D. Preparer reported the Filer's overall value in the Partnership and the Filer's values in the underlying companies owned by the Partnership. Note that Gemspring Goliath was formed this year to purchase Shrieve Chemical (previously owned by Gemspring Capital).

In cases where the Fund had a capital call or made a distribution without detail by investment, the transactions are included under the Fund line. If details of such activity is available by portfolio company, it may be included in both places (Fund line and portfolio company line).

If the partnership had a capital call for an investment in a specific company, either "Buy" or "Buy (add'l)" is noted on that company's line. If the partnership distributed funds relatead to a specific portfolio comnpany, "Distributed (part)" or "Distributed" is listed in Column D.(1) of the portfolio company's line. If the distribution is for the sale of an underlying company and the Fund provides that information, "Sold" or Sold (Part) is noted but the capital gain is listed on the Fund's line because the Partnerhip's K-1 is the source for related capital gains. The underlying portfolio companies do not issue K-1s. If the distribution was for current income, that amount was totaled and included in Column B of the portfolio company's line.

The Partnership's K-1 is considered the source document for all income from this investment (including capital gains/losses). All K-1 activity was netted together and if greater than the required income threshold, included in Column B.(1) with Column B.(2) noting "Distribution." If the K-1 activity netted to a loss, then Column B. (1) was left blank and "None" was included in Column B.(2) unless there was a source of income separate from the K-1 in which case that income is included in Column B. There is the potential for double counting income. However, according to a Financial Disclosure Examiner, it is better to over report than to under report.

If a Partnership was terminated or a portfolio company deemed worthless in 2024, either same is stated in Column 1 or "Y" is noted, with no year-end value reported.

VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

NOTE 10: There are several Sentinel Funds including Sentinel V, VI and VII (combined into one Line with all portfolio companies listed below it) and the Continuation Fund. When there are both limited partner and general partner interests, the K-1 information for both interests is combined and included on the line. This approach matches the way the Funds' portfolio companies are included on this report.

Each year, there are K-1s issued for these partnerships. The K-1s summarize all of the ordinary income (loss), portfolio income, capital gains/losses, etc., for all of the underlying companies. All amounts were netted together. If the net amount was larger than the required income threshold, that amount was included in Column B.(1) with Column B.(2) noting "Distribution." If the K-1 activity netted to a loss, then "None" is included in Column B.(2). Since all K-1 activity is accounted for at the partnership level, the underlying companies which are listed separately do not show any income in Column B.(1) (unless the Filer received notice that certain distributions were for current income from a specific portfoflio company in which case it is included in Column B). See NOTE 9 for additional information.

NOTE 11: Either this investment was sold or the private equity fund LP was dissolved in a prior year. So, although the reporting [redacted] received distributions (e.g. escrow, dividends, etc) and/or a K-1, there is no year-end value to report. If the entity issued a K-1, any income, including capital gains, was summed and included in Column B.(1) with Column B.(2) noting "Distribution.". To avoid double-counting, capital gains are not inlcuded in Column D.4. If there was no K-1 issued, any amounts received from investments sold in a prior year are considered capital gains and are included as such in this report.

NOTE 12: Carried interest allocation is due to a relationship with the original Vestar funds not because the reporting [redacted] made an investment in the entity. Since there is no investment in this partnership, there is no year-end value to report.

NOTE 13: The filer's [redacted] is the sole shareholder of this S Corporation. The company's assets are limited to office furniture, office equipment, a checking account and a money market account. The value used to determine the year-end valuation code was the checking/money market account balances, A/R and the office furniture and equipment balance (less accumulated depreciation).

NOTE 14: Received information from the Fund subsequent to the initial filing of 2024 Report that the Fund either wrote off, wrote the value down to zero, or decreased the value of this investment as of 12/31/2024. Hence, the information included in Columns C. (1) and C. (2) has been either removed or adjusted.

NOTE 15: Brown Advisory Private Equity Fund has 12 portfolio companies, namely, Accel, Altamont, Andreessen Horowitz, Dimension Capital, Forerunner Partners, Iron Path Capital, Linden Capital, Root Ventures, Sterling group Partners, The LegalTech Fund, Thrive Capital and Trivest. The portfolio companies are only listed if the year-end market value reaches the reporting threshold. Any income is noted on the Fund line. All investments in the Private Equity Fund are noted as "Buy" under the Fund line. Reporting person did not receive any information regarding when investments were made and the related costs. As such, "X" was used to list the reportable portfolio companies with no transactions noted. Companies listed are from a report specifically requested from the entity for year-end market values.

NOTE 16: Gains/Losses on Foundation activity are included on a tax basis.

NOTE 17: In prior year reports, this item was included in "Other." Due to a Letter of Inquiry from the Committee, we requested additional information from the Fund and we separated out assets in the "Other" category.

NOTE 18: In the 2024 FDR filed in 5/2025, preparer extrapolated information from company supplied reports because investor-specific information is not supplied. However, due to a Letter of Inquiry from the Committee, preparer requested addtional inforation from the Fund. Assets with balances over $1,000 are the ones with the (X). Asset descritpions that no longer apply are marked with a (Y).

NOTE 19: The reporting person's spouse has a beneficial interest in this trust. Therefore, its assets are deemed reportable.

NOTE 20: In prior year reports, this item was called "Other." After receiving a Letter of Inquiry, preparer reached out to the Fund and learned this is actually cash.

NOTE 21: Per a Letter of Inquity from the Committee regarding the 2024 Report, in this amended report preparer has moved all money market fund activity to the individual investment accounts.

NOTE 22: NOT USED.

NOTE 23: Preparer reached out to Tinicum for a breakdown. However, Tinicum was not able to breakdown the cash between Goldman and Citibank.

NOTE 24: NOT USED.

NOTE 25: If there is no year-end market value, the remaining shares were sold on various dates throughout the year, none of which were reportable (sales were under reporting threshold). If there is a year-end market value, with no associated transaction(s), the shares were purchased on various dates throughout the year, none of which were reportable (purchases were under the reporting threshold).

NOTE 26: The Fund makes capital calls and then invests those amounts in portfolio companies. Preparer requested a report from the entity that broke out the capital calls by portfolio company. By showing the capital calls and then also the portfolio company investments, there is double counting. Any income for the underlying assets is included in the Fund's 2024 K-1 and hence is reported in the Fund's line on this report. Preparer included the year-end market value for the Parternship and also the underlying portfolio companies.

Name of Person Reporting	Date of Report
Wood, Kimba M.	10/06/2025

IX. CERTIFICATION.

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. app. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Kimba M. Wood

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 104)

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