Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Richardson, Julius Ness
U.S. Court of Appeals - Fourth 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/ Richardson, Julius Ness [electronically signed on Jul 30, 2026 9:47am by Richardson, Julius Ness in JEFS]
/s/ Richardson, Julius Ness [electronically signed on Jun 16, 2026 10:57am by Richardson, Julius Ness in JEFS]

I. Positions

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

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
1.	Georgetown Law School	May 2, 2025	May 3, 2025	Clearwater, FL	Attend originalism seminar	Travel, lodging, meals
2.	Federalist Society Chicago Law	Jan 22, 2025	Jan 23, 2025	Chicago, IL	Speaking event	Travel, lodging
3.	Federal Society Yale/Harvard Law	Feb 3, 2025	Feb 5, 2025	New Haven, CT & Cambridge, MA	Speaking event	Travel, lodging
4.	Federalist Society Vandy Law	Mar 5, 2025	Mar 6, 2025	Nashville, TN	Speaking event	Travel, lodging

	SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
5.	Federalist Society N.D. Law	Oct 2, 2025	Oct 3, 2025	South Bend, IN	Speaking event	Travel, 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) Real Estate LLC #4 (16.66%) (H)**				
1-A.	- Undeveloped Land, Richland County, South Carolina		None	$250,001 - $500,000	Estimated
2.	**(H) Trust #9 (H)**				
2-A.	- SPDR S&P Dividend ETF ETF Non- Qualified Gross Dividend	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
2-B.	- GS Short Duration Tax Free Fund Class P	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

	Transactions	Transaction Type	Transaction Date	Transaction Value
	(1).	Buy	Oct 10, 2025	$50,001 - $100,000

2-C.	- GS High Yield Floating Rate Fund Class	$5,001 - $15,000	Dividend		

	Transactions	Transaction Type	Transaction Date	Transaction Value
	(1).	Sold	Oct 9, 2025	$100,001 - $250,000

2-D.	- Goldman Sachs Bank USA Deposit	$2,501 - $5,000	Interest	$15,000 or less	Cash/Market
3.	**(H) Trust #8 (H)**				
3-A.	- Blackrock Treasury Temporary Overnight Deposit (BLF Treasury Trust)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
3-B.	- Bank of America Temporary Overnight Deposit	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
3-C.	- Texas Pac LC TR SUB CTF Prop IP1	$15,001 - $50,000	Dividend	$1,000,001 - $5,000,000	Cash/Market

	Transactions	Transaction Type	Transaction Date	Transaction Value
	(1).	Sold (part)	Apr 23, 2025	$15,000 or less
	(2).	Sold (part)	Apr 23, 2025	$100,001 - $250,000

4.	**First Citizens Bank - Cash Account #1**	$1,000 or less	Interest	$15,000 or less	Cash/Market
5.	**(H) Investment LLC (35.45% interest) (H)**				
5-A.	- IShares Trust Ishares 1-5 Year ETF Corporate Bond ETF	$2,501 - $5,000	Dividend	$15,000 or less	Cash/Market
	Additional Explanation: This iShrares investment was sold in 2024 per our 2024 report, and a small trailing dividend was paid after the sale transaction.				
5-B.	- Goldman Sachs Bank USA Deposit (BDA)	$1,000 or less	Interest	$15,000 or less	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
6.	**(H) Real Estate LLC #2 (33.3% interest) (H)**				
6-A.	- Goldman Sachs - Cash Account	$1,000 or less	Interest	$100,001 - $250,000	Cash/Market
6-B.	- Undeveloped Tracts A through D, Barnwell County, South Carolina		None	$15,001 - $50,000	Estimated
6-C.	- Undeveloped Tracts A through H, Bamberg County, South Carolina	$1,001 - $2,500	Rent	$15,001 - $50,000	Estimated
7.	**(H) Trust #5 (H)**				
7-A.	- IShares Russell 2000 ETF	$1,001 - $2,500	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jan 30, 2025	$15,001 - $50,000

7-B.	- GS High Yield Municipal Fund Institutional Shares	$1,001 - $2,500	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 15, 2025	$50,001 - $100,000
(2).	Sold	Apr 22, 2025	$50,001 - $100,000

7-C.	- SPDR S&P 500 ETF Trust P1	$5,001 - $15,000	Dividend	$500,001 - $1,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 30, 2025	$15,001 - $50,000
(2).	Sold (part)	Apr 22, 2025	$50,001 - $100,000
(3).	Sold (part)	Apr 29, 2025	$100,001 - $250,000
(4).	Sold (part)	May 27, 2025	$50,001 - $100,000
(5).	Sold (part)	Jun 24, 2025	$100,001 - $250,000
(6).	Sold (part)	Aug 18, 2025	$50,001 - $100,000

7-D.	- Goldman Sachs Bank USA Deposit (BDA)	$1,001 - $2,500	Interest	$15,000 or less	Cash/Market
8.	**(H) Trust #7 (H)**				
8-A.	- Memphis Tenn LT GAS & WT		None	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Oct 23, 2025	$100,001 - $250,000

8-B.	- Vanguard Value ETF P1	$50,001 - $100,000	Dividend	$1,000,001 - $5,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 7, 2025	$15,001 - $50,000
(2).	Sold (part)	Jun 18, 2025	$15,001 - $50,000
(3).	Sold (part)	Sep 15, 2025	$50,001 - $100,000

8-C.	- Vanguard Real Estate ETF	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jul 11, 2025	$50,001 - $100,000

8-D.	- Lake Central SCH CORP IND GO DEC30 2030	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-E.	- Broward Cnty FLA SCH BRD CTFS PARTN CTFS PARTN	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-F.	- College Station Tex Go Refunds Bonds DTD	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
8-G.	- Southeastern PA Trans Auth Rev Cap June 2029	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-H.	- Bank of America Temporary Overnight Deposit	$1,000 or less	Interest	$15,000 or less	Cash/Market
8-I.	- Lake Cnty ILL Go Sales Tax Alt Rev Source REF DTD	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
8-J.	- Anderson SC WTR & SWR SYS Rev Bonds	$2,501 - $5,000	Interest		

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

8-K.	- MFS Mid Cap Value Fund CL R6	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market
8-L.	- MFS Value Fund CL R6	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
8-M.	- Mississippi Dev BK SPL Oblig	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
8-N.	- IShares Core S&P Small-Cap	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market
8-O.	- Connecticut St Health & EDL Facs Auth Rev Jul 2034	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
8-P.	- Kentucky ST PTTY & BLDGS REVS BDS PROJ APR2035	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 27, 2025	$100,001 - $250,000

8-Q.	- Artisan International Fund	$50,001 - $100,000	Dividend	$250,001 - $500,000	Cash/Market
8-R.	- New York NY GO BDS DTD	$1,001 - $2,500	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Matured	Aug 1, 2025	$15,001 - $50,000

8-S.	- ORANGE CNTY FLA HEALTH FACS	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 13, 2025	$50,001 - $100,000

8-T.	- Nassau CNTY NY GO IMPT BDS LT SER A AGM APR21 05.000%APR01 2028	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
8-U.	- Colorado Health Facs Auth Rev BDS Ser A-1 Aug 19 5%Aug01 2028	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-V.	- University Colo Hosp Auth Rev REF BDS Ser B Aug24 5%NOV15 2031	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market
8-W.	- MET NSH-DVD CO TN SPORT AT RV JUL01 2038	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-X.	- Rochester Minn Health Care Facs NOV 2029	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
8-Y.	- Birmingham Ala WTRWKS BRD WTR REV Sr REf Jan01 2034	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-Z.	- NB Private Markets Fund III (f/k/a Excelsior)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Redeemed	Jun 30, 2025	$50,001 - $100,000

8-AA.	- IShares Core S&P Mid Cap ETF	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
8-AB.	- Massachusetts St Dev Fin AGY Rev BDS Mass 2 GTD 5%Nov30 2026	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market
8-AC.	- Dallas Ft Worth Tex Intl ARPT REV JT NOV01 2031	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-AD.	- JPMorgan TR I Emerging Mkts Equity FD Select	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
8-AE.	- Colorado Health Facs Auth Rev BDS Ser B Jun24 5%May15 2034	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market
8-AF.	- Vanguard Growth ETF P1	$15,001 - $50,000	Dividend	$1,000,001 - $5,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jun 18, 2025	$15,001 - $50,000
(2).	Sold (part)	Jul 11, 2025	$15,000 or less
(3).	Sold (part)	Sep 15, 2025	$50,001 - $100,000
(4).	Sold (part)	Dec 11, 2025	$15,000 or less

8-AG.	- Allspring Special Small Cap Value Fund Cl Instl (f/k/a Wells Fargo)	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market
8-AH.	- ILLINOIS ST GO BDS SER B NOV19 05.000%NOV01 2031	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
8-AI.	- South Carolina Jobs-Economic D Ref Impt Bds DTD	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
8-AJ.	- Artisan International Value Fund	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market
8-AK.	- IShares Floating Rate Bond ETF	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

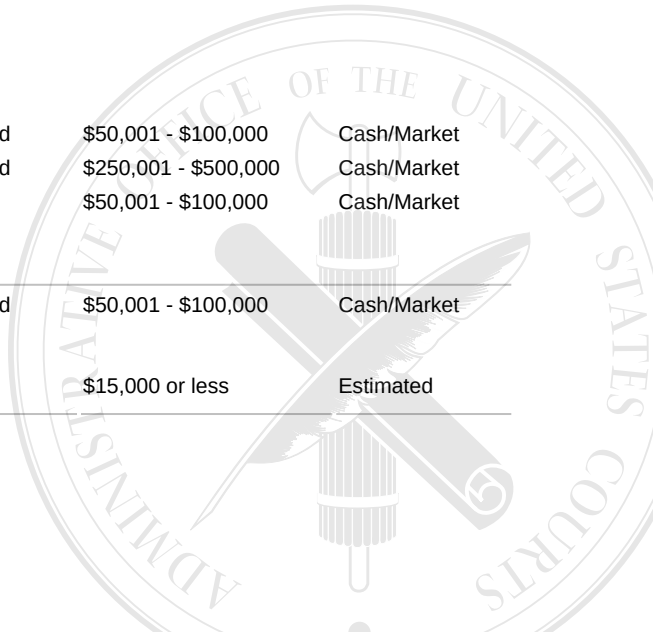
Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jun 10, 2025	$15,000 or less

8-AL.	- Blackrock Liquidity Fedfund Institutional Class	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
8-AM.	- Hamilton Southeastn IND CONS AD SER B SCH GTD JUL15 2037		None	$100,001 - $250,000	Cash/Market

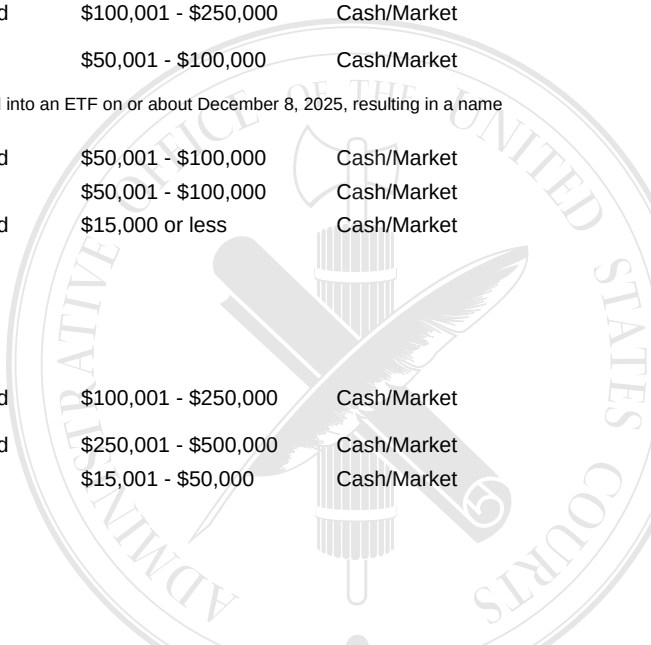
	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Oct 23, 2025 $100,001 - $250,000				
8-AN.	- Southcentral PA Gen Auth Rev BDS DTD	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-AO.	- University Tex Revs Ginf SYS BDS Ser A May24 5%Aug15 2032	$2,501 - $5,000	Interest		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Aug 4, 2025 $50,001 - $100,000				
8-AP.	- Janus Henderson Enterprise Fund CL	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market
8-AQ.	- University Mass BLDG Auth Rev SR REF BDS 1 MAR21 05.000%NOV01 2026	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-AR.	- Natixis Loomis Sayles Growth Fund CL	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jun 10, 2025 $15,000 or less				
8-AS.	- DEKALB CO IL CMNTY USD NO 428 JAN01 2029	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-AT.	- Frisco Tex Indpt Sch Dist Unltd Tax B Psf GTD Feb2032		None	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Nov 18, 2025 $100,001 - $250,000				
8-AU.	- District Columbia Hosp Rev Ref BDS DTD	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) May 13, 2025 $50,001 - $100,000				
8-AV.	- Clearbridge Small Cap Growth Fund CL IS	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market
8-AW.	- NC MPA NO 1 Catawba Elec Rev Bds JAN 2027	$2,501 - $5,000	Interest		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Oct 24, 2025 $50,001 - $100,000				
8-AX.	- IShares Short-Term National Muni Bond ETF	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Jun 18, 2025 $100,001 - $250,000				
	(2). Buy (add'l) Dec 24, 2025 $100,001 - $250,000				
8-AY.	- Vanguard FTSE Developed Markets ETF	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
8-AZ.	- NY ST DORM AUTH REVS NON ST SCH SER A	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-BA.	- Gunter Tex INDPT SCH DIST UNTLD DEB15 2037	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-BB.	- Delaware VY PA RFA LCL GOVT RV LOC GOVT A AMBAC AUG98 05.500%AUG01 2	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Aug 1, 2025 $15,000 or less				
8-BC.	- Harris Cnty Tex Perm Impt Ref Bds OCT 2024	$5,001 - $15,000	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 25, 2025 $100,001 - $250,000				
8-BD.	- Lake Cook KANE-ETC IL CUSD#220		None	$100,001 - $250,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Aug 4, 2025 $100,001 - $250,000				
8-BE.	- Federated Hermes STR Value Dividend FD CL IS	$15,001 - $50,000	Dividend	$500,001 - $1,000,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Dec 11, 2025 $15,001 - $50,000				
8-BF.	- TRIBOROUGH BRDG & TUNL AUTH NOV15 2026	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
8-BG.	- District Columbia GO BDS SER A MAR23 05.000%AUG01 2028	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-BH.	- Southeast ERGY AT COOP DT AL BDS SER H		None	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Dec 1, 2025 $50,001 - $100,000				
8-BI.	- Vanguard Mid-Cap Growth Index Fund	$1,001 - $2,500	Dividend	$250,001 - $500,000	Cash/Market
8-BJ.	- Wilwood UTIL DEPENDENT DIST FLA OCT01 2030	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-BK.	- Atlanta & Fulton Cnty GA Rec Auth Rev Ref BDS OK SEP24 5% DEC01 2029	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Mar 10, 2025 $50,001 - $100,000				
8-BL.	- Pennsylvania ST TPK Common TPK REV BDS DTD	$1,001 - $2,500	Interest		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Oct 24, 2025 $50,001 - $100,000				
8-BM.	- Vanguard FTSE Emerging Mkts ETF	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Jun 18, 2025 $50,001 - $100,000				
8-BN.	- Pembroke Pines FLA Cap IMPT RE	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-BO.	- New York St Dorm Aust St Pers Income Tax Rev MAR 2035	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
8-BP.	- New Jersey ST COVID 19 GO EMERGENCY BDS SER A NOV20 04.00%JUN01 2030	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
8-BQ.	- Colorado St CTFS Partn Natl Westn CTR Lease Mar18 5%Sep04 2028	$2,501 - $5,000	Interest	$50,001 - $100,000	Cash/Market
9.	**(H) Trust #3 (H)**				
9-A.	-GS U.S. Equity Dividend and Premium Fund Institutional Shares	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
9-B.	- IShares Short-Term ETF Corporate Bond ETF	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Oct 9, 2025 $15,000 or less				
	(2). Sold (part) Nov 11, 2025 $15,000 or less				
9-C.	- Goldman Sachs Bank USA Deposit (BDA)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
9-D.	- Goldman Sachs ETF Trust (previously GS Tech Opp Fund)		None	$50,001 - $100,000	Cash/Market
	Additional Explanation: The GS Technology Opportunities Fund converted from a mutual fund into an ETF on or about December 8, 2025, resulting in a name change for the investment.				
9-E.	- GS U.S. Equity Insights Fund Class	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
9-F.	- GS Strategic Factor Allocation Fund Institutional	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Apr 4, 2025 $15,000 or less				
	(2). Sold (part) Apr 15, 2025 $15,000 or less				
9-G.	- GS International Small Cap Insights Fund	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
9-H.	- GS International Equity Insights Fund	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market
9-I.	- GS Small/MID Cap Growth Fund Class		None	$50,001 - $100,000	Cash/Market
10.	**(H) Investment Account #3 (H)**				
10-A.	- VanguardSmall Cap Index Fund	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
11.	**Undeveloped Land, Bamberg County, South Carolina #4 (50% interest) NoneW**		None	$15,000 or less	Estimated



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
12.	**Undeveloped Land, Bamberg County, South Carolina #2 (50% interest) NoneW**		None	$15,001 - $50,000	Estimated
13.	**(H) Trust #1 (H)**				
13-A.	- Goldman Sachs ETF Trust (previously GS Tech Opp Fund)		None	$50,001 - $100,000	Cash/Market
	Additional Explanation: The GS Technology Opportunities Fund converted from a mutual fund into an ETF on or about December 8, 2025, resulting in a name change for the investment.				
13-B.	- GS Small/MID Cap Growth Fund Class		None	$50,001 - $100,000	Cash/Market
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold (part)	Apr 9, 2025	$15,000 or less	
	(2).	Sold (part)	Nov 11, 2025	$15,000 or less	
13-C.	- GS U.S. Equity Insights Fund Class	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold (part)	Jan 8, 2025	$15,000 or less	
13-D.	- GS U.S. Equity Dividend and Premium Fund Institutional Shares	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
13-E.	- Goldman Sachs Bank USA Deposit (BDA)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
13-F.	- GS International Small Cap Insights Fund	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
13-G.	- GS International Equity Insights Fund	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
13-H.	- IShares Short-Term ETF Corporate Bond ETF	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold (part)	Jan 8, 2025	$15,000 or less	
	(2).	Sold (part)	Oct 9, 2025	$15,000 or less	
	(3).	Sold (part)	Nov 11, 2025	$15,000 or less	
14.	**Undeveloped Land, Bamberg County, South Carolina #3 (50% interest) NoneW**		None	$15,000 or less	Estimated
15.	**(H) Insurance Trust #2 (H)**				
15-A.	- Genworth Universal Life	$5,001 - $15,000	Interest	$100,001 - $250,000	Cash/Market
16.	**Undeveloped Land, Florence County, South Carolina (16.6% interest) NoneW**		None	$15,000 or less	Estimated
17.	**(H) Trust #4 (H)**				
17-A.	- GS Strategic Factor Allocation Fund Institutional	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold (part)	Apr 4, 2025	$15,000 or less	
	(2).	Sold (part)	Apr 15, 2025	$15,000 or less	
17-B.	- GS U.S. Equity Insights Fund Class	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
17-C.	- Goldman Sachs ETF Trust (previously GS Tech Opp Fund)		None	$50,001 - $100,000	Cash/Market
	Additional Explanation: The GS Technology Opportunities Fund converted from a mutual fund into an ETF on or about December 8, 2025, resulting in a name change for the investment.				
17-D.	- GS International Small Cap Insights Fund	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
17-E.	- GS Small/MID Cap Growth Fund Class		None	$50,001 - $100,000	Cash/Market
17-F.	- IShares Short-Term ETF Bond ETF	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Transactions	**Transaction Type**	**Transaction Date**	**Transaction Value**	
	(1).	Sold (part)	Oct 9, 2025	$15,000 or less	
	(2).	Sold (part)	Nov 11, 2025	$15,000 or less	
17-G.	- GS U.S. Equity Dividend and Premium Fund Institutional Shares	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
17-H.	- GS International Equity Insights Fund	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market
17-I.	- Goldman Sachs Bank USA Deposit (BDA)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
18.	**(H) Insurance Trust #1 (H)**				
18-A.	- Prudential Whole Life	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
19.	**(H) Investment Account #1 (H)**				
19-A.	- Vanguard FTSE Developed MKTS CMN ETF	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
19-B.	- SPDR S&P Dividend ETF	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
19-C.	- Goldman Sachs Bank USA Deposit (BDA)	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
20.	**(H) Real Estate Corporation (16.6% interest) (H)**				
20-A.	- Undeveloped Tracts A, B, C, D, Barnwell County, South Carolina		None	$50,001 - $100,000	Estimated
20-B.	- First Citizens Bank - Cash Account	$1,000 or less	Interest	$15,000 or less	Cash/Market
21.	**Undeveloped Land, Barnwell County, South Carolina #3 (16.6% interest) NoneW**		None	$15,000 or less	Estimated
22.	**Undeveloped Land, Barnwell County, South Carolina #2 (20% interest) NoneW**		None	$50,001 - $100,000	Estimated
23.	**(H) Trust #10 (33.3% interest) (H)**				
23-A.	- GS Short Duration Tax Free Fund Class P	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Buy Oct 10, 2025 $250,001 - $500,000				
23-B.	- SPD S&P Dividend ETF	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
23-C.	- GS High Yield Floating Rate Fund Class	$15,001 - $50,000	Dividend		
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Oct 9, 2025 $250,001 - $500,000				
23-D.	- Amex Consumers Staples Select Fund 'SDPDR'	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
23-E.	- Goldman Sachs Bank USA Deposit (BDA)	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
24.	**Undeveloped Land, Barnwell County, South Carolina #1 (33.3% interest) A RentW**	$1,000 or less	Rent	$15,001 - $50,000	Estimated
25.	**(H) Investment Account #2 (H)**				
25-A.	- Fidelity Target Retirement 2040 Fund (formerly Vanguard 2040)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
26.	**Goldman Sachs - Cash Account #3**	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
27.	**(H) Real Estate LLC #1 (H)**				
27-A.	- Goldman Sachs - Cash Account	$1,000 or less	Interest	$15,000 or less	Cash/Market
27-B.	- Undeveloped Tract, Charleston County, South Carolina		None	$100,001 - $250,000	Estimated
28.	**Undeveloped Land, Bamberg County, South Carolina #1 (25% interest) NoneW**		None	$15,000 or less	Estimated
29.	**(H) Trust #6 (H)**				
29-A.	- Vanguard FTSE Developed Mkts CMN ETF	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
29-B.	- SPDR S&P DIVIDEND ETF E DividendT	$15,001 - $50,000	Dividend	$500,001 - $1,000,000	Cash/Market
29-C.	- GS Short Duration Tax Free Fund Class P	$2,501 - $5,000	Dividend	$250,001 - $500,000	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Oct 10, 2025	$250,001 - $500,000
(2).	Buy (add'l)	Oct 22, 2025	$250,001 - $500,000
(3).	Sold (part)	Nov 5, 2025	$100,001 - $250,000
(4).	Sold (part)	Dec 11, 2025	$100,001 - $250,000

29-D.	- GS High Yield Floating Rate Fund Class	$15,001 - $50,000	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Oct 9, 2025	$250,001 - $500,000

29-E.	- ALPS ETF Trust - Alerian MLP E Cmn	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 14, 2025	$15,001 - $50,000
(2).	Sold (part)	Oct 22, 2025	$250,001 - $500,000

29-F.	- Goldman Sachs Bank USA Deposit (BDA)	$1,001 - $2,500	Interest	$15,001 - $50,000	Cash/Market
30.	**(H) Trust #2 (H)**				
30-A.	- Goldman Sachs ETF Trust (previously GS Tech Opp Fund)		None	$50,001 - $100,000	Cash/Market

Additional Explanation: The GS Technology Opportunities Fund converted from a mutual fund into an ETF on or about December 8, 2025, resulting in a name change for the investment.

30-B.	- GS Small/MID Cap Growth Fund Class		None	$50,001 - $100,000	Cash/Market
30-C.	- Goldman Sachs Bank USA Deposit (BDA)	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
30-D.	- GS U.S. Equity Insights Fund Class	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
30-E.	- GS International Small Cap Insights Fund	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
30-F.	- GS U.S. Equity Dividend and Premium Fund Institutional Shares	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
30-G.	- GS Strategic Factor Allocation Fund Institutional	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

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

30-H.	- GS International Equity Insights Fund	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
30-I.	- IShares Short-Term ETF Corporate Bond ETF	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 29, 2025	$15,000 or less
(2).	Sold (part)	Oct 9, 2025	$15,000 or less
(3).	Sold (part)	Nov 11, 2025	$15,000 or less

31.	**(H) Real Estate LLC #3 (32.1% interest) (H)**				
31-A.	- First Citizens Bank - Cash Account	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
31-B.	- Real Estate Property, Colleton County		None	$250,001 - $500,000	Estimated
32.	**Bank of America - Cash Account #2**	$1,000 or less	Interest	$100,001 - $250,000	Cash/Market
33.	**Undeveloped Land, Barnwell County, South Carolina #4 (25% interest) A RentW**	$1,000 or less	Rent	$15,000 or less	Estimated

VIII. Additional Information or Explanations

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