Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Cabranes, Jose A.
U.S. Court of Appeals - Second Circuit
Senior Circuit Judge

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. Â§ 13141 et. seq., 5 U.S.C. Â§ 7353, and Judicial Conference regulations.

/s/ Cabranes, Jose A. [electronically signed on Jul 10, 2026 2:49pm by Cabranes, Jose A. in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	George Washington University	University/College	Member
	Additional Explanation: Academic Advisory Committee of the Institute for Constitutional Studies		
2.	Academia Puertorriquena de Jurisprudencia y Legislacion	Non-Profit	Honorary Fellow
3.	Colgate University	University/College	Member
	Additional Explanation: External Advisory Board, Colgate University's Center for Freedom and Western Civilization		
4.	Board of Editors, Journal of Free Speech	Non-Profit	Member
5.	American Law Institute	Non-Profit	Advisor
	Additional Explanation: Restatement of the Law Fourth - Foreign Relations Law of the United States		

II. Agreements

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

III A. Filer Non-Investment Income

I do not have any Filer Non-Investment Income to report
No entries in this section

III B. Spouse Non-Investment Income

I do not have any Spouse Non-Investment Income to report
No entries in this section

IV. Reimbursements

SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED

	SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	University of Notre Dame	Jun 21, 2025	Jun 29, 2025	Dublin, Ireland	Conference	Transportation, meals, lodging

V. Gifts

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

VI. Liabilities

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

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**(H) Individual Assets**				
1-A.	Citizens Bank (cash)	$1,000 or less	Interest	$100,001 - $250,000	Cash/Market
2.	**(H) Account #1**				
2-A.	TIAA Bank (cash)	$2,501 - $5,000	Interest	$15,001 - $50,000	Cash/Market
2-B.	Goldman Sachs Financial Square Treasury Solutions Fd (FEDXX) (ca	$2,501 - $5,000	Dividend	$15,000 or less	Cash/Market
2-C.	United States Treasury Note	$2,501 - $5,000	Interest	$250,001 - $500,000	Cash/Market
2-D.	SPDR Portfolio S&P 500 Value ETF (SPYV)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 7, 2025	$15,001 - $50,000
(3).	Buy (add'l)	May 21, 2025	$15,000 or less
(4).	Buy (add'l)	May 28, 2025	$15,000 or less
(5).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(6).	Buy (add'l)	Jun 11, 2025	$15,000 or less
(7).	Buy (add'l)	Jun 18, 2025	$15,000 or less
(8).	Buy (add'l)	Jul 10, 2025	$15,000 or less
(9).	Buy (add'l)	Nov 28, 2025	$15,000 or less
(10).	Buy (add'l)	Dec 29, 2025	$15,000 or less

2-E.	SPDR S&P 500 Growth ETF (SPYG)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 7, 2025	$15,001 - $50,000
(3).	Buy (add'l)	May 21, 2025	$15,001 - $50,000
(4).	Buy (add'l)	May 28, 2025	$15,000 or less
(5).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(6).	Buy (add'l)	Jun 11, 2025	$15,000 or less
(7).	Buy (add'l)	Jun 18, 2025	$15,000 or less

2-F.	Vanguard Small-Cap Growth ETF (VBK)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-G.	Vanguard Small-Cap Value ETF (VBR)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 3, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 24, 2025	$15,000 or less
(3).	Buy (add'l)	Aug 29, 2025	$15,000 or less
(4).	Buy (add'l)	Oct 8, 2025	$15,000 or less
(5).	Sold (part)	Nov 13, 2025	$15,000 or less
(6).	Sold (part)	Nov 28, 2025	$15,000 or less

2-H.	Blackrock Advantage International Fund (BROIX)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 7, 2025	$15,001 - $50,000
(3).	Buy (add'l)	May 21, 2025	$15,000 or less
(4).	Buy (add'l)	May 28, 2025	$15,000 or less
(5).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(6).	Buy (add'l)	Jun 11, 2025	$15,000 or less
(7).	Buy (add'l)	Jun 18, 2025	$15,000 or less
(8).	Buy (add'l)	Dec 29, 2025	$15,000 or less

2-I.	Hartford Emerging Markets Equity Fund (HERFX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,000 or less
(2).	Buy (add'l)	May 7, 2025	$15,000 or less
(3).	Buy (add'l)	May 21, 2025	$15,000 or less
(4).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(5).	Buy (add'l)	Jun 11, 2025	$15,000 or less

2-J.	Schwab International Small-Cap Equity ETF (SCHC)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,000 or less
(2).	Buy (add'l)	May 7, 2025	$15,000 or less
(3).	Buy (add'l)	May 21, 2025	$15,000 or less
(4).	Buy (add'l)	Jun 4, 2025	$15,000 or less

2-K.	Pimco Emerging Markets Bond Fund (PEBIX)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	May 7, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 21, 2025	$15,000 or less
(3).	Buy (add'l)	May 28, 2025	$15,000 or less
(4).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(5).	Buy (add'l)	Jun 11, 2025	$15,000 or less
(6).	Buy (add'l)	Nov 13, 2025	$15,001 - $50,000

2-L.	Pimco International Bond Fund U.S. Dollar-Hedged (PFORX)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	May 7, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 21, 2025	$15,000 or less
(3).	Buy (add'l)	May 28, 2025	$15,000 or less
(4).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(5).	Buy (add'l)	Jun 11, 2025	$15,000 or less
(6).	Buy (add'l)	Aug 29, 2025	$15,000 or less



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
2-M.	iShares Broad USD High Yield Corporate Bond ETF (USHY)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,000 or less
(2).	Buy (add'l)	May 7, 2025	$15,000 or less
(3).	Buy (add'l)	May 21, 2025	$15,000 or less
(4).	Buy (add'l)	May 28, 2025	$15,000 or less
(5).	Buy (add'l)	Jun 18, 2025	$15,000 or less
(6).	Buy (add'l)	Jul 10, 2025	$15,000 or less

2-N.	iShares Broad USD Investment Grade Corporate Bond ETF (USIG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 7, 2025	$15,000 or less
(2).	Buy (add'l)	Nov 20, 2025	$15,000 or less

2-O.	iShares MBS ETF (MBB)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 7, 2025	$15,000 or less
(2).	Buy (add'l)	Nov 20, 2025	$15,000 or less

2-P.	iShares U.S. Treasury Bond ETF (GOVT)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 7, 2025	$15,000 or less
(2).	Buy (add'l)	Nov 20, 2025	$15,000 or less

2-Q.	Vanguard Intermediate-Term Bond Index Fund (VBILX)	$2,501 - $5,000	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,000 or less
(2).	Buy (add'l)	May 7, 2025	$15,001 - $50,000
(3).	Buy (add'l)	May 21, 2025	$15,001 - $50,000
(4).	Buy (add'l)	May 28, 2025	$15,001 - $50,000
(5).	Buy (add'l)	Jun 4, 2025	$15,001 - $50,000
(6).	Buy (add'l)	Jun 11, 2025	$15,001 - $50,000
(7).	Buy (add'l)	Jun 18, 2025	$15,000 or less
(8).	Buy (add'l)	Jul 10, 2025	$15,000 or less
(9).	Sold (part)	Jul 22, 2025	$15,001 - $50,000
(10).	Buy (add'l)	Jul 24, 2025	$15,000 or less
(11).	Sold (part)	Aug 8, 2025	$15,001 - $50,000
(12).	Sold (part)	Sep 2, 2025	$15,001 - $50,000
(13).	Sold (part)	Nov 14, 2025	$15,000 or less

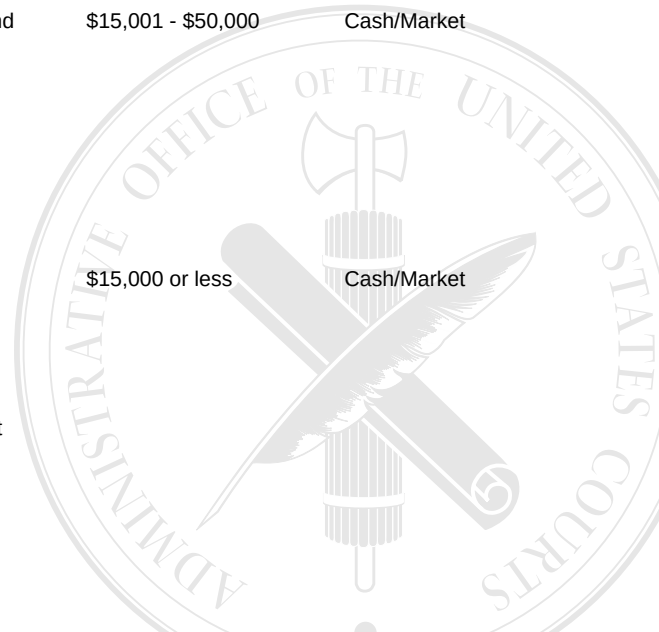
2-R.	Vanguard Short-Term Bond Index Fund (VBIRX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(2).	Buy (add'l)	Jun 18, 2025	$15,000 or less
(3).	Buy (add'l)	Dec 1, 2025	$15,000 or less
(4).	Buy (add'l)	Dec 16, 2025	$15,000 or less

2-S.	HSBC Holdings PLC 4.6190% 06 Nov 2031 Corporate Bond		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Oct 30, 2025	$15,000 or less

2-T.	HSBC Holdings PLC Variable 4.899% 03 Mar 2029 Corporate Bond	$1,000 or less	Interest		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 27, 2025	$15,000 or less
(2).	Sold	Oct 31, 2025	$15,000 or less

2-U.	Alphabet Inc Note 4.700% 15 Nov 2035 Corporate Bond		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Nov 3, 2025	$15,000 or less

2-V.	Apple Inc 1.2% 08 Feb 2028 Corporate Bond	$1,000 or less	Interest	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 11, 2025	$15,000 or less

2-W.	AT&T Inc 4.55% 01 Nov 2032 Corporate Bond		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 18, 2025	$15,000 or less
(2).	Buy (add'l)	Nov 5, 2025	$15,000 or less

2-X.	Barclays PLC 2.984% 24 Nov 2032 Corporate Bond	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

2-Y.	BP Capital Markets America Inc 1.749% 10 Aug 2030 Corporate Bond	$1,000 or less	Interest	$15,000 or less	Cash/Market

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

2-Z.	Citigroup Inc Variable 5.174% 13 Feb 2030 Corporate Bond	$1,000 or less	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 8, 2025	$15,000 or less
(2).	Sold	Nov 5, 2025	$15,000 or less

2-AA.	CVS Health Corp 1.75% 21 Aug. 2030 Corporate Bond	$1,000 or less	Interest	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 17, 2025	$15,000 or less

2-AB.	Dell International LLC/ EMC Corp 4.75% 01 Apr 2028 Corporate Bon	$1,000 or less	Interest	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 11, 2025	$15,000 or less

2-AC.	Goldman Sachs Group Inc/The Variable 5.049% 23 Jul 2030 Corp Bnd		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 8, 2025	$15,000 or less

2-AD.	Intl Bank for Recon & Dev. 3.5% 12 Jul 2028 Corporate Bond		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 19, 2025	$15,000 or less

2-AE.	JPMorgan Chase & Co Variable 5.04% 23 Jan 2028 Corporate Bond		None	$15,000 or less	Cash/Market

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

2-AF.	Lowe's Cos Inc 1.3% 15 Apr 2028 Corporate Bond		None		

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 2, 2025	$15,000 or less
(2).	Sold	Sep 24, 2025	$15,000 or less

2-AG.	Lowe's Cos Inc 4.25% 15 Mar 2031 Corporate Bond		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 23, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 24, 2025	$15,000 or less

2-AH.	Merck & Co Inc 4.3% 17 May 2030 Corporate Bond	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 15, 2025	$15,000 or less
(2).	Sold (part)	Sep 19, 2025	$15,000 or less

2-AI.	Morgan Stanley Variable 5.192% 17 Apr 2031 Corporate Bond	$1,000 or less	Interest,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 11, 2025	$15,000 or less
(2).	Sold	Oct 20, 2025	$15,000 or less

2-AJ.	Morgan Stanley Variable 4.356% 22 Oct 2031 Corporate Bond		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Oct 17, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 9, 2025	$15,000 or less

2-AK.	PepsiCo Inc 4.5% 17 Jul 2029 Corporate Bond	$1,000 or less	Interest,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 11, 2025	$15,000 or less
(2).	Sold	Jul 21, 2025	$15,000 or less

2-AL.	PepsiCo Inc 4.65% 23 Jul 2032 Corporate Bond		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 21, 2025	$15,000 or less

2-AM.	Simon Property Group LP 5.125% 01 Oct 2035 Corporate Bond		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 12, 2025	$15,000 or less
(2).	Buy (add'l)	Aug 18, 2025	$15,000 or less

2-AN.	Simon Property Group LP 2.65% 01 Feb 2032 Corporate Bond	$1,000 or less	Interest,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 17, 2025	$15,000 or less
(2).	Sold	Aug 12, 2025	$15,000 or less

2-AO.	TN Valley Authority 3.875% 01 Aug 2030 Corporate Bond		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 5, 2025	$15,000 or less
(2).	Buy (add'l)	Aug 18, 2025	$15,000 or less

2-AP.	TN Valley Authority 3.875% 15 Mar 2028 Corporate Bond	$1,000 or less	Interest,Gain		

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 17, 2025	$15,000 or less
(2).	Sold	Aug 6, 2025	$15,000 or less

2-AQ.	Toyota Motor Credit Corp 4.35% 08 Oct 2027 Corporate Bond	$1,000 or less	Interest	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 11, 2025	$15,000 or less

2-AR.	Wells Fargo & Co Variable 5.244% 24 Jan 2031 Corporate Bond		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 8, 2025	$15,000 or less

3.	**(H) Account #2**				
3-A.	TIAA Traditional Fixed Annuity	$100,001 - $1,000,000	Interest	$1,000,001 - $5,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 31, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 31, 2025	$15,000 or less
(4).	Buy (add'l)	May 1, 2025	$15,000 or less
(5).	Buy (add'l)	May 30, 2025	$15,000 or less
(6).	Buy (add'l)	Jun 30, 2025	$15,000 or less
(7).	Buy (add'l)	Jul 31, 2025	$15,000 or less
(8).	Buy (add'l)	Aug 29, 2025	$15,000 or less
(9).	Buy (add'l)	Sep 30, 2025	$15,000 or less
(10).	Buy (add'l)	Oct 31, 2025	$15,000 or less
(11).	Buy (add'l)	Nov 26, 2025	$15,000 or less
(12).	Buy (add'l)	Dec 23, 2025	$15,000 or less

3-B.	Vanguard Total Stock Market Index Fund Inst. Plus	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
3-C.	TIAA Real Estate		None	$100,001 - $250,000	Cash/Market

4.	**(H) Account #3**				
4-A.	TIAA Traditional Fixed Annuity	$5,001 - $15,000	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Dec 10, 2025	$100,001 - $250,000

5.	**(H) Account #4**				
5-A.	TIAA Traditional Fixed Annuity	$5,001 - $15,000	Interest	$250,001 - $500,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 31, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 31, 2025	$15,000 or less
(4).	Buy (add'l)	May 1, 2025	$15,000 or less
(5).	Buy (add'l)	May 30, 2025	$15,000 or less
(6).	Buy (add'l)	Jun 30, 2025	$15,000 or less
(7).	Buy (add'l)	Jul 31, 2025	$15,000 or less
(8).	Buy (add'l)	Aug 29, 2025	$15,000 or less
(9).	Buy (add'l)	Sep 30, 2025	$15,000 or less
(10).	Buy (add'l)	Oct 31, 2025	$15,000 or less
(11).	Buy (add'l)	Nov 26, 2025	$15,000 or less
(12).	Buy (add'l)	Dec 23, 2025	$15,000 or less

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
5-B.	Vanguard Total Stock Market Index Fund Inst. Plus	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
6.	**(H) Account #5**				
6-A.	TIAA Real Estate		None	$250,001 - $500,000	Cash/Market
6-B.	TIAA Traditional Fixed Annuity	$5,001 - $15,000	Interest	$100,001 - $250,000	Cash/Market
7.	**(H) Account #6**				
7-A.	TIAA Bank (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
7-B.	iShares Russell 2000 Growth ETF (IWO)	$2,501 - $5,000	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 26, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$15,000 or less
(3).	Sold (part)	Jun 4, 2025	$15,000 or less
(4).	Sold (part)	Oct 8, 2025	$15,000 or less
(5).	Sold (part)	Nov 13, 2025	$15,000 or less

7-C.	iShares Russell 2000 Value ETF (IWN)	$2,501 - $5,000	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 26, 2025	$15,000 or less
(2).	Sold (part)	Jun 4, 2025	$15,000 or less
(3).	Sold (part)	Nov 13, 2025	$15,000 or less

7-D.	iShares Russell Mid-Cap Growth ETF (IWP)	$2,501 - $5,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 26, 2025	$15,000 or less
(2).	Sold (part)	Aug 29, 2025	$15,000 or less
(3).	Sold (part)	Oct 8, 2025	$15,000 or less
(4).	Sold (part)	Nov 13, 2025	$15,000 or less

7-E.	iShares Russell Mid-Cap Value ETF (IWS)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 26, 2025	$15,000 or less
(2).	Sold (part)	Oct 8, 2025	$15,000 or less

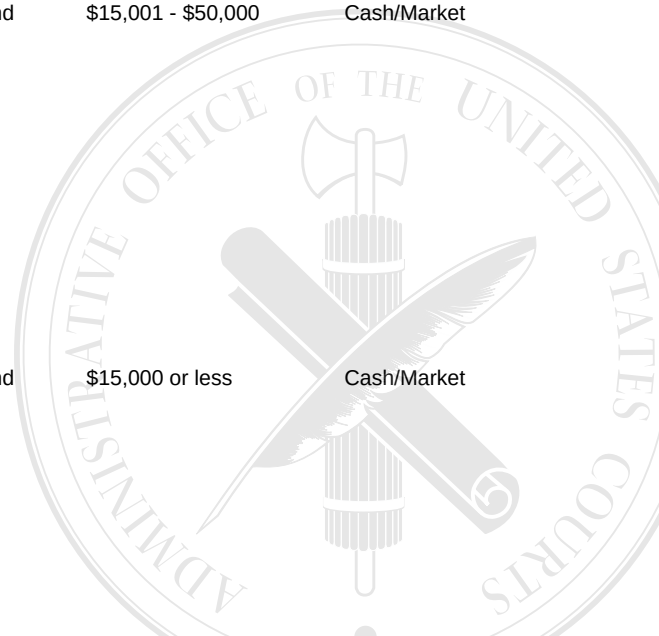
7-F.	TIAA-CREF Large Cap Growth Index (TILIX)	$5,001 - $15,000	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	May 20, 2025	$15,000 or less
(2).	Sold (part)	Jun 4, 2025	$15,000 or less
(3).	Sold (part)	Jul 10, 2025	$15,000 or less

7-G.	Blackrock Advantage International Fd (BROIX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 26, 2025	$15,000 or less
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(4).	Buy (add'l)	Aug 29, 2025	$15,000 or less
(5).	Buy (add'l)	Oct 8, 2025	$15,000 or less
(6).	Buy (add'l)	Nov 13, 2025	$15,000 or less
(7).	Buy (add'l)	Dec 29, 2025	$15,000 or less

7-H.	Hartford Emerging Markets Equity Fd (HERFX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 26, 2025	$15,000 or less
(2).	Buy (add'l)	May 20, 2025	$15,000 or less
(3).	Buy (add'l)	Oct 8, 2025	$15,000 or less

7-I.	iShares MSCI EAFE Small Cap ETF (SCZ)	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 26, 2025	$15,000 or less
(2).	Sold (part)	Aug 29, 2025	$15,000 or less

7-J.	NYLI Mackay Tax Free Bond Fd (MTBDX)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 26, 2025	$100,001 - $250,000
(2).	Sold	May 20, 2025	$100,001 - $250,000
(3).	Buy	Aug 29, 2025	$100,001 - $250,000
(4).	Buy (add'l)	Nov 13, 2025	$15,000 or less

7-K.	Bernstein Diversified Municipal Portfolio (SNDPX)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 26, 2025	$15,000 or less

7-L.	Allspring Ultra Short-Term Municipal Income Fund Inst Class (SMA	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 26, 2025	$15,000 or less

7-M.	Allspring Municipal Bond Fund Inst Class (WMBIX)	$1,001 - $2,500	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 26, 2025	$100,001 - $250,000
(2).	Buy (add'l)	May 20, 2025	$100,001 - $250,000
(3).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(4).	Buy (add'l)	Jul 10, 2025	$15,000 or less
(5).	Sold	Aug 29, 2025	$100,001 - $250,000

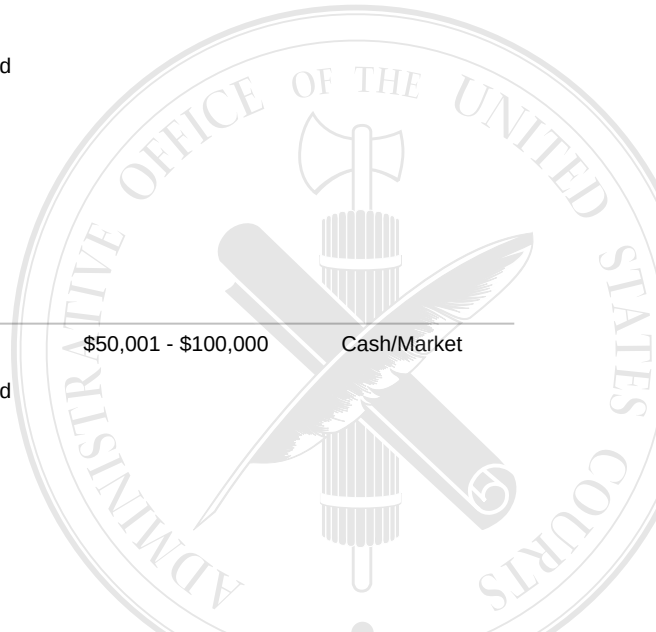
8.	**(H) Account #7**				
8-A.	Vanguard Lifestrategy Conservative Growth Investor Cl (VSCGX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
8-B.	TIAA Bank (cash)	$1,000 or less	Interest	$100,001 - $250,000	Cash/Market
8-C.	Goldman Sachs Financial Square Treasury Solutions Fd (FEDXX) (ca	$1,000 or less	Interest	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Dec 29, 2025	$100,001 - $250,000

8-D.	Vanguard Federal Money Market Fund (VMFXX)	$5,001 - $15,000	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jun 3, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Aug 1, 2025	$50,001 - $100,000
(3).	Sold	Dec 23, 2025	$250,001 - $500,000

9.	**(H) Account #8**				
9-A.	TIAA Bank (cash)	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
9-B.	Bernstein Diversified Municipal Portfolio (SNDPX)	$1,000 or less	Dividend		



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 26, 2025	$15,000 or less

9-C.	TIAA-CREF Large Cap Growth Index (TILIX)	$5,001 - $15,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jun 4, 2025	$15,000 or less
(2).	Sold (part)	Jun 18, 2025	$15,000 or less
(3).	Sold (part)	Jul 10, 2025	$15,000 or less
(4).	Sold (part)	Jul 24, 2025	$15,000 or less
(5).	Sold (part)	Aug 29, 2025	$15,000 or less
(6).	Sold (part)	Oct 8, 2025	$15,000 or less

9-D.	Blackrock Advantage International Fund (BROIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 26, 2025	$15,000 or less

9-E.	Allspring Municipal Bond Fund (WMBRX)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 20, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(3).	Buy (add'l)	Jun 18, 2025	$15,000 or less
(4).	Buy (add'l)	Jul 10, 2025	$15,000 or less
(5).	Sold	Aug 29, 2025	$50,001 - $100,000

9-F.	Allspring Ultra Short-Term Municipal Income Fund Inst Class (SMA	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 26, 2025	$15,000 or less

9-G.	NYLI Mackay Tax Free Bond Fund (MTBDX)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 26, 2025	$50,001 - $100,000
(2).	Sold (part)	May 20, 2025	$15,001 - $50,000
(3).	Buy (add'l)	Jul 24, 2025	$15,000 or less
(4).	Buy (add'l)	Aug 29, 2025	$50,001 - $100,000
(5).	Buy (add'l)	Oct 8, 2025	$15,000 or less
(6).	Buy (add'l)	Dec 29, 2025	$15,000 or less

9-H.	iShares Russell Mid-Cap Value ETF (IWS)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
9-I.	iShares Russell Mid-Cap Growth ETF (IWP)	$5,001 - $15,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 26, 2025	$15,000 or less
(2).	Sold (part)	May 20, 2025	$15,000 or less

9-J.	iShares Russell 1000 Value ETF (IWD)	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
9-K.	iShares Russell 1000 Growth ETF (IWF)	$1,001 - $2,500	Dividend	$250,001 - $500,000	Cash/Market
9-L.	iShares Russell 2000 Value ETF (IWN)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
9-M.	iShares Russell 2000 Growth ETF (IWO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
9-N.	iShares MSCI EAFE Small Cap ETF (SCZ)	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 26, 2025	$15,000 or less

9-O.	Hartford Emerging Markets Equity Fund (HERFX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Buy	Mar 26, 2025	$15,000 or less	
	(2).	Buy (add'l)	May 20, 2025	$15,000 or less	
	(3).	Buy (add'l)	Aug 29, 2025	$15,000 or less	
9-P.	iShares TR Core MSCI EAFE ETF (IEFA)	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
9-Q.	iShares Core MSCI Emerging Markets ETF (IEMG)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

VIII. Additional Information or Explanations

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