Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Hurwitz, Andrew David
U.S. Court of Appeals - Ninth 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/ Hurwitz, Andrew David [electronically signed on May 13, 2026 5:49pm by Hurwitz, Andrew David in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	National Conference of Bar Examiners Torts Drafting Committee	Non-Profit	Committee Member
2.	Trust #1	Trust	Trustee

Additional Explanation: Reportable assets are listed in Part VII.

II. Agreements

	EMPLOYER OR PARTY NAME	TERMS	AGREEMENT START MONTH	AGREEMENT START YEAR
1.	Arizona Elected Officials Retirement System	Defined Benefit Pension Plan	June	2012

III A. Filer Non-Investment Income

	SOURCE	INCOME TYPE	INCOME AMOUNT	HONORARIUM DATE
1.	NCBE	Other: Stipend	$8,000.00	

Additional Explanation: National Conference of Bar Examiners

III B. Spouse Non-Investment Income

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	Arizona State Retirement System	Pension, 2024	No	$0.00	

IV. Reimbursements

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

V. Gifts

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

VI. Liabilities

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

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**(H) Individual Assets**				
1-A.	US Bank (cash)	$1,000 or less	Interest	$100,001 - $250,000	Cash/Market
2.	**(H) Account #1**				
2-A.	LPL Financial Deposit Account (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
2-B.	Clearbridge Large Cap Growth CL I (SBLYX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 18, 2025 $15,001 - $50,000				
2-C.	Cohen & Steers Pref Sec & Inc I (CPXIX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 18, 2025 $15,000 or less				
2-D.	Doubleline Total Return (DBLTX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-E.	Doubleline Flexible Income CL (DFLEX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 18, 2025 $15,001 - $50,000				
2-F.	First Eagle Gold (FEGIX)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
2-G.	Global X Artificial Intelligence & Technology ETF (AIQ)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-H.	Global X Fin Tech ETF (FINX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-I.	Innovator Laddered Allocation Power Buffer ETF (BUFF)		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy May 21, 2025 $15,000 or less				
2-J.	Global X Funds Data Center & Digital Infra ETF (DTCR)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-K.	Invesco Bulletshares 2026 Corp Bond ETF (BSCQ)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 18, 2025 $15,000 or less				
2-L.	Innovator Equity Managed Floor EFT (SFLR)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Mar 18, 2025 $15,001 - $50,000				
	(2). Buy (add'l) May 21, 2025 $15,000 or less				
	(3). Buy (add'l) Jul 11, 2025 $15,001 - $50,000				
	(4). Sold (part) Nov 18, 2025 $15,001 - $50,000				
2-M.	Invesco Nasdaq 100 ETF (QQQM)	$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 Nov 18, 2025 $15,000 or less				
2-N.	Matthews Asia Japan Inv (MJFOX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Nov 18, 2025 $15,000 or less				
2-O.	Overlay Hedged large Cap Equity ETF (OVLH)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jul 11, 2025 $15,001 - $50,000				
	(2). Buy (add'l) Jul 25, 2025 $15,001 - $50,000				
	(3). Buy (add'l) Nov 18, 2025 $15,001 - $50,000				
2-P.	Pacer Trendpilot Intl ETF (PTIN)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 18, 2025 $15,000 or less				
2-Q.	Pacer Trendpilot US Large Cap ETF (PTLC)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Mar 18, 2025 $15,001 - $50,000				
	(2). Sold May 21, 2025 $15,001 - $50,000				
2-R.	Pacer Trendpilo US Mid Cap ETF (PTMC)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2-S.	Pacer Benchmark Data & Infra RE Sect ETF (SRVR)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-T.	PGIM Tot Ret BD Z (PDBZX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-U.	Pimco Income P (PONPX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-V.	SPDR Corp Bond ETF (SPBO)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) May 30, 2025 $15,000 or less				
2-W.	SPDR Series Trust S&P Biotech ETF (XBI)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-X.	TCW Metwest Tot Ret Bd I (MWTIX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-Y.	TransAmerica Bond CL (TFXIX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
2-Z.	Vanguard Inflat Prot Sec Fund (VIPSX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 18, 2025 $15,001 - $50,000				
2-AA.	Vanguard Growth ETF (VUG)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 18, 2025 $15,001 - $50,000				
2-AB.	Wisdomtree Trust US Div Grwth Fund (DGRW)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 18, 2025 $15,001 - $50,000				
2-AC.	BNP Paribas Corporate Note Lkd		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed Jun 9, 2025 $50,001 - $100,000				
2-AD.	JPMorgan Chase (cash)		None	$50,001 - $100,000	Cash/Market
2-AE.	JPM Chase Finl Co Cap Buf Enh Corporate Note		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed Jul 3, 2025 $50,001 - $100,000				
2-AF.	JPM Chase Final Co Corporate Note		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 25, 2025 $15,000 or less				
2-AG.	JPM Chase Finl Co Corporate Note		None	$50,001 - $100,000	Cash/Market
2-AH.	JPM Chase Finl Co Uncap Buf Ret Enh Corporate Note		None	$50,001 - $100,000	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
2-AI.	JPMorgan Chase Finl Co Corporate Note Lkd Cpn		None	$50,001 - $100,000	Cash/Market
2-AJ.	BNP Paribas Note Lkd Spxfp Cpn Corporate Note		None	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jun 20, 2025 $50,001 - $100,000				
2-AK.	Jackson Life 6 Yr EAFE Cap Buffer 20% Index Fund		None	$15,001 - $50,000	Cash/Market
2-AL.	Jackson Life 6 Yr Russell Cap Buffer 20% Index Fund		None	$15,001 - $50,000	Cash/Market
2-AM.	Jackson Life 6 Yr SP500 Cap Buffer 20% Index Fund		None	$100,001 - $250,000	Cash/Market
3.	**(H) Account #2**				
3-A.	Allspring Core Plus BOND Inst Cl R (WIPIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-B.	American Beacon Small Cap Value Cl Y (ABSYX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-C.	Baird Core Plus Bond Inst Cl R (BCOIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-D.	Harbor Cap Apprec Instl Cl (HACAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-E.	Nomura Large Cap Growth Cl (IYGIX) was MacQuarie	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-F.	John Hancock Disiplined Value CL I (JVLIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-G.	JPMorgan Core Bond CL I (WOBDX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-H.	MFS Intl Equity CL I (MIEKX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-I.	MFS Value CL I (MEIIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4.	**(H) Account #3**				
4-A.	Cohen & Steers Pref Sec & Inc I (CPXIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-B.	Doubleline Total Return I (DBLTX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-C.	Doubleline Flexible Income CL (DFLEX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy May 23, 2025 $15,000 or less				
4-D.	First Eagle Gold (FEGIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) May 23, 2025 $15,000 or less				
4-E.	First Eagle Small Cap Oppty Cl I (FESCX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-F.	Global X Artificial Intelligence & Technology ETF (AIQ)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-G.	Innovator Laddered Allocation Power Buffer ETF (BUFF)		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy May 23, 2025 $15,000 or less				
4-H.	Global X Fin Tech ETF (FINX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 20, 2025 $15,000 or less				
4-I.	Innovator Equity Managed Floor ETF (SFLR)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Mar 20, 2025 $15,000 or less				
	(2). Sold (part) Nov 18, 2025 $15,000 or less				
4-J.	Ishares Bitcoin Trust ETF (IBIT)		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy May 30, 2025 $15,000 or less				
4-K.	Overlay Hedged large Cap Equity ETF (OVLH)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jul 11, 2025 $15,000 or less				
	(2). Buy (add'l) Nov 18, 2025 $15,000 or less				
4-L.	Pacer Trendpilot Intl ETF (PTIN)	$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 (add'l) Mar 20, 2025 $15,000 or less				
	(2). Sold Nov 5, 2025 $15,000 or less				
	(3). Buy Nov 18, 2025 $15,000 or less				
4-M.	Janus Henderson European Focus Instl Cl (HFEIX)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 20, 2025 $15,000 or less				
4-N.	Matthews Asian Japan Inv (MJFOX)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 20, 2025 $15,000 or less				
4-O.	Pacer Trendpilot US Large Cap ETF (PTLC)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 23, 2025 $15,000 or less				
4-P.	Pacer Trendpilot US Mid Cap ETF (PTMC)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-Q.	Pacer Benchmark Data & Infre Sect ETF (SRVR)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-R.	Pgim Tot Ret Bd Z (PDBZX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-S.	PIMCO Income (PONPX)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 23, 2025 $15,000 or less				
4-T.	SPDR Series Trust S&P Biotech ETF (XBI)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-U.	Strategy NASDAQ 7 Handl Index ETF (HNDL)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-V.	T Rowe Price Qm US Small Cap Growth Equity Investor CL (PRDSX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-W.	TCW Met West Tot Ret Bd I (MWTIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
4-X.	Vanguard Growth ETF (VUG)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 20, 2025 $15,000 or less				
4-Y.	Wisdomtree Trust US Div Grwth Fund (DGRW)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 20, 2025 $15,000 or less				
4-Z.	BNP Paribas Note Lkd		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed Jun 9, 2025 $15,000 or less				
4-AA.	JPMorgan Chase Finl Co Noted Lkd		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 25, 2025 $15,000 or less				
4-AB.	BNP Paribas Return Enh Note Lkd		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jun 20, 2025 $15,000 or less				
4-AC.	BofA Finance LLC Enh Ret Note Lkd		None	$15,001 - $50,000	Cash/Market
4-AD.	JPMorgan Chase (cash)		None	$15,000 or less	Cash/Market
4-AE.	JPMorgan Chase Finl Co Cap Buf Enh Note		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed Jul 3, 2025 $15,000 or less				

5. **(H) Account #4**

Additional Explanation: This is an Allianz Index Advantage Variable Annuity.

5-A.	Allianz Index Protection Strategy S&P 500 Index		None	$50,001 - $100,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 3, 2025	$50,001 - $100,000
(2).	Sold (part)	Nov 6, 2025	$15,000 or less

5-B.	Allianz Index Guard Strategy Russell 2000 Index		None	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 3, 2025	$15,001 - $50,000
(2).	Sold (part)	Nov 6, 2025	$15,000 or less

5-C.	Allianz Index Performance Strategy 1-Year Term: Euro Stoxx 50		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jun 3, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Jun 3, 2025	$15,000 or less
(3).	Sold (part)	Nov 6, 2025	$15,000 or less

5-D.	Allianz Index Protection Strategy Euro Stoxx 50		None	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 3, 2025	$15,001 - $50,000

5-E.	Allianz Index Performance Strat 3-Year Term: S&P 500 Index		None	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jun 3, 2025	$100,001 - $250,000
(2).	Sold (part)	Nov 6, 2025	$15,000 or less

5-F.	Allianz Index Performance Strat 3-Yr Term: Russell 2000 Index		None	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jun 3, 2025	$15,001 - $50,000
(2).	Sold (part)	Nov 6, 2025	$15,000 or less

5-G.	Allianz Index Performance Strat 1-Year Term: NASDAQ - 100 INDEX		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jun 3, 2025	$15,001 - $50,000

6. **(H) Account #5**

Additional Explanation: This is an Allianz Index Advantage Variable Annuity.

6-A.	Allianz Index Performance Strategy 6-year Term S&P 500 Index		None	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Nov 6, 2025	$15,000 or less

7. **(H) Account #6**

7-A.	LPL Financial Deposit Account (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
7-B.	Cubesmart Com (CUBE)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
7-C.	Allspring Mun Bond Instl Cl (WMBIX)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	May 23, 2025	$15,000 or less

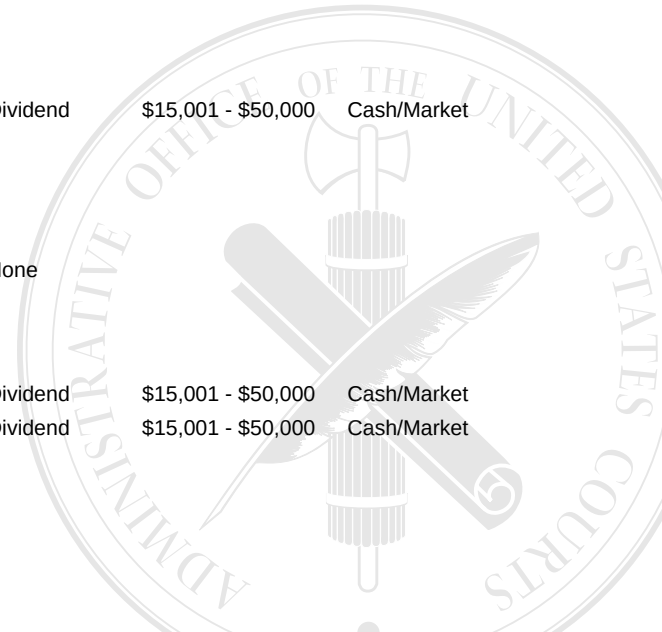
7-D.	Blackrock Muniyield Quality Fund (MQY)	$1,001 - $2,500	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	May 23, 2025	$15,001 - $50,000

7-E.	Doubleline Core Fixed Income Cl I (DBLFX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-F.	Eaton Vance Arizona Mun Income Cl I (EIAZX)	$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) May 23, 2025 $15,001 - $50,000				
7-G.	First Eagle Gold (FEGIX)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
7-H.	Franklin Bitcoin ETF (EZBC)		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 9, 2025 $15,000 or less				
7-I.	Global X Funds Data Center & Digital Infra ETF (DTCR)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
7-J.	Harding Loevner Intl Equity Instl (HLMIX)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 20, 2025 $15,001 - $50,000				
7-K.	Innovator Equity Managed Floor ETF (SFLR)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) May 21, 2025 $15,001 - $50,000				
	(2). Sold (part) Nov 7, 2025 $15,001 - $50,000				
	(3). Sold (part) Nov 18, 2025 $15,001 - $50,000				
7-L.	iShares Edge MSCI USA Min Vol ETF (USMV)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Nov 7, 2025 $15,001 - $50,000				
7-M.	Overlay Hedged Large Cap Equity ETF (OVLH)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 18, 2025 $15,000 or less				
	(2). Buy (add'l) Dec 8, 2025 $15,000 or less				
7-N.	John Hancock Disciplined Value CL I (JVLIX)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 18, 2025 $15,001 - $50,000				
7-O.	Pacer Trendpilot US Large Cap ETF (PTLC)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold May 21, 2025 $15,001 - $50,000				
7-P.	Pacer Trendpilot US Mid Cap ETF (PTMC)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Mar 18, 2025 $15,001 - $50,000				
	(2). Sold (part) May 23, 2025 $15,001 - $50,000				
7-Q.	Pacer Trendpilot Intl ETF (PTIN)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Mar 18, 2025 $15,000 or less				
	(2). Buy (add'l) Mar 20, 2025 $15,001 - $50,000				
	(3). Sold Nov 7, 2025 $15,001 - $50,000				
7-R.	Pimco Ultra Short Government Active ETF (BILZ)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Mar 18, 2025 $15,000 or less				
	(2). Buy (add'l) Nov 18, 2025 $15,000 or less				
7-S.	SPDR Portfolio S&P 400 Mid Cap ETF (SPMD)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Mar 18, 2025 $15,001 - $50,000				
7-T.	SPDR Series Trust S&P Biotech ETF (XBI)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
7-U.	T Rowe Price Dividend Growth Inv CL (PRDGX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Nov 7, 2025 $15,001 - $50,000				
	(2). Sold (part) Nov 18, 2025 $15,000 or less				
7-V.	TCW Metwest Total Return Bond CL (MWTIX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) May 23, 2025 $15,001 - $50,000				
	(2). Sold (part) Oct 13, 2025 $15,000 or less				
7-W.	Vanguard Growth ETF (VUG)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
7-X.	Wisdomtree Trust US Div Grwth Fund (DGRW)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
7-Y.	Utilities Select Sector SPDR ETF (XLU)	$1,000 or less	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy May 27, 2025 $15,000 or less				
	(2). Sold Nov 7, 2025 $15,000 or less				
7-Z.	Ishares Bitcoin Trust ETF (IBIT)		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy May 29, 2025 $15,001 - $50,000				
	(2). Sold Dec 9, 2025 $15,001 - $50,000				
7-AA.	JPM Chase Final Co Note Lkd		None	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 25, 2025 $15,001 - $50,000				
7-AB.	BNP Paribas Note Lkd Corporate Note		None		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Redeemed Jun 9, 2025 $50,001 - $100,000				
7-AC.	BofA Finance LLC Enh Ret Note Lkd Corporate Note		None	$50,001 - $100,000	Cash/Market
7-AD.	Citgroup Glbl Mkts Hldg Buf Secs Lkd Corporate Note		None	$50,001 - $100,000	Cash/Market
7-AE.	JPMorgan Chase Finl Co Note Lkd Corporate Note		None	$50,001 - $100,000	Cash/Market
7-AF.	JPMorgan Chase (cash)		None	$50,001 - $100,000	Cash/Market
7-AG.	BNP Paribas Note Lkd Spxfp Cpn Corporate Note		None	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jun 20, 2025 $50,001 - $100,000				
7-AH.	Jackson Life 6 Yr EAFE Cap Buffer 20%		None	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Mar 28, 2025 $15,000 or less				
7-AI.	Jackson Life 6 Yr Russell Cap Buffer 20% Index Fund		None	$50,001 - $100,000	Cash/Market
7-AJ.	Jackson Life 6 Yr SP500 Cap Buffer 20% Index Fund		None	$100,001 - $250,000	Cash/Market
8.	**(H) Account #7**				
8-A.	Prosperity Life Select Choice Plus MVA Fixed Annuity		None	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jun 16, 2025 $50,001 - $100,000				
9.	**(H) Account #8**				
9-A.	American Funds Amcap 529A (CAFAX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 18, 2025 $15,000 or less				
	(2). Buy (add'l) Nov 18, 2025 $15,000 or less				
	(3). Sold (part) Dec 19, 2025 $15,000 or less				
9-B.	American Funds Balanced Fund 529A (CLBAX)	$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). Sold (part) Jul 18, 2025 $15,000 or less				
	(2). Buy (add'l) Nov 18, 2025 $15,000 or less				
	(3). Sold (part) Dec 19, 2025 $15,000 or less				
9-C.	American Funds Mutual 529A (CMLAX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 18, 2025 $15,000 or less				
	(2). Buy (add'l) Nov 18, 2025 $15,000 or less				
	(3). Sold (part) Dec 19, 2025 $15,000 or less				
9-D.	American Funds the Bond Fund of America (CFAAX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jul 18, 2025 $15,000 or less				
	(2). Buy (add'l) Nov 18, 2025 $15,000 or less				
	(3). Sold (part) Dec 19, 2025 $15,000 or less				
10.	**(H) Account #9**				
10-A.	American Funds Amcap 529A (CAFAX)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 18, 2025 $15,000 or less				
10-B.	American Funds Balanced Fund 529A (CLBAX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 18, 2025 $15,000 or less				
10-C.	American Funds Mutual 529A (CMLAX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 18, 2025 $15,000 or less				
10-D.	American Funds Washington Mutual Inv Fund 529A (CWMAX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 18, 2025 $15,000 or less				
11.	**(H) Account #10**				
11-A.	American Amcap 529A (CAFAX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 18, 2025 $15,000 or less				
11-B.	American Balanced Fund 529A (CLBAX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 18, 2025 $15,000 or less				
11-C.	American Funds Washington Mutual Inv Fund 529A (CWMAX)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy (add'l) Nov 18, 2025 $15,000 or less				

VIII. Additional Information or Explanations

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



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