



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Steven Merrill
Status: Congressional Candidate
State/District: UT02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 02/20/2026
Period Covered: 01/01/2025– 01/26/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Lake Michigan Credit Union Checking [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Lake Michigan Credit Union Savings [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
State Bank of Southern Utah CD [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
State Bank of Southern Utah CD [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
State Bank of Southern Utah Checking [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
State Bank of Southern Utah Money Market [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$201 - \$1,000
State Bank of Southern Utah Savings [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity SUU ⇒ Fidelity Freedom 2045 Fund: Class K6 (FJTKX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Life Insurance ⇒ National Life Universal Insurance ⇒ National Life Universal Insurance [WU]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Life Insurance ⇒ North American Life Insurance ⇒ North American Life Insurance [WU]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	\$1,001 - \$2,500
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ American Express Company Common Stock (AXP) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$2,501 - \$5,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ AstraZeneca PLC - American Depositary Shares (AZN) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Calamos Market Neutral Fd Cl I (CMNIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	None	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Catalyst/Millburn Hedge Strategy Fund Class I (MBXIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Caterpillar, Inc. Common Stock (CAT) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ CSX Corporation (CSX) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ DoorDash, Inc. - Common Stock (DASH) [ST]	SP	\$1,001 - \$15,000	Capital Gains	None	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch CMA ⇒	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 -	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Eli Lilly and Company Common Stock (LLY) [ST]				\$2,500	\$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ First Trust NASDAQ Clean Edge Smart Grid Infrastructure Index Fund (GRID) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]	SP	\$1,001 - \$15,000	Capital Gains	None	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]	SP	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Freeport-McMoRan, Inc. Common Stock (FCX) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Gilead Sciences, Inc. - Common Stock (GILD) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Guggenheim Total Return Bond Fund- Institutional Class (GIBIX) [MF]	SP	\$15,001 - \$50,000	Capital Gains	\$1 - \$200	\$5,001 - \$15,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Hartford Dynamic Bond Fund - Class I (HDBIX) [MF]	SP	\$15,001 - \$50,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Hewlett Packard Enterprise Company Common Stock (HPE) [ST]	SP	\$1,001 - \$15,000	Capital Gains	None	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Home Depot, Inc. (HD) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Interactive Brokers Group, Inc. - Class A Common Stock (IBKR) [ST]	SP	\$1 - \$1,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒	SP	\$1,001 - \$15,000	Capital Gains	\$201 -	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
International Business Machines Corporation Common Stock (IBM) [ST]				\$1,000	
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ iShares Core MSCI International Developed Markets ETF (IDEV) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ iShares Global Infrastructure ETF (IGF) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ iShares Gold Trust Shares (IAU) [EF]	SP	\$15,001 - \$50,000	Capital Gains	\$5,001 - \$15,000	\$2,501 - \$5,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ iShares Residential and Multisector Real Estate ETF (REZ) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Micron Technology, Inc. - Common Stock (MU) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1,001 - \$2,500
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Neuberger Berman Strategic Income Fund Institutional Class (NSTLX) [MF]	SP	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	\$1,001 - \$2,500
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	\$1,001 - \$2,500
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	\$1,001 - \$15,000	Capital Gains	None	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Progressive Corporation (PGR) [ST]	SP	\$1,001 - \$15,000	Capital Gains	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ RTX Corporation Common Stock (RTX) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Seagate Technology Holdings PLC - Ordinary Shares (STX) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Stryker Corporation Common Stock (SYK) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1,001 - \$2,500
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]	SP	\$1 - \$1,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ The Hartford International Value Fund Class I (HILIX) [MF]	SP	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ TJX Companies, Inc. (TJX) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ TPG Inc. - Class A Common Stock (TPG) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ VanEck Gold Miners ETF (GDX) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	\$2,501 - \$5,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Vertiv Holdings, LLC Class A Common Stock (VRT) [ST]	SP	\$1 - \$1,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Visa Inc. (V) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Walmart Inc. - Common Stock (WMT) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Waste Connections, Inc. Common Shares (WCN) [ST]	SP	\$1,001 - \$15,000	Capital Gains	None	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Wells Fargo & Company Common Stock (WFC) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒	SP	\$1,001 - \$15,000	Capital Gains	\$201 -	\$1,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Welltower Inc. Common Stock (WELL) [ST]				\$1,000	\$2,500
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Williams Companies, Inc. (WMB) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Workday, Inc. - Class A Common Stock (WDAY) [ST]	SP	\$1,001 - \$15,000	Capital Gains	None	None
Merrill Lynch ⇒ Merrill Lynch CMA ⇒ Xcel Energy Inc. (XEL) [ST]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$2,501 - \$5,000
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ BlackRock Eq Dividend I (MADVX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ BlackRock Liquidity Funds FedFund - Premier (BUPXX) [MF]	SP	\$1 - \$1,000	Capital Gains	None	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ Columbia Small Cap Value Fund I Class I (CSCZX) [MF]	SP	\$1 - \$1,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ First Trust NASDAQ Clean Edge Smart Grid Infrastructure Index Fund (GRID) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]	SP	\$1 - \$1,000	Capital Gains	None	None
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ First Trust RBA American Industrial Renaissance ETF (AIRR) [EF]	SP	\$1 - \$1,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]	SP	\$1 - \$1,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ FullerThaler Behavioral Small-Cap Growth Fund Institutional Shares (FTXSX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	Not Applicable
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]	SP	\$1 - \$1,000	Capital Gains	\$1 - \$200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ Hartford Schrodgers Emerging Markets Equity Fund (SEMNX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ iShares Core High Dividend ETF (HDV) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ iShares Global Infrastructure ETF (IGF) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ iShares Residential and Multisector Real Estate ETF (REZ) [EF]	SP	\$1 - \$1,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ iShares Russell 1000 Growth Fund (IWF) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ MFS Value Fund - Class I (MEIIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	None	None
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ The Hartford International Value Fund Class I (HILIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ VanEck Gold Miners ETF (GDX) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S ⇒ Vanguard Russell 1000 Growth ETF (VONG) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1,001 - \$2,500
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S KATHRYN LYON ⇒ BlackRock Liquidity Funds FedFund - Premier (BUPXX) [MF]	SP	\$1 - \$1,000	Capital Gains	None	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S KATHRYN LYON ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1 - \$200

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Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S KATHRYN LYON ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S KATHRYN LYON ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S KATHRYN LYON ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S KATHRYN LYON ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]	SP	\$1 - \$1,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ BlackRock Eq Dividend I (MADVX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ BlackRock Liquidity Funds FedFund - Premier (BUPXX) [MF]	SP	\$1 - \$1,000	Capital Gains	None	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ Columbia Small Cap Value Fund I Class I (CSCZX) [MF]	SP	\$1 - \$1,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ First Trust NASDAQ Clean Edge Smart Grid Infrastructure Index Fund (GRID) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]	SP	\$1,001 - \$15,000	Capital Gains	None	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ First Trust RBA American Industrial Renaissance ETF (AIRR) [EF]	SP	\$1 - \$1,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]	SP	\$1 - \$1,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ FullerThaler Behavioral Small-Cap Growth Fund Institutional Shares (FTXSX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ Hartford Schrodgers Emerging Markets Equity Fund (SEMNX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ iShares Core High Dividend ETF (HDV) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ iShares Core MSCI International Developed Markets ETF (IDEV) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ iShares Global Infrastructure ETF (IGF) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ iShares Residential and Multisector Real Estate ETF (REZ) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ iShares Russell 1000 Growth Fund (IWF) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ MFS Value Fund - Class I (MEIIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	None	None
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ The Hartford International Value Fund Class I (HILIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$2,501 - \$5,000
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ VanEck Gold Miners ETF (GDX) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Merrill Lynch ⇒ Merrill Lynch ROTH IRA ⇒ Vanguard Russell 1000 Growth ETF (VONG) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA ⇒ ClearBridge Growth Fund Class A (SHRAX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
Roth IRA ⇒ ClearBridge Value Fund - Class A (LGVAX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Roth IRA ⇒ Franklin Global Equity Fund Class A (CFIPX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
TIAA SUU ⇒ CREF Equity Index Account - R4 (QCEQFX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$201 - \$1,000	\$2,501 - \$5,000
TIAA SUU ⇒ Nuveen International Equity Index Fund R6 (TCIEIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$201 - \$1,000	\$1,001 - \$2,500
TIAA SUU ⇒ TIAA Traditional [FN]	SP	\$1 - \$1,000	Interest	\$1 - \$200	\$201 - \$1,000
TIAA SUU ⇒ Vanguard Bond Index Fund Total Bond Mkt Index Fund Institutional Share (VBTIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$1 - \$200	\$201 - \$1,000
TIAA SUU ⇒ Vanguard Real Estate Index Fund Admiral Shares (VGSLX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Interest	\$201 - \$1,000	\$201 - \$1,000

* 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 Current Year to Filing	Amount Preceding Year
Kennedy Technologies Corp	Salary	\$17,000.00	\$146,000.00
Southern Utah University	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Newrez	June, 2021	Mortgage	\$250,001 - \$500,000
	Goldenwest Credit Union	June, 2022	Honda Odyssey	\$15,001 - \$50,000
JT	Paypal	Various	Credit Card	\$10,000 - \$15,000
JT	Chase	Various	Credit	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Western Region Coordinator	Utah Democratic Party

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- o Roth IRA
DESCRIPTION: PFS INVESTMENTS CUST FOR THE ROTH IRA OF | STEVEN A MERRILL
- o TIAA SUU (Owner: SP)
- o Merrill Lynch (Owner: SP)
- o Life Insurance
LOCATION: US
- o Fidelity SUU (Owner: SP)
- o Life Insurance ⇒ National Life Universal Insurance
LOCATION: US
- o Life Insurance ⇒ North American Life Insurance
LOCATION: US
- o Merrill Lynch ⇒ Merrill Lynch CMA (Owner: SP)
LOCATION: US
- o Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S (Owner: SP)
- o Merrill Lynch ⇒ Merrill Lynch IRA MLPF&S KATHRYN LYON (Owner: SP)
- o Merrill Lynch ⇒ Merrill Lynch ROTH IRA (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Steven Merrill , 02/20/2026