



Filing ID #10057068

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Christopher Deluzio
Status: Member
State/District: PA17

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/12/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
529 Account 1 - Child 1 ⇒ Target Enrollment 2040 [5F] LOCATION: NY		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 Account 1 - Child 2 ⇒ Target Enrollment 2038 [5F] LOCATION: NY		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 Account 2 - Child 2 ⇒ PA Target Enrollment 2038/2039 [5F] LOCATION: PA		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 Account 2 - Child 1 ⇒ PA Target Enrollment 2036/2037 [5F] LOCATION: PA		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 Account 2 - Child 3 ⇒ PA Target Enrollment 2038/2039 [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Goldman Sachs Access Treasury 0-1 Year ETF (GBIL) [EF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]	SP	None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMorgan Deposit Account [BA]	SP	\$1 - \$1,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMorgan U.S.Government Money Market Capital (OGVXX) [MF] DESCRIPTION: Money market fund	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Series Trust SPDR Portfolio S&P 500 Value ETF (SPYV) [EF]	SP	None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Emerging Markets Government Bond ETF (VWOB) [EF]	SP	None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Value ETF (VTV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Betterment - 0407 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF] DESCRIPTION: Transferred to JPM SEP IRA	SP	None	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Betterment - 0407 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF] DESCRIPTION: Transferred to JPM SEP IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 0407 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF] DESCRIPTION: Transferred to JPM SEP IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 0407 ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF] DESCRIPTION: Transferred to JPM SEP IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 0407 ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF] DESCRIPTION: Transferred to JPM SEP IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 0407 ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF] DESCRIPTION: Transferred to JPM SEP IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 0407 ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF] DESCRIPTION: Transferred to JPM SEP IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 0407 ⇒ TCW Transform 500 ETF (VOTE) [EF] DESCRIPTION: Transferred to JPM SEP IRA; previously reported as Engine No. 1 Transform 500 ETF (VOTE)	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 0407 ⇒ Vanguard Total International Bond ETF (BNDX) [EF] DESCRIPTION: Transferred to JPM SEP IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 2999 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF] DESCRIPTION: Transferred to JPM - Roth IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 2999 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF] DESCRIPTION: Transferred to JPM - Roth IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 2999 ⇒ Schwab International Equity ETF (SCHF) [EF] DESCRIPTION: Transferred to JPM - Roth IRA	SP	None	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Betterment - 2999 ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF] DESCRIPTION: Transferred to JPM - Roth IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 2999 ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF] DESCRIPTION: Transferred to JPM - Roth IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 2999 ⇒ Vanguard Total International Bond ETF (BNDX) [EF] DESCRIPTION: Transferred to JPM - Roth IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 4754 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF] DESCRIPTION: Transferred to JPM - IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 4754 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF] DESCRIPTION: Transferred to JPM - IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 4754 ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF] DESCRIPTION: Transferred to JPM - IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 4754 ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF] DESCRIPTION: Transferred to JPM - IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 4754 ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF] DESCRIPTION: Transferred to JPM - IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 4754 ⇒ TCW Transform 500 ETF (VOTE) [EF] DESCRIPTION: Transferred to JPM - IRA; previously reported as Engine No. 1 Transform 500 ETF (VOTE)	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 4754 ⇒ Vanguard Total International Bond ETF (BNDX) [EF] DESCRIPTION: Transferred to JPM - IRA	SP	None	Tax-Deferred		<input type="checkbox"/>
Betterment - 8293 ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]	SP	None	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Transferred to JPM Brokerage					
Betterment -8293 ⇒ iShares MSCI ACWI Low Carbon Target ETF (CRBN) [EF]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to JPM Brokerage					
Betterment -8293 ⇒ iShares USD Green Bond ETF (BGRN) [EF]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to JPM Brokerage					
Betterment -8293 ⇒ SPDR MSCI EAFE Fossil Fuel Reserves Free ETF (EFAX) [EF]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to JPM Brokerage					
Betterment -8293 ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to JPM Brokerage					
Betterment -8293 ⇒ SPDR Nuveen Bloomberg Municipal Bond ETF (TFI) [EF]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to JPM Brokerage					
Betterment -8293 ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to JPM Brokerage					
Betterment -8293 ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to JPM Brokerage; previously reported as Engine No. 1 Transform 500 ETF (VOTE)					
Betterment -8293 ⇒ Vanguard Short-Term Inflation-Protected Securities Index Fund ETF Shares (VTIP) [EF]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to JPM Brokerage					
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM		None	Dividends	\$201 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brokerage ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]				\$1,000	<input type="checkbox"/>
DESCRIPTION: Sold for a loss					
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Russell 2000 Value ETF (IWN) [EF]		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMORGAN DEPOSIT ACCT B [BA]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMorgan U.S.Government Money Market Capital (OGVXX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Emerging Markets Government Bond ETF (VWOB) [EF]		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Value ETF (VTV) [EF]		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P Morgan -Checking & Savings [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
J.P. Morgan - Checking & Savings [BA]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
J.P. Morgan - Checking & Savings [BA]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ JPMorgan Deposit Account [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
J.P. Morgan -4265 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ United States Treasury Due 3/16/23 [GS] DESCRIPTION: Fully matured	DC	None	Interest	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ JPMorgan Deposit Acct [BA] DESCRIPTION: Child 2 JPM	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ United States Treasury Due 3/16/23 [GS] DESCRIPTION: Fully matured	DC	None	Interest	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ JPMorgan Deposit Acct [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Child 3 JPM					
J.P. Morgan -6872 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ United States Treasury Due 3/16/23 [GS]	DC	None	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Fully matured					
J.P. Morgan -6872 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
JPM - IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 4754					
JPM - IRA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 4754					
JPM - IRA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 4754					
JPM - IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	None	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 4754; sale less than \$1,000.					
JPM - IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 4754					
JPM - IRA ⇒ JPMorgan Deposit Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JPM - IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - IRA ⇒ TCW Transform 500 ETF (VOTE) [EF] DESCRIPTION: Transferred from Betterment - 4754	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF] DESCRIPTION: Transferred from Betterment - 4754	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - JPMS LLC IRA ⇒ JPMorgan Deposit Account [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - JPMS LLC IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - JPMS LLC IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - JPMS LLC IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JPM - JPMS LLC IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Rollover IRA ⇒ JPMorgan Deposit Account [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - Rollover IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Rollover IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Rollover IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Rollover IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Rollover IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF] DESCRIPTION: Transferred from Betterment - 2999	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF] DESCRIPTION: Transferred from Betterment - 2999	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JPMorgan Deposit Account [BA]					
JPM - Roth IRA ⇒ Schwab International Equity ETF (SCHF) [EF]	SP	None	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 2999; sale less than \$1,000					
JPM - Roth IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 2999					
JPM - Roth IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 2999					
JPM - Roth IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 2999					
JPM Brokerage ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]	SP	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 8293; sold for an overall loss					
JPM Brokerage ⇒ iShares MSCI ACWI Low Carbon Target ETF (CRBN) [EF]	SP	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 8293; sold for an overall loss					
JPM Brokerage ⇒ iShares USD Green Bond ETF (BGRN) [EF]	SP	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 8293; sold for an overall loss					
JPM Brokerage ⇒ JPMorgan U.S.Government Money Market Capital (OGVXX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Money Market Fund					
JPM Brokerage ⇒ SPDR MSCI EAFE Fossil Fuel Reserves Free ETF (EFAX) [EF]	SP	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 8293; sold for an overall loss					
JPM Brokerage ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF]	SP	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 8293; sold for an overall loss					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JPM Brokerage ⇒ SPDR Nuveen Bloomberg Municipal Bond ETF (TFI) [EF]	SP	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 8293; sold for an overall loss					
JPM Brokerage ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF]	SP	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 8293; sold for an overall loss					
JPM Brokerage ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
JPM Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
JPM Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
JPM Brokerage ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 8293; sold for an overall loss					
JPM Brokerage ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
JPM Brokerage ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
JPM Brokerage ⇒ Vanguard Short-Term Inflation-Protected Securities Index Fund ETF Shares (VTIP) [EF]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 8293; sale less than \$1,000 for a loss.					
JPM Roth IRA ⇒ JPMorgan Deposit Account [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM Roth IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM Roth IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM Roth IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SPDR Select Sector Fund - Technology (XLK) [EF]					
JPM Roth IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM Roth IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF] DESCRIPTION: Transferred from Betterment - 0407	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF] DESCRIPTION: Transferred from Betterment - 0407	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF] DESCRIPTION: Transferred from Betterment - 0407	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF] DESCRIPTION: Transferred from Betterment - 0407	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF] DESCRIPTION: Transferred from Betterment - 0407	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF] DESCRIPTION: Transferred from Betterment - 0407	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ JPMorgan Deposit Account [BA]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM SEP IRA ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF] DESCRIPTION: Transferred from Betterment - 0407	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JPM SEP IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ TCW Transform 500 ETF (VOTE) [EF] DESCRIPTION: Transferred from Betterment - 0407	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF] DESCRIPTION: Transferred from Betterment - 0407	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>

* Investment vehicle details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
529 Account 1 - Child 1 ⇒ Aggressive Growth Portfolio [5F] LOCATION: NY		07/28/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
529 Account 1 - Child 1 ⇒ Target Enrollment 2040 [5F] LOCATION: NY		07/28/2023	P	\$15,001 - \$50,000	
529 Account 1 - Child 2 ⇒ Aggressive Growth Portfolio [5F] LOCATION: NY		07/28/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
529 Account 1 - Child 2 ⇒ Target Enrollment 2038 [5F] LOCATION: NY		07/28/2023	P	\$50,001 - \$100,000	
529 Account 2 - Child 2 ⇒ PA Target Enrollment 2038/2039 [5F] LOCATION: PA		12/29/2023	P	\$15,001 - \$50,000	
529 Account 2 - Child 1 ⇒ PA Target Enrollment 2036/2037 [5F] LOCATION: PA		12/29/2023	P	\$15,001 - \$50,000	
529 Account 2 - Child 3 ⇒ PA Target Enrollment 2038/2039 [5F] LOCATION: PA		12/29/2023	P	\$15,001 - \$50,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Goldman Sachs Access Treasury 0-1 Year ETF (GBIL) [EF]	SP	02/27/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	02/27/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	SP	02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	02/27/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	SP	02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]	SP	02/27/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]	SP	02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM	SP	02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Brokerage ⇒ SPDR Nuveen Bloomberg Municipal Bond ETF (TFI) [EF]					
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	03/2/2023	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	03/2/2023	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	03/2/2023	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Series Trust SPDR Portfolio S&P 500 Value ETF (SPYV) [EF]	SP	02/27/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	03/2/2023	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	03/2/2023	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Emerging Markets Government Bond ETF (VWOB) [EF]	SP	02/27/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	02/27/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	03/1/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Short-Term Inflation-Protected Securities Index	SP	02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fund ETF Shares (VTIP) [EF]					
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	03/1/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	02/27/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	03/1/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares National Muni Bond ETF (MUB) [EF]		02/27/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Russell 2000 Value ETF (IWN) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Short Treasury Bond ETF (SHV) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Nuveen Bloomberg Municipal Bond ETF (TFI) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		03/2/2023	P	\$1,001 - \$15,000	
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		03/2/2023	P	\$1,001 - \$15,000	
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		03/2/2023	P	\$1,001 - \$15,000	
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		03/2/2023	P	\$1,001 - \$15,000	
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		03/2/2023	P	\$1,001 - \$15,000	
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Emerging Markets Government Bond ETF (VWOB) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		02/27/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		12/21/2023	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Short-Term Inflation-Protected Securities Index Fund ETF Shares (VTIP) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM		02/27/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Brokerage ⇒ Vanguard Total International Bond ETF (BNDX) [EF]					
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Value ETF (VTV) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	03/31/2023	P	\$15,001 - \$50,000	
J.P. Morgan -4265 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	06/5/2023	P	\$15,001 - \$50,000	
J.P. Morgan -4265 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	06/5/2023	P	\$1,001 - \$15,000	
J.P. Morgan -4265 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	06/5/2023	P	\$1,001 - \$15,000	
J.P. Morgan -4265 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	06/5/2023	P	\$1,001 - \$15,000	
J.P. Morgan -4404 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	03/31/2023	P	\$15,001 - \$50,000	
J.P. Morgan -4404 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	06/5/2023	P	\$1,001 - \$15,000	
J.P. Morgan -4404 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	06/5/2023	P	\$1,001 - \$15,000	
J.P. Morgan -4404 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	06/5/2023	P	\$1,001 - \$15,000	
J.P. Morgan -4404 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	06/5/2023	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	03/31/2023	P	\$15,001 - \$50,000	
J.P. Morgan -6872 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	06/5/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
J.P. Morgan -6872 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	06/2/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	06/5/2023	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	06/5/2023	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	06/2/2023	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	06/5/2023	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	06/5/2023	P	\$1,001 - \$15,000	
JPM - IRA ⇒ Invesco Emerging Markets Sovereign Debt ETF (PCY) [EF]	SP	01/13/2023	P	\$1,001 - \$15,000	
JPM - IRA ⇒ Invesco Emerging Markets Sovereign Debt ETF (PCY) [EF]	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF] DESCRIPTION: Transferred from Betterment - 4754	SP	01/13/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
JPM - IRA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF] DESCRIPTION: Transferred from Betterment - 4754	SP	03/10/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
JPM - IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	01/13/2023	P	\$1,001 - \$15,000	
JPM - IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - IRA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF] DESCRIPTION: Transferred from Betterment - 4754	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPM - IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 4754					
JPM - IRA ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	01/13/2023	P	\$15,001 - \$50,000	
JPM - IRA ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	03/10/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
JPM - IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	03/10/2023	P	\$15,001 - \$50,000	
JPM - IRA ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]	SP	01/13/2023	P	\$1,001 - \$15,000	
JPM - IRA ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	03/10/2023	P	\$15,001 - \$50,000	
JPM - IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	03/10/2023	P	\$15,001 - \$50,000	
JPM - IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	03/10/2023	P	\$15,001 - \$50,000	
JPM - IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 4754					
JPM - IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	03/10/2023	P	\$15,001 - \$50,000	
JPM - IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	03/10/2023	P	\$15,001 - \$50,000	
JPM - IRA ⇒	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Total International Bond ETF (BNDX) [EF]					
DESCRIPTION: Transferred from Betterment - 4754					
JPM - JPMS LLC IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		02/27/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		02/27/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		02/27/2023	P	\$15,001 - \$50,000	
JPM - JPMS LLC IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		02/27/2023	P	\$15,001 - \$50,000	
JPM - JPMS LLC IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		02/27/2023	P	\$15,001 - \$50,000	
JPM - JPMS LLC IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		02/27/2023	P	\$15,001 - \$50,000	
JPM - JPMS LLC IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		02/27/2023	P	\$15,001 - \$50,000	
JPM - JPMS LLC IRA ⇒		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Total International Bond ETF (BNDX) [EF]					
JPM - Rollover IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		02/27/2023	P	\$1,001 - \$15,000	
JPM - Rollover IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		02/27/2023	P	\$1,001 - \$15,000	
JPM - Rollover IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		02/27/2023	P	\$1,001 - \$15,000	
JPM - Rollover IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		02/27/2023	P	\$1,001 - \$15,000	
JPM - Rollover IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		02/27/2023	P	\$1,001 - \$15,000	
JPM - Roth IRA ⇒ Invesco Emerging Markets Sovereign Debt ETF (PCY) [EF]	SP	12/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - Roth IRA ⇒ Invesco Emerging Markets Sovereign Debt ETF (PCY) [EF]	SP	01/20/2023	P	\$1,001 - \$15,000	
JPM - Roth IRA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	SP	02/6/2023	P	\$50,001 - \$100,000	
JPM - Roth IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	02/6/2023	P	\$1,001 - \$15,000	
JPM - Roth IRA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]	SP	01/20/2023	P	\$1,001 - \$15,000	
JPM - Roth IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	01/20/2023	P	\$1,001 - \$15,000	
JPM - Roth IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	02/6/2023	P	\$1,001 - \$15,000	
JPM - Roth IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	12/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPM Brokerage ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF] DESCRIPTION: Transferred from Betterment-8293	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Brokerage ⇒ iShares MSCI ACWI Low Carbon Target ETF (CRBN) [EF] DESCRIPTION: Transferred from Betterment-8293	SP	03/10/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
JPM Brokerage ⇒ iShares USD Green Bond ETF (BGRN) [EF] DESCRIPTION: Transferred from Betterment-8293	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Brokerage ⇒ SPDR MSCI EAFE Fossil Fuel Reserves Free ETF (EFAX) [EF] DESCRIPTION: Transferred from Betterment-8293	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Brokerage ⇒ SPDR MSCI Emerging Markets Fuel Reserves Free ETF (EEMX) [EF] DESCRIPTION: Transferred from Betterment-8293	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Brokerage ⇒ SPDR Nuveen Bloomberg Municipal Bond ETF (TFI) [EF] DESCRIPTION: Transferred from Betterment-8293	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Brokerage ⇒ SPDR S&P 500 Fossil Fuel Reserves Free ETF (SPYX) [EF] DESCRIPTION: Transferred from Betterment-8293	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Brokerage ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	03/10/2023	P	\$1,001 - \$15,000	
JPM Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	03/10/2023	P	\$1,001 - \$15,000	
JPM Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	03/10/2023	P	\$1,001 - \$15,000	
JPM Brokerage ⇒ TCW Transform 500 ETF (VOTE) [EF] DESCRIPTION: Transferred from Betterment-8293	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPM Brokerage ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	03/10/2023	P	\$1,001 - \$15,000	
JPM Brokerage ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	03/10/2023	P	\$1,001 - \$15,000	
JPM Roth IRA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		02/27/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
JPM Roth IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Roth IRA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Roth IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Roth IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Roth IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		02/27/2023	P	\$15,001 - \$50,000	
JPM Roth IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		02/27/2023	P	\$15,001 - \$50,000	
JPM Roth IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		02/27/2023	P	\$15,001 - \$50,000	
JPM Roth IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM Roth IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		02/27/2023	P	\$15,001 - \$50,000	
JPM Roth IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		02/27/2023	P	\$15,001 - \$50,000	
JPM Roth IRA ⇒		02/27/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard FTSE Developed Markets ETF (VEA) [EF]					<input type="checkbox"/>
JPM Roth IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		02/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM SEP IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	03/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 0407					
JPM SEP IRA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	SP	03/1/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 0407					
JPM SEP IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	03/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 0407					
JPM SEP IRA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]	SP	03/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM SEP IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	03/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 0407					
JPM SEP IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]	SP	03/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM SEP IRA ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	01/3/2023	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ iShares MSCI USA ESG Select ETF (SUSA) [EF]	SP	03/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM SEP IRA ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	SP	03/7/2023	P	\$15,001 - \$50,000	
JPM SEP IRA ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	SP	05/15/2023	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	SP	06/2/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPM SEP IRA ⇒ Schwab International Equity ETF (SCHF) [EF]	SP	01/3/2023	P	\$15,001 - \$50,000	
JPM SEP IRA ⇒ Schwab International Equity ETF (SCHF) [EF]	SP	03/1/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
JPM SEP IRA ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]	SP	01/3/2023	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]	SP	03/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM SEP IRA ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]	SP	03/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 0407					
JPM SEP IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	03/1/2023	P	\$15,001 - \$50,000	
JPM SEP IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	12/12/2023	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	03/1/2023	P	\$15,001 - \$50,000	
JPM SEP IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	06/2/2023	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	12/12/2023	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	03/1/2023	P	\$15,001 - \$50,000	
JPM SEP IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	03/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Transferred from Betterment - 0407					
JPM SEP IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	03/1/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPM SEP IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	12/12/2023	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	03/1/2023	P	\$15,001 - \$50,000	
JPM SEP IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	12/12/2023	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF] DESCRIPTION: Transferred from Betterment - 0407	SP	03/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 401a ⇒ TIAA Traditional [FN]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 401a ⇒ Vanguard Developed Markets Index Institutional Plus (VDIPX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 401a ⇒ Vanguard Emerging Markets Stock Index Fund Admiral Shares (VEMAX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 401a ⇒ Vanguard Index Trust Total Stock Market Index Fund (VTSMX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 401a ⇒ Vanguard Real Estate Index Fund Institutional Shares (VGSNX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 403b ⇒ TIAA Traditional [FN]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 403b ⇒ Vanguard Developed Markets Index Institutional Plus (VDIPX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 403b ⇒ Vanguard Emerging Markets Stock Index Fund Admiral Shares (VEMAX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA ⇒ 403b ⇒ Vanguard Index Trust Total Stock Market Index Fund (VTSMX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 403b ⇒ Vanguard Real Estate Index Fund Institutional Shares (VGSNX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 403b supplemental ⇒ TIAA Traditional [FN]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 403b supplemental ⇒ Vanguard Developed Markets Index Institutional Plus (VDIPX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 403b supplemental ⇒ Vanguard Emerging Markets Stock Index Fund Admiral Shares (VEMAX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 403b supplemental ⇒ Vanguard Index Trust Total Stock Market Index Fund (VTSMX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA ⇒ 403b supplemental ⇒ Vanguard Real Estate Index Fund Institutional Shares (VGSNX) [MF]		02/3/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

* Investment vehicle details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Kobre & Kim LLP	Spouse Nonemployee compensation	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation Inc. (AIEF)	08/5/2023	08/12/2023	Newark, NJ - Tel Aviv, Israel - Pittsburgh, PA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">◦ 529 Account 1 - Child 1 LOCATION: NY◦ 529 Account 1 - Child 2 LOCATION: NY◦ 529 Account 2 - Child 2 LOCATION: PA◦ 529 Account 2 - Child 1 LOCATION: PA◦ 529 Account 2 - Child 3 LOCATION: PA◦ Alexandra Zoe Bunnell Revocable Living Trust (Owner: SP)◦ Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage (Owner: SP) LOCATION: US◦ Betterment - 0407 (Owner: SP)◦ Betterment - 2999 (Owner: SP)◦ Betterment - 4754 (Owner: SP)◦ Betterment -8293 (Owner: SP) LOCATION: US◦ Christopher R Deluzio Revocable Living Trust◦ Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage LOCATION: US◦ J.P. Morgan -4265 Consolidated (Owner: DC) LOCATION: US DESCRIPTION: Child 1 JPM Consolidated◦ J.P. Morgan -4404 Consolidated (Owner: DC)

LOCATION: US

DESCRIPTION: Child 2 JPM Consolidated

- J.P. Morgan -6872 Consolidated (Owner: DC)

LOCATION: US

DESCRIPTION: Child 3 JPM Consolidated

- JPM - IRA (Owner: SP)
- JPM - JPMS LLC IRA
- JPM - Rollover IRA
- JPM - Roth IRA (Owner: SP)
- JPM Brokerage (Owner: SP)
LOCATION: US
- JPM Roth IRA
- JPM SEP IRA (Owner: SP)
- TIAA
- TIAA ⇒ 401a
- TIAA ⇒ 403b
- TIAA ⇒ 403b supplemental

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Christopher Deluzio , 08/12/2024