Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Ebel, David M.
U.S. Court of Appeals - Tenth 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/ Ebel, David M. [electronically signed on Sep 17, 2026 5:13pm by Ebel, David M. in JEFS]
/s/ Ebel, David M. [electronically signed on Jul 2, 2026 4:44pm by Ebel, David M. in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Trust #1	Trust	Trustee

Additional Explanation: No reportable assets.

II. Agreements

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

III A. Filer Non-Investment Income

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

III B. Spouse Non-Investment Income

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	Colorado Public Employees Retirement Association (CoPERA)	Fixed Retirement / Pension Benefits	No	$0.00	

IV. Reimbursements

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

V. Gifts

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

VI. Liabilities

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

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**Northwestern Mutual Modified Whole Life Policies**	$15,001 - $50,000	Interest	$100,001 - $250,000	Cash/Market
2.	**Mass. Mutual Whole Life Policy**	$2,501 - $5,000	Interest	$15,001 - $50,000	Cash/Market
3.	**Thrivant Lutheran Brotherhood Whole Life Policy**	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
4.	**Open Intelligence Software Group, Inc. Class A Common Stock**	$1,000 or less	Dividend		

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

5.	**(H) IRA #1 (H)**				
5-A.	Janus Henderson Money Market Fund D Shares	$5,001 - $15,000	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 25, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Apr 7, 2025	$50,001 - $100,000
(3).	Sold (part)	Nov 11, 2025	$15,001 - $50,000
(4).	Sold (part)	Dec 5, 2025	$100,001 - $250,000

5-B.	Janus Henderson Forty Fund D Shares	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 7, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Dec 5, 2025	$50,001 - $100,000

5-C.	Janus Henderson Enterprise Fund D Shares	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 7, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 5, 2025	$15,001 - $50,000

5-D.	Janus Henderson Global Real Estate Fund D Shares	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-E.	Janus Henderson Global Tech & Innovation D Shares	$15,001 - $50,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 25, 2025	$50,001 - $100,000
(2).	Sold (part)	Apr 7, 2025	$15,001 - $50,000
(3).	Buy (add'l)	Dec 5, 2025	$15,001 - $50,000

6.	**(H) Brokerage #1**				
6-A.	Select Sector SPDR Trust Technology (XLK)	$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). Sold (part) Jun 3, 2025 $15,000 or less				
	(2). Sold (part) Jul 11, 2025 $15,000 or less				
6-B.	Fidelity Intl Cap Appreciation Fund (FICQX)	$2,501 - $5,000	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Nov 4, 2025 $15,000 or less				
6-C.	Fidelity Emerging Markets (FEMKX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-D.	Fidelity International Index Fund (FSPSX)	$1,000 or less	Dividend,Gain	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Mar 18, 2025 $15,000 or less				
	(2). Sold (part) May 5, 2025 $15,000 or less				
6-E.	Fidelity Extended Market Index Fund (FSMAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-F.	Fidelity 500 Index Fund (FXAIX)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
6-G.	Fidelity Large Cap Stock (FLCSX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
6-H.	Fidelity Adv Focused Emerg Mkts Z (FZAEX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-I.	Fidelity Emerging Markets Index Fund (FPADX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-J.	Fidelity Growth Company (FDGRX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
6-K.	Fidelity Overseas (FOSFX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
6-L.	Fidelity Value Discovery (FVDFX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 16, 2025 $15,000 or less				
	(2). Sold (part) May 5, 2025 $15,000 or less				
	(3). Sold (part) Nov 4, 2025 $15,000 or less				
6-M.	Fidelity Limited Term Muni Income Fd (FSTFX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-N.	Fidelity SAI Tax Free Bond Fund (FSAJX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 16, 2025 $15,000 or less				
6-O.	Fidelity International Value Factor ETF (FIVA)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-P.	Ishares Core S&P Mid-Cap ETF (IJH)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Sep 2, 2025 $15,000 or less				
6-Q.	Ishares S&P Mid-Cap 400 Growth ETF (IJK)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-R.	Ishares Tr US Treas Bd ETF (GOVT)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 29, 2025 $15,000 or less				
	(2). Sold (part) Mar 18, 2025 $15,000 or less				
6-S.	Ishares Tr MSCI EAFE Min VL (EFAV)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-T.	Ishares Tr MSCI USA Min Vol (USMV)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-U.	Ishares Tr MSCI USA QLT FCT (QUAL)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
6-V.	Ishares Tr MSCI Intl Vlu FT (IVLU)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-W.	Schwab Fundamental EM L/C (FNDE)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jan 29, 2025 $15,000 or less				
	(2). Sold (part) Apr 16, 2025 $15,000 or less				
6-X.	Fidelity Government Cash Reserves (FDRXX)	$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).	Sold (part)	Jan 24, 2025	$15,000 or less
(2).	Buy (add'l)	Jan 29, 2025	$15,000 or less
(3).	Sold (part)	Feb 21, 2025	$15,000 or less
(4).	Sold (part)	Apr 3, 2025	$15,000 or less
(5).	Buy (add'l)	Apr 16, 2025	$15,000 or less
(6).	Sold (part)	Apr 28, 2025	$15,000 or less
(7).	Buy (add'l)	May 5, 2025	$15,000 or less
(8).	Sold (part)	Jul 11, 2025	$15,000 or less
(9).	Buy (add'l)	Jul 22, 2025	$15,000 or less
(10).	Sold (part)	Oct 2, 2025	$15,000 or less
(11).	Sold (part)	Oct 24, 2025	$15,000 or less
(12).	Buy (add'l)	Nov 4, 2025	$15,000 or less
(13).	Sold (part)	Nov 14, 2025	$15,000 or less
(14).	Buy (add'l)	Nov 18, 2025	$15,000 or less
(15).	Buy (add'l)	Dec 19, 2025	$15,000 or less
(16).	Buy (add'l)	Dec 26, 2025	$15,000 or less

6-Y.	Fidelity SAI Conservative Income Muni Bond Fd (FSMJX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-Z.	Fidelity Real Estate Investment (FRESX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

6-AA.	Fidelity Intern'tl Small Cap (FISMX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
6-AB.	Fidelity Contrafund (FCNTX)	$5,001 - $15,000	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 18, 2025	$15,000 or less
(2).	Sold	May 5, 2025	$15,000 or less

6-AC.	Fidelity Inter Mediate MUNI Income (FLTMX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

6-AD.	FID SAI Enhanced MUNI Income Fund (FENCX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 11, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 2, 2025	$15,000 or less
(3).	Buy (add'l)	Oct 2, 2025	$15,000 or less

7. **(H) IRA #2 (H)**

7-A.	Fidelity SAI Inflation Focused Fd (FIFGX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 25, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 17, 2025	$15,000 or less

7-B.	Strategic Advisers Fid Emerging Markets (FGOMX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 7, 2025	$15,000 or less
(2).	Sold (part)	Mar 3, 2025	$15,000 or less
(3).	Sold (part)	Mar 25, 2025	$15,000 or less
(4).	Buy (add'l)	Mar 27, 2025	$15,000 or less
(5).	Sold (part)	Oct 27, 2025	$15,000 or less
(6).	Buy (add'l)	Nov 26, 2025	$15,000 or less

7-C.	Strategic Advisers Fid US Total Stock (FCTDX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 3, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Mar 7, 2025	$15,000 or less
(3).	Sold (part)	Mar 25, 2025	$50,001 - $100,000
(4).	Buy (add'l)	Mar 27, 2025	$15,000 or less
(5).	Sold (part)	Apr 7, 2025	$15,000 or less
(6).	Sold (part)	May 8, 2025	$15,000 or less
(7).	Sold (part)	Jun 4, 2025	$15,000 or less
(8).	Sold (part)	Jun 30, 2025	$15,000 or less
(9).	Sold (part)	Sep 29, 2025	$15,000 or less
(10).	Sold (part)	Oct 27, 2025	$15,000 or less
(11).	Sold (part)	Nov 26, 2025	$15,000 or less

7-D. Strategic Advisers Fidelity Intl Fund (FUSIX) — $1,001 - $2,500 — Dividend — $50,001 - $100,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 7, 2025	$15,000 or less
(2).	Sold (part)	Mar 3, 2025	$15,000 or less
(3).	Sold (part)	Mar 7, 2025	$15,000 or less
(4).	Sold (part)	Mar 25, 2025	$15,001 - $50,000
(5).	Buy (add'l)	Mar 27, 2025	$15,000 or less
(6).	Sold (part)	May 8, 2025	$15,000 or less
(7).	Sold (part)	Jun 4, 2025	$15,000 or less
(8).	Sold (part)	Oct 27, 2025	$15,000 or less
(9).	Buy (add'l)	Nov 26, 2025	$15,000 or less
(10).	Sold (part)	Dec 17, 2025	$15,000 or less

7-E. Fidelity SAI Emerging Markets Index (FERGX) — $1,000 or less — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 7, 2025	$15,000 or less

7-F. Fidelity Advisor Strategic Inc Cl I (FSRIX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

7-G. Fidelity Capital & Income (FAGIX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

7-H. Fidelity SAI Short Term Bond Fund (FZOMX) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 25, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Mar 27, 2025	$15,000 or less
(3).	Sold (part)	Jun 30, 2025	$15,000 or less
(4).	Sold (part)	Aug 8, 2025	$15,000 or less
(5).	Sold (part)	Oct 27, 2025	$15,000 or less
(6).	Sold (part)	Nov 26, 2025	$15,000 or less

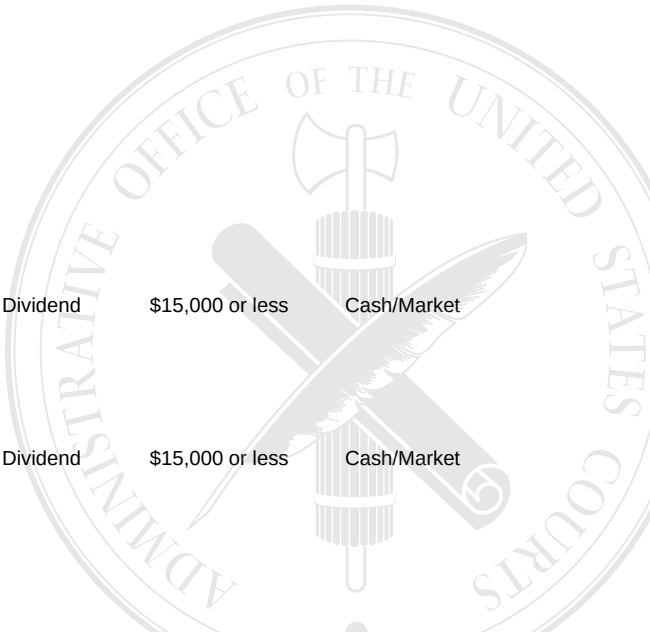
7-I. Fidelity SAI Low Duration Bond Fund (FZOLX) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 7, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 25, 2025	$15,001 - $50,000
(3).	Buy (add'l)	Mar 27, 2025	$15,000 or less
(4).	Sold (part)	Apr 16, 2025	$15,000 or less
(5).	Buy (add'l)	May 8, 2025	$15,000 or less
(6).	Sold (part)	Jun 30, 2025	$15,000 or less
(7).	Sold (part)	Aug 8, 2025	$15,000 or less
(8).	Sold (part)	Oct 27, 2025	$15,000 or less
(9).	Sold (part)	Nov 26, 2025	$15,000 or less

7-J. Fid SI Long Term Treas Bond Index (FBLTX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 7, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 29, 2025	$15,000 or less

7-K. Fidelity SAI High Income Fund (FSHGX) — $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).	Sold (part)	Mar 25, 2025	$15,000 or less

7-L.	Fidelity Government Cash Reserves (FDRXX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 21, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 3, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 25, 2025	$15,001 - $50,000
(4).	Sold (part)	Mar 27, 2025	$15,001 - $50,000
(5).	Sold (part)	Apr 3, 2025	$15,000 or less
(6).	Buy (add'l)	Apr 7, 2025	$15,000 or less
(7).	Sold (part)	May 16, 2025	$15,000 or less
(8).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(9).	Sold (part)	Aug 22, 2025	$15,000 or less
(10).	Buy (add'l)	Sep 29, 2025	$15,000 or less
(11).	Buy (add'l)	Oct 27, 2025	$15,001 - $50,000
(12).	Sold (part)	Oct 27, 2025	$15,001 - $50,000
(13).	Sold (part)	Nov 14, 2025	$15,000 or less
(14).	Buy (add'l)	Nov 26, 2025	$15,000 or less

7-M.	Fidelity SAI Canada Equity Index Fund (FSCJX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 7, 2025	$15,000 or less
(2).	Sold (part)	Mar 25, 2025	$15,000 or less

7-N.	Fid SAI Real Estate Fund (FSRJX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-O.	Fid SAI Inflation Protected Bond Index (FSPWX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 7, 2025	$15,000 or less
(2).	Sold (part)	Mar 7, 2025	$15,000 or less
(3).	Buy (add'l)	Apr 16, 2025	$15,000 or less
(4).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(5).	Buy (add'l)	Dec 17, 2025	$15,000 or less

7-P.	FID SAI 0-5 Inflat-Prot BD Index (FFNYX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

7-Q.	Strategic Advisers FID Alternatives FD (FSAOX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 30, 2025	$15,000 or less
(2).	Buy (add'l)	Aug 8, 2025	$15,000 or less
(3).	Buy (add'l)	Nov 26, 2025	$15,000 or less

7-R.	Strategic Advisers Fidelity Core Income (FIWGX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 7, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 3, 2025	$50,001 - $100,000
(3).	Sold (part)	Mar 7, 2025	$15,000 or less
(4).	Buy (add'l)	Mar 25, 2025	$15,001 - $50,000
(5).	Buy (add'l)	Mar 27, 2025	$15,000 or less
(6).	Sold (part)	Apr 7, 2025	$15,000 or less
(7).	Sold (part)	Apr 16, 2025	$15,000 or less
(8).	Buy (add'l)	May 8, 2025	$15,000 or less
(9).	Buy (add'l)	Jun 4, 2025	$15,000 or less
(10).	Buy (add'l)	Jun 30, 2025	$15,000 or less
(11).	Sold (part)	Oct 27, 2025	$15,000 or less
(12).	Sold (part)	Nov 26, 2025	$15,000 or less
(13).	Sold (part)	Dec 17, 2025	$15,000 or less

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
8.	**(H) IRA #3**				
8-A.	Dodge & Cox Stock Fd.	$2,501 - $5,000	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 7, 2025	$50,001 - $100,000

8-B.	Dodge & Cox Balanced Fd.	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 5, 2025	$15,001 - $50,000

8-C.	Dodge & Cox Income Fund	$5,001 - $15,000	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Feb 25, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Apr 7, 2025	$50,001 - $100,000
(3).	Sold (part)	Nov 20, 2025	$15,000 or less
(4).	Sold (part)	Dec 5, 2025	$100,001 - $250,000

8-D.	Dodge & Cox Global Stock Fund	$5,001 - $15,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 25, 2025	$50,001 - $100,000
(2).	Sold (part)	Apr 7, 2025	$15,000 or less
(3).	Buy (add'l)	Dec 5, 2025	$50,001 - $100,000

9.	**(H) IRA #4**				
9-A.	Fidelity SAI Inflation Focused Fd (FIFGX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
9-B.	Strategic Advisers Fid Emerging Markets (FGOMX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
9-C.	Strategic Advisers Fid US Total Stock (FCTDX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
9-D.	Strategic Advisers Fidelity Intl Fund (FUSIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
9-E.	Fidelity SAI Emerging Markets Index (FERGX)	$1,000 or less	Gain		

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

9-F.	Fidelity Government Cash Reserves (FDRXX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
9-G.	Fidelity SAI Canada Equity Index Fund (FSCJX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
9-H.	Fid SAI Real Estate Fund (FSRJX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10.	**(H) Brokerage #2**				
10-A.	Fidelity MSCI Information	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-B.	Fidelity NASDAQ Composite Index	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-C.	Fidelity Core Cash Management Account	$1,000 or less	Interest	$15,000 or less	Cash/Market
10-D.	Apple Inc Com	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-E.	Costco Wholesale Corp	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-F.	Ishares Tr MSCI USA Mmentm	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-G.	Nvidia Corp	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
10-H.	Ishares Core S&P 500 ETF	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-I.	Vanguard Small Cap Value ETF (VBR)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
11.	**(H) Brokerage #3**				
11-A.	Ares Real Estate Income Trust (Y)		None		
12.	**(H) IRA #5 (H)**				
12-A.	Ishares Russell Top 200 Growth Index ETF (IWY)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 27, 2025	$15,000 or less

12-B.	Ishares DJ US Tech Sector Index ETF (IYW)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
12-C.	FT NASDAQ Rising Dvd Achievers ETF (RDVY)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
12-D.	SPDR Portfolio S&P 500 ETF (SPLG)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
12-E.	FT NASDAQ Technology Dividend Index ETF (TDIV)	$5,001 - $15,000	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Oct 27, 2025	$15,001 - $50,000

12-F.	Fidelity Government Money Market (SPAXX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 24, 2025	$15,000 or less
(2).	Buy (add'l)	Oct 27, 2025	$15,001 - $50,000
(3).	Sold (part)	Oct 27, 2025	$15,001 - $50,000

13.	**(H) Brokerage #4 (H)**				
13-A.	Select Sector SPDR Trust Technology (XLK)	$5,001 - $15,000	Dividend	$15,001 - $50,000	Cash/Market
13-B.	Fidelity Government Money Market (SPAXX)	$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 (add'l)	Jan 6, 2025	$15,000 or less
(2).	Buy (add'l)	Jan 7, 2025	$15,000 or less
(3).	Sold (part)	Jan 9, 2025	$15,000 or less
(4).	Buy (add'l)	Jan 15, 2025	$15,000 or less
(5).	Sold (part)	Jan 17, 2025	$15,000 or less
(6).	Buy (add'l)	Jan 24, 2025	$15,000 or less
(7).	Sold (part)	Jan 27, 2025	$15,000 or less
(8).	Buy (add'l)	Feb 5, 2025	$15,001 - $50,000
(9).	Sold (part)	Feb 12, 2025	$15,000 or less
(10).	Sold (part)	Feb 25, 2025	$15,001 - $50,000
(11).	Buy (add'l)	Feb 25, 2025	$15,001 - $50,000
(12).	Buy (add'l)	Feb 26, 2025	$15,000 or less
(13).	Buy (add'l)	Feb 27, 2025	$15,000 or less
(14).	Sold (part)	Mar 6, 2025	$15,000 or less
(15).	Buy (add'l)	Mar 11, 2025	$15,001 - $50,000
(16).	Sold (part)	Mar 12, 2025	$15,001 - $50,000
(17).	Buy (add'l)	Apr 3, 2025	$15,000 or less
(18).	Sold (part)	Apr 4, 2025	$15,000 or less
(19).	Buy (add'l)	Apr 28, 2025	$15,000 or less
(20).	Sold (part)	May 2, 2025	$15,000 or less
(21).	Buy (add'l)	May 6, 2025	$15,001 - $50,000
(22).	Sold (part)	May 7, 2025	$15,000 or less
(23).	Sold (part)	May 15, 2025	$15,000 or less
(24).	Buy (add'l)	May 19, 2025	$15,001 - $50,000
(25).	Sold (part)	May 21, 2025	$15,001 - $50,000
(26).	Buy (add'l)	May 22, 2025	$15,001 - $50,000
(27).	Sold (part)	Jun 3, 2025	$15,000 or less
(28).	Buy (add'l)	Jun 6, 2025	$15,000 or less
(29).	Sold (part)	Jun 23, 2025	$15,000 or less
(30).	Sold (part)	Jun 24, 2025	$15,000 or less
(31).	Buy (add'l)	Jun 25, 2025	$15,000 or less
(32).	Buy (add'l)	Jun 26, 2025	$15,001 - $50,000
(33).	Buy (add'l)	Jun 27, 2025	$15,001 - $50,000
(34).	Sold (part)	Jun 30, 2025	$15,001 - $50,000
(35).	Sold (part)	Jul 3, 2025	$15,000 or less
(36).	Sold (part)	Jul 29, 2025	$15,000 or less
(37).	Buy (add'l)	Aug 13, 2025	$15,000 or less
(38).	Sold (part)	Aug 18, 2025	$15,000 or less
(39).	Buy (add'l)	Aug 25, 2025	$15,000 or less
(40).	Sold (part)	Aug 25, 2025	$15,000 or less
(41).	Sold (part)	Aug 26, 2025	$15,000 or less
(42).	Buy (add'l)	Aug 27, 2025	$15,000 or less
(43).	Sold (part)	Aug 28, 2025	$15,000 or less
(44).	Buy (add'l)	Sep 10, 2025	$15,000 or less
(45).	Buy (add'l)	Sep 15, 2025	$15,000 or less
(46).	Sold (part)	Sep 15, 2025	$15,001 - $50,000
(47).	Sold (part)	Sep 16, 2025	$15,000 or less
(48).	Buy (add'l)	Oct 1, 2025	$15,000 or less
(49).	Sold (part)	Oct 8, 2025	$15,000 or less
(50).	Sold (part)	Oct 20, 2025	$15,000 or less
(51).	Buy (add'l)	Oct 31, 2025	$50,001 - $100,000
(52).	Sold (part)	Nov 3, 2025	$15,001 - $50,000
(53).	Buy (add'l)	Nov 4, 2025	$50,001 - $100,000
(54).	Sold (part)	Nov 5, 2025	$15,001 - $50,000
(55).	Buy (add'l)	Nov 26, 2025	$50,001 - $100,000

(56).	Sold (part)	Dec 16, 2025	$50,001 - $100,000

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
13-C.	Utilities Select Sector SPDR Fund (XLU)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 7, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 9, 2025	$15,000 or less

13-D.	Vangaurd S&P 500 Value Index Fund (VOOV)	$5,001 - $15,000	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	May 22, 2025	$15,000 or less
(2).	Sold (part)	Jun 6, 2025	$15,000 or less
(3).	Sold	Aug 13, 2025	$15,000 or less

13-E.	Exchange Traded Concepts Trust Range (NUKZ)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 27, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 12, 2025	$15,000 or less
(3).	Sold (part)	Feb 25, 2025	$15,000 or less

13-F.	Vanguard Index FDS Vanguard Value (VTV)	$1,000 or less	Dividend

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

13-G.	Vanguard World FD Industrial ETF (VIS)	$1,000 or less	Gain		

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

13-H.	ARK ETF TR Next GNRTN Inter (ARKW)	$5,001 - $15,000	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 7, 2025	$15,000 or less
(2).	Sold (part)	Feb 25, 2025	$15,000 or less
(3).	Sold	Mar 11, 2025	$15,000 or less

13-I.	Fidelity Blue Chip Growth (FBGRX)	$5,001 - $15,000	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	May 22, 2025	$15,000 or less
(2).	Sold	Jun 27, 2025	$15,000 or less

13-J.	Invesco Exchange Traded FD TR S&P (XMMO)	$5,001 - $15,000	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jan 7, 2025	$15,000 or less

13-K.	Fidelity Zero Large Cap Index Fund (FNILX)	$5,001 - $15,000	Gain		

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

13-L.	Fidelity 500 Index Fund (FXAIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 27, 2025	$15,000 or less

13-M.	Vanguard Index Funds S&P 500 ETF USD (VOO)	$1,000 or less	Gain		

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

13-N.	Ishares TR US AER DEF ETF (ITA)	$5,001 - $15,000	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 29, 2025	$15,000 or less
(2).	Sold	Aug 13, 2025	$15,000 or less

13-O.	Ishares TR Future AI & Tech (ARTY)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 30, 2025	$15,000 or less
(2).	Buy (add'l)	Oct 8, 2025	$15,000 or less

13-P.	Ishares Trust Top 20 US Stocks (TOPT)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 30, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 3, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 15, 2025	$15,000 or less

13-Q. Ishares Advantage Large Cap (BALI) — $1,000 or less — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 30, 2025	$15,000 or less
(2).	Sold	Sep 10, 2025	$15,000 or less

13-R. Global X FDS Defense Tech ETF (SHLD) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 7, 2025	$15,000 or less
(2).	Buy (add'l)	May 21, 2025	$15,000 or less
(3).	Buy (add'l)	Aug 25, 2025	$15,000 or less
(4).	Buy (add'l)	Aug 26, 2025	$15,000 or less

13-S. Fidelity MSCI Consumer Staples (FSTA) — $5,001 - $15,000 — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 28, 2025	$15,000 or less
(2).	Sold	Jun 27, 2025	$15,000 or less

13-T. ETF SER Solutions Defiance Quant (QTUM) — $1,000 or less — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 17, 2025	$15,000 or less
(2).	Sold (part)	Feb 25, 2025	$15,000 or less
(3).	Sold	Feb 26, 2025	$15,000 or less

13-U. Ishares U.S. Equity Factor Rotation (DYNF) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

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

13-V. Select Sector SPDR TR Energy (XLE) — $5,001 - $15,000 — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 24, 2025	$15,000 or less
(2).	Sold	Jun 25, 2025	$15,000 or less

13-W. Franklin Templeton Holdings Respbly Srcd Gld (FGDL) — $5,001 - $15,000 — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 21, 2025	$15,000 or less
(2).	Sold	Jun 30, 2025	$15,000 or less

13-X. Franklin Templeton ETF TR Intelligent (IQM) — $1,000 or less — Dividend — $15,001 - $50,000 — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 26, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 15, 2025	$15,000 or less

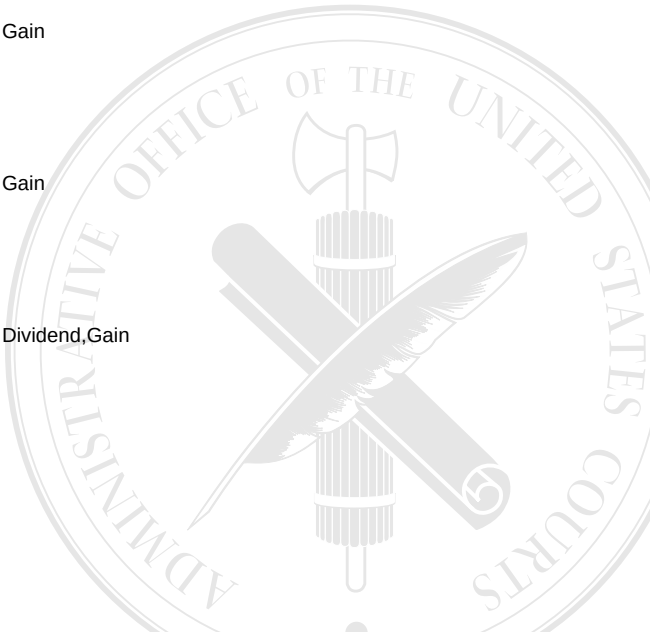
13-Y. Vanguard INTL Equity Index FDS FTSE (VGK) — $5,001 - $15,000 — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 28, 2025	$15,000 or less
(2).	Sold	Sep 10, 2025	$15,000 or less

13-Z. Goldman Sachs Physical Gold Unit (AAAU) — $5,001 - $15,000 — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 21, 2025	$15,000 or less
(2).	Sold	Jun 27, 2025	$15,000 or less

13-AA. FIMM Government Portfolio: Class I — $50,001 - $100,000 — Dividend,Gain



DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 25, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Mar 6, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 12, 2025	$15,001 - $50,000
(4).	Buy (add'l)	Apr 4, 2025	$15,000 or less
(5).	Sold (part)	Apr 9, 2025	$15,000 or less
(6).	Sold (part)	May 6, 2025	$15,000 or less
(7).	Sold (part)	May 19, 2025	$15,001 - $50,000
(8).	Buy (add'l)	Jun 3, 2025	$15,000 or less
(9).	Sold (part)	Jun 26, 2025	$15,001 - $50,000
(10).	Buy (add'l)	Aug 18, 2025	$15,000 or less
(11).	Sold (part)	Aug 25, 2025	$15,000 or less
(12).	Sold (part)	Sep 15, 2025	$15,000 or less
(13).	Sold (part)	Sep 16, 2025	$15,000 or less
(14).	Sold (part)	Oct 20, 2025	$15,000 or less
(15).	Buy (add'l)	Nov 3, 2025	$15,001 - $50,000
(16).	Sold	Nov 4, 2025	$50,001 - $100,000

13-AB. Fidelity Contrafund (FCNTX) — $5,001 - $15,000 — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 27, 2025	$15,000 or less
(2).	Buy (add'l)	Jun 30, 2025	$15,000 or less
(3).	Sold	Oct 1, 2025	$15,000 or less

13-AC. Alps International Sector DI (IDOG) — $5,001 - $15,000 — Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 21, 2025	$15,000 or less
(2).	Buy (add'l)	Jun 30, 2025	$15,000 or less
(3).	Buy (add'l)	Aug 13, 2025	$15,000 or less
(4).	Sold	Aug 27, 2025	$15,000 or less

13-AD. Nuscale PWR Corp CL A COM (SMR) — None — $15,000 or less — Cash/Market

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

VIII. Additional Information or Explanations

ADDITIONAL INFORMATION OR EXPLANATION
1. This report was prepared on my behalf by my accountant.
2. Fidelity Intl Cap Appreciation Fund (FIVFX) is reported as Fidelity Intl Cap Appreciation Fund (FICQX) as a result of a merger in 2025. The security was reported on line 20 of my 2024 report and is reported on line 6-B of my 2025 report.