Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Maldonado, Nancy L.
U.S. Court of Appeals - Seventh Circuit
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/ Maldonado, Nancy L. [electronically signed on Jun 8, 2026 1:23pm by Maldonado, Nancy L. in JEFS]
/s/ Maldonado, Nancy L. [electronically signed on May 12, 2026 6:34pm by Maldonado, Nancy L. in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	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.	Miner, Barnhill & Galland, P.C.	Profit Sharing and 401(k) Plan	August	2003

Additional Explanation: Reportable assets are listed in Part VII

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

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.	Chase Bank (cash)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
1-B.	Met Life Insurance Whole Life	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
1-C.	State Farm Universal Life	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
2.	**(H) Account #1**				
2-A.	American Funds 2040 Target Date Retirement Fund (RFGTX)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 14, 2025	$500,001 - $1,000,000

2-B.	Blackrock Liquidity Fed Fund Portfolio (TFDXX) (cash eq.)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$500,001 - $1,000,000
(2).	Sold (part)	Mar 21, 2025	$500,001 - $1,000,000
(3).	Buy (add'l)	Jun 9, 2025	$15,000 or less
(4).	Sold (part)	Sep 11, 2025	$15,000 or less
(5).	Buy (add'l)	Oct 23, 2025	$15,000 or less
(6).	Buy (add'l)	Dec 26, 2025	$15,000 or less

2-C.	Fidelity Salem Fid 500 Index Fund (FXAIX)	$5,001 - $15,000	Dividend,Gain	$250,001 - $500,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$100,001 - $250,000
(2).	Sold (part)	Apr 7, 2025	$15,000 or less
(3).	Sold (part)	Jun 6, 2025	$15,000 or less
(4).	Sold (part)	Oct 22, 2025	$15,001 - $50,000

2-D.	Fidelity Salem International Index Fund (FSPSX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,001 - $50,000

2-E.	JPMorgan ETF Betabuilders Cda (BBCA)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,000 or less

2-F.	JPMorgan ETF Betabuilders Developed Asia Pacific Ex Japan (BBAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,000 or less

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
2-G.	JPMorgan ETF Betabuilders Europe ETF (BBEU)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Oct 22, 2025	$15,000 or less

2-H.	JPMorgan ETF Betabuilders Japan (BBJP)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,001 - $50,000

2-I.	Six Circles Tr Intl Unconstrained Equity Fd (CIUEX)	$1,001 - $2,500	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,001 - $50,000
(2).	Sold (part)	Jun 6, 2025	$15,000 or less

2-J.	Six Circles Tr US Unconstrained Equity Fd (CUSUX)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$50,001 - $100,000
(2).	Buy (add'l)	Oct 22, 2025	$15,000 or less

2-K.	iShares Tr US Treasury Bond ETF (GOVT)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Oct 22, 2025	$15,000 or less

2-L.	Lord Abbett Invt Tr Short Duration Income Fd (LOLDX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,000 or less

2-M.	Six Circles Tr Global Bond Fund (CGLBX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,001 - $50,000

2-N.	Six Circles Trust Credit Opportunities Fund (CRDOX)	$1,001 - $2,500	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,001 - $50,000
(2).	Sold (part)	Oct 22, 2025	$15,000 or less

2-O.	Vanguard Intermediate Term Corp Bond ETF (VCIT)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,000 or less
(2).	Sold (part)	Sep 10, 2025	$15,000 or less

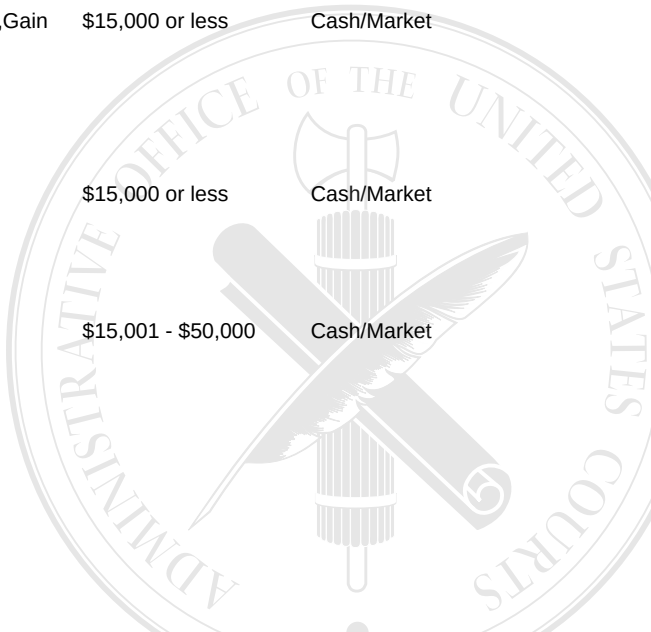
2-P.	Vanguard Scottsdale Mortgage Backed Securities ETF (VMBS)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,001 - $50,000
(2).	Sold (part)	Oct 22, 2025	$15,000 or less

2-Q.	Vanguard Total Bond ETF (BND)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

2-R.	Vanguard Total International Bond ETF (BNDX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,000 or less
(2).	Buy (add'l)	Jun 6, 2025	$15,000 or less
(3).	Buy (add'l)	Oct 22, 2025	$15,000 or less

2-S.	Blackstone Alternative Multi Strategy Fund Cl Y (BXMYX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,000 or less

2-T.	Neuberger Berman Alternative Fds Long Short Instl Cl (NLSIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 10, 2025	$15,000 or less

2-U.	Pimco Mortgage Opportunities and Bond Fund (PMZIX)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,000 or less
(2).	Sold (part)	Sep 10, 2025	$15,000 or less

2-V.	Six Circles Tr Multi Strategy Fund (CALTX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 20, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 10, 2025	$15,000 or less

3.	**(H) Account #2**				
3-A.	Blackrock Index Fds Inc iShares MSCI EAFE Intl Index Fd (BTMKX)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 3, 2025	$15,000 or less
(2).	Sold	Jul 11, 2025	$15,000 or less

3-B.	Fidelity Salem Str Tr Fidelity 500 Index Fund (FXAIX)	$1,000 or less	Dividend,Gain		

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

3-C.	iShares Core S&P 500 ETF (IVV)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-D.	iShares S&P Mid Cap ETF (IJH)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 3, 2025	$15,000 or less
(2).	Sold	Jun 24, 2025	$15,000 or less

3-E.	JPMorgan Exchange Traded Fd Tr Betabuilders CDA ETF (BBCA)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

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

3-F.	JPMorgan Exchange Traded Fd Tr Betabuilders Dev Asia Pac (BBAX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-G.	JPMorgan Exchange Traded Tr Betabuilders Europe ETF (BBEU)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jun 24, 2025	$15,000 or less
(2).	Sold (part)	Jul 11, 2025	$15,000 or less

3-H.	JPMorgan Exchange Traded Tr Betabuilders Japan ETF (BBJP)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
3-I.	Select Sector SPDR Trust The Financial Select Sector (XLF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-J.	Select Sector SPDR Trust The Industrial Select Sector (XLI)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
3-K.	Six Circles Tr Mngd EQI Prtfl Intl Uccntnd Fd (CMIUX)	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jun 24, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 11, 2025	$15,000 or less

3-L.	Six Circles Tr Mngd EQI Prtfl US Uncnstnd Fd (CMEUX)	$1,001 - $2,500	Dividend,Gain	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 3, 2025	$15,000 or less
(2).	Sold (part)	Jun 24, 2025	$15,000 or less

3-M.	Vanguard 500 Index Fund Admiral Shares (VFIAX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
3-N.	Vanguard S&P 500 Index Fund ETF (VOO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

4. **(H) Account #3**

4-A.	Fidelity Government Money Market Fund (FZCXX) (cash eq.)	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 14, 2025	$15,000 or less
(2).	Sold (part)	May 28, 2025	$15,000 or less

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

5-A.	Advisors Inner Circle Fd II Kopernik Global All Cap Fd (KGGIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-B.	Etfis Ser Tr I Virtus Reaves Utilities ETF (UTES)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

5-C.	Global X Fds US Infrastructure Dev ETF (PAVE)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 14, 2025	$15,000 or less
(2).	Buy	May 12, 2025	$15,000 or less

5-D. Global X Fds Copper Miners ETF (COPX) — None — $15,000 or less — Cash/Market

Additional Explanation: No income was paid in 2025 during the period this asset was owned.

5-E.	Harris Assoc Invt TR Oakmark Fd Cl R6 (OAZMX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-F.	Harris Assoc Invt TR Oakmark Intl Fd Cl R6 (OAZIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

5-G.	Innovator Etfs Tr Defined Wealth Shield EFT (BALT)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Nov 18, 2025	$15,000 or less

5-H.	Invesco Exchange Traded Fd Tr II KBW Bank EFT (KBWB)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-I.	iShares TR iShares Semiconductor ETF (SOXX)	$1,000 or less	Gain		

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 13, 2025	$15,000 or less

5-J.	Invesco Exchange Traded S&P 500 Equal Weight Indls (RSPN)		None	$15,000 or less	Cash/Market

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

5-K.	iShares Core MSCI Emerging Markets ETF (IEMG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

5-L.	iShares Core S&P Small Cap (IJR)	$1,000 or less	Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Aug 25, 2025	$15,000 or less
(2).	Sold	Nov 7, 2025	$15,000 or less

5-M.	iShares MSCI Europe Financial Sector (EUFN)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 10, 2025	$15,000 or less

5-N.	iShares Russell 1000 (IWF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 5, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 31, 2025	$15,000 or less

5-O.	iShares Tr Expanded Tech Sector ETF (IGM)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

5-P.	iShares Tr MSCI China Index Fd (MCHI)	$1,000 or less	Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 23, 2025	$15,000 or less
(2).	Sold	Oct 10, 2025	$15,000 or less

5-Q.	iShares Tr MSCI India Index Fd (INDA)	$1,000 or less	Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Feb 3, 2025	$15,000 or less
(2).	Buy	Apr 3, 2025	$15,000 or less
(3).	Sold	Jul 23, 2025	$15,000 or less

5-R.	iShares Tr North American Tech Software ETF (IGV)	$1,000 or less	Gain

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

5-S.	iShares Tr US Transportation (IYT)	$1,000 or less	Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 12, 2025	$15,000 or less
(2).	Sold	Jul 31, 2025	$15,000 or less

5-T.	iShares Tr US Treasury Bond ETF (GOVT)		None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 2, 2025	$15,000 or less
(2).	Sold	Jan 14, 2025	$15,000 or less

5-U.	JPMorgan Exchange Traded Fd TR JPM US Tech Leaders ETF (JTEK)		None	$15,000 or less	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
5-V.	Listed Funds Trust Horizon Kinetics Inflation Ben ETF (INFL)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-W.	Price T Rowe Global Technology Fd Inc Cl I (PGTIX)		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 13, 2025	$15,000 or less

5-X.	Select Sector SPDR Tr Health Care ETF (XLV)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-Y.	Select Sector SPDR SHS Ben Consumer Discretional (XLY)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 13, 2025	$15,000 or less
(2).	Sold (part)	Jul 16, 2025	$15,000 or less
(3).	Buy (add'l)	Sep 29, 2025	$15,000 or less
(4).	Sold	Nov 18, 2025	$15,000 or less

5-Z.	Select Sector SPDR Trust The Comm Services Select Sector (XLC)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	May 9, 2025	$15,000 or less
(2).	Buy	Oct 21, 2025	$15,000 or less
(3).	Sold	Nov 18, 2025	$15,000 or less

5-AA.	Select Sector SPDR Trust Financial Select Sector SPDR Fund (XLF)	$1,000 or less	Dividend,Gain		

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

5-AB.	Select Sector SPDR Trust The Utilities SS SPDR Fund (XLU)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 6, 2025	$15,000 or less
(2).	Buy (add'l)	May 9, 2025	$15,000 or less
(3).	Sold	Sep 15, 2025	$15,000 or less

5-AC.	SPDR Euro Stoxx 50 ETF (FEZ)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-AD.	SPDR Series Trust State Street S&P Biotech ETF (XBI)		None	$15,000 or less	Cash/Market

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

5-AE.	Vaneck ETF Semiconductor EtF (SMH)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-AF.	SPDR Ser TR S&P Homebuilders ETF (XHB)		None		

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

5-AG.	SPDR Ser TR S&P Ins ETF (KIE)	$1,000 or less	Dividend		

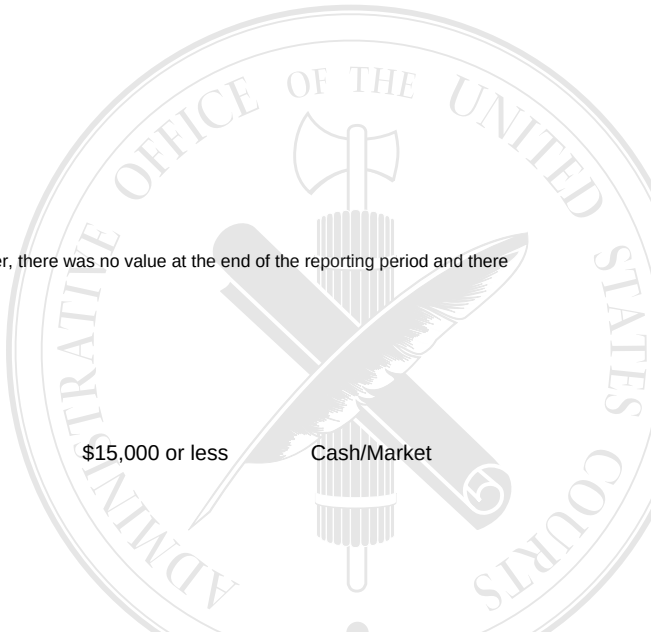
Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Apr 7, 2025	$15,000 or less

5-AH.	Vanguard Intl Equity Index Ds Ftse Europe ETF (VGK)	$1,000 or less	Dividend		

Additional Explanation: There were reportable purchases, as indicated, for this asset. However, there was no value at the end of the reporting period and there were no reportable sales.

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 12, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 14, 2025	$15,000 or less

5-AI.	Wisdomtree Japan Hedged Equity Fund (DXJ)	$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	Oct 29, 2025	$15,000 or less

5-AJ.	Columbia Fds Ser Tr Conv Secs Rd Cl Instl 3 (CSFYX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 4, 2025	$15,000 or less
(2).	Buy (add'l)	Sep 5, 2025	$15,000 or less

5-AK.	Hartford Mut Fds Inc World Bd Cl F (HWDFX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jun 25, 2025	$15,000 or less
(2).	Sold (part)	Sep 4, 2025	$15,000 or less

5-AL.	Invesco CurrencyShares Japanese Yen Trust (FXY)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 3, 2025	$15,000 or less
(2).	Sold	Jul 17, 2025	$15,000 or less

5-AM.	iShares 20 Plus Yr Treasury Bond ETF (TLT)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Oct 10, 2025	$15,000 or less
(2).	Buy (add'l)	Oct 17, 2025	$15,000 or less
(3).	Buy (add'l)	Oct 31, 2025	$15,000 or less
(4).	Sold (part)	Dec 12, 2025	$15,000 or less

5-AN.	iShares Trust 7-10 Year Treasury (IEF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

5-AO.	iShares S&P Citigroup International Tresury Bond (IGOV)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jul 31, 2025	$15,000 or less
(2).	Sold (part)	Sep 29, 2025	$15,000 or less
(3).	Sold	Oct 1, 2025	$15,000 or less

5-AP.	iShares Tr Broad USD High Yield Corp Bd ETF (USHY)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 12, 2025	$15,000 or less
(2).	Buy (add'l)	May 14, 2025	$15,000 or less
(3).	Buy (add'l)	Jun 6, 2025	$15,000 or less
(4).	Sold (part)	Sep 23, 2025	$15,000 or less
(5).	Sold	Sep 30, 2025	$15,000 or less

5-AQ.	JPMorgan Exchange Traded Fd Tr Mortgage Backed Sec ETF (JMTG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-AR.	iShares Trust 3-7 Year Treasury Bond ETF (IEI)	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 14, 2025	$15,000 or less
(2).	Sold	Jun 6, 2025	$15,000 or less

5-AS.	PGIM High Yield Fund Cl R6 (PHYQX)	$1,000 or less	Dividend,Gain	$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)	Feb 12, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 5, 2025	$15,000 or less
(3).	Sold (part)	Oct 17, 2025	$15,000 or less

5-AT. PIMCO Total Return Bond Fd Inc Cl R6 (PTRQX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 17, 2025	$15,000 or less
(2).	Buy (add'l)	Jul 31, 2025	$15,000 or less

5-AU. Pimco Emerging Markets Local Curr & Bond Fund Ins Cl (PELBX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

5-AV. Pimco Income Fd Instl Cl (PIMIX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 4, 2025	$15,000 or less

5-AW. Professionally Mngd Prtfls Muzinch LW Drtn Fd (MZLSX) — $1,000 or less — Dividend,Gain

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

5-AX. Schwab Strategic TR US Tips ETF (SCHP) — $1,000 or less — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 2, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 12, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 24, 2025	$15,000 or less
(4).	Sold (part)	Apr 29, 2025	$15,000 or less
(5).	Sold (part)	Oct 17, 2025	$15,000 or less
(6).	Sold	Oct 31, 2025	$15,000 or less

5-AY. Vanguard Scottsdale Funds Intermediate Term Treasury ETF (VGIT) — $1,000 or less — Dividend,Gain — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 5, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 10, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 11, 2025	$15,000 or less
(4).	Buy (add'l)	Apr 8, 2025	$15,000 or less
(5).	Sold (part)	May 21, 2025	$15,000 or less
(6).	Sold (part)	Jun 2, 2025	$15,000 or less
(7).	Sold (part)	Jun 10, 2025	$15,000 or less
(8).	Sold (part)	Jun 25, 2025	$15,000 or less
(9).	Sold (part)	Jul 31, 2025	$15,000 or less
(10).	Buy (add'l)	Oct 17, 2025	$15,000 or less

5-AZ. Vanguard Scottsdale Funds Vanguard Shrt Term Treasury ETF (VGSH) — $1,000 or less — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Mar 11, 2025	$15,000 or less
(2).	Sold (part)	Mar 12, 2025	$15,000 or less
(3).	Sold	Apr 14, 2025	$15,000 or less

5-BA. Vanguard Short Term Corp Bond ETF (VCSH) — $1,000 or less — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jul 31, 2025	$15,000 or less
(2).	Sold	Aug 25, 2025	$15,000 or less

5-BB. Vanguard Total International Bond ETF (BNDX) — $1,000 or less — Dividend

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

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

5-BC. American Beacon Fds AHL Mngd Futures Stratgy Cl R5 (AHLIX) — None

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	May 12, 2025	$15,000 or less

5-BD. Abrdn Silver ETF Tr (SIVR) — None — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 20, 2025	$15,000 or less

5-BE. AQR Fds Equity Mkt Neutral Fd Cl R6 (QMNRX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Dec 5, 2025	$15,000 or less

5-BF. Blackrock Event Driven Equity Fund (BILPX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

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

5-BG. Blackrock FDS II Global EQI Mrkt Neutral CL (BGCKX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

5-BH. CRM Mut Fd TR Lng Sht Opportunities Fd Instl (CRIHX) — None — $15,000 or less — Cash/Market

5-BI. Eaton Vance Mututal Fds Tr Prmtrc Cmdity Strt (EIPCX) — $1,000 or less — Dividend — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 29, 2025	$15,000 or less

5-BJ. iShares Gold Trust Shares of The iShares Gold Trust (IAU) — $1,000 or less — Dividend,Gain — $15,000 or less — Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 10, 2025	$15,000 or less
(2).	Sold (part)	Mar 4, 2025	$15,000 or less
(3).	Sold (part)	Mar 10, 2025	$15,000 or less
(4).	Buy (add'l)	Apr 9, 2025	$15,000 or less
(5).	Sold (part)	Oct 27, 2025	$15,000 or less
(6).	Buy (add'l)	Dec 12, 2025	$15,000 or less

5-BK. JPMorgan Exchange Traded Fd Tr JPM EQTY Prm Income ETF (JEPI) — $1,000 or less — Dividend

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Feb 24, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 25, 2025	$15,000 or less
(3).	Sold	Apr 29, 2025	$15,000 or less

5-BL. JPMorgan Nasdaq Equity Premium Income ETF (JEPQ) — $1,000 or less — Dividend,Gain

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 10, 2025	$15,000 or less
(2).	Buy (add'l)	Apr 29, 2025	$15,000 or less
(3).	Sold (part)	May 13, 2025	$15,000 or less
(4).	Sold	Jun 5, 2025	$15,000 or less

5-BM. JPMorgan TR I Hedged Equity Fd Cl 6 (JHQRX) — $1,000 or less — Dividend,Gain

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Feb 3, 2025	$15,000 or less
(2).	Buy (add'l)	Mar 10, 2025	$15,000 or less
(3).	Sold	Mar 31, 2025	$15,000 or less

5-BN.	JPMorgan TR IV Hedged Equity 2 Fd Cl R6 (JHDRX)	$1,000 or less	Dividend,Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 6, 2025	$15,000 or less
(2).	Buy (add'l)	Feb 3, 2025	$15,000 or less
(3).	Buy (add'l)	Mar 4, 2025	$15,000 or less
(4).	Sold (part)	Apr 1, 2025	$15,000 or less
(5).	Buy (add'l)	Nov 18, 2025	$15,000 or less

5-BO.	JPMorgan TR IV Hedged Equity 3 Fd Cl R6 (JHTRX)	$1,000 or less	Dividend,Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jul 14, 2025	$15,000 or less

5-BP.	Litman Gregory Funds Trust IMGP DBI Managed (DBMF)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

5-BQ.	Neuberger Berman Alternative Fds Long Short Fd Instl Cl (NLSIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 31, 2025	$15,000 or less

5-BR.	Northern LTS Fd Tr II Invenomic Super Inst (BIVSX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-BS.	Pimco Fds Pimco Dynamic Bond Fund Inst (PFIUX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
5-BT.	Pimco Fds Trends Managed Futures Strategy Fd Intl Cl (PQTIX)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 3, 2025	$15,000 or less
(2).	Sold	May 12, 2025	$15,000 or less

5-BU.	Pimco Mortgage Opportunities and Bond Fund Inst (PMZIX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

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

5-BV.	iShares US Home Construction (ITB)	$1,000 or less	Dividend		

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

5-BW.	JPMorgan TR I Income Fd R6 (JMSFX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Mar 4, 2025	$15,000 or less

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

Additional Explanation: This account does not attribute income to individual assets; it reports in unit value.

6-A.	Bright Start Index Moderate Age Based [redacted]		None	$50,001 - $100,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
7.	**(H) Account #6**				
	Additional Explanation: This account does not attribute income to individual assets; it reports in unit value.				
7-A.	Bright Start Index Moderate Age Based [redacted]		None	$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