



Filing ID #10074380

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Richard W. Allen
Status: Member
State/District: GA12

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/11/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual ORD Life-Former EOL [WU]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
BANK ACCOUNT(S) ⇒ South State Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	☐
CONT IRA ⇒ CASH ACCOUNTS [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
CONT IRA ⇒ DoubleLine Asset-Backed Securities ETF (DABS) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
CONT IRA ⇒ Goldman Sachs ActiveBeta International Equity ETF (GSIE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
CONT IRA ⇒ iShares iBonds Dec 2026 Term Treasury ETF (IBTG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
CONT IRA ⇒ iShares iBonds Dec 2027 Term Treasury ETF (IBTH) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
CONT IRA ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]					☐
CONT IRA ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
CONT IRA ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		☒
CONT IRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
CONT IRA ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
CONT IRA ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		☒
CONT IRA ⇒ Schwab U.S. Treasury Money Fund Investor Shares (SNSXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
CONT IRA ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
CONT IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
CONT IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
CONT IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
CONT IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
CONT IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
INIRA ⇒ CASH ACCOUNTS [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
INIRA ⇒ DoubleLine Asset-Backed Securities ETF (DABS) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
INIRA ⇒ Goldman Sachs ActiveBeta International Equity ETF (GSIE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
INIRA ⇒ iShares iBonds Dec 2026 Term Treasury ETF (IBTG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
INIRA ⇒ iShares iBonds Dec 2027 Term Treasury ETF (IBTH) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
INIRA ⇒ iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
INIRA ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
INIRA ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
INIRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
INIRA ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
INIRA ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		☒
INIRA ⇒ Schwab U.S. Treasury Money Fund Investor Shares (SNSXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
INIRA ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
INIRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
INIRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
INIRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
INIRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
INIRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
INVESTMENTS ⇒ Personal Home [RP] LOCATION: AUGUSTA, GA, US		\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	☐
INVESTMENTS ⇒ Personal Home in DC [RP] LOCATION: Washington, DC, US DESCRIPTION: Basement Level Apartment rented out		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	☐
INVESTMENTS ⇒ RAWA Leasing Equipment [OL] LOCATION: Augusta, GA, US DESCRIPTION: Construction Equipment Leasing Enterprise		\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	☐
INVESTMENTS ⇒ 1015 BROAD STREET, LLC ⇒ COMMERCIAL RENTAL PROPERTY [RP] LOCATION: Augusta, GA, US		\$500,001 - \$1,000,000	Rent	\$100,001 - \$1,000,000	☐
IRA ⇒ CASH ACCOUNTS [BA]		\$1,001 - \$15,000	Tax-Deferred		☐
IRA ⇒ DoubleLine Asset-Backed Securities ETF (DABS) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒
IRA ⇒ Goldman Sachs ActiveBeta International Equity ETF (GSIE) [EF]		\$15,001 - \$50,000	Tax-Deferred		☒
IRA ⇒ iShares iBonds Dec 2026 Term Treasury ETF (IBTG) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
IRA ⇒ iShares iBonds Dec 2027 Term Treasury ETF (IBTH) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]					☐
IRA ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]		\$15,001 - \$50,000	Tax-Deferred		☒
IRA ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]		\$100,001 - \$250,000	Tax-Deferred		☐
IRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]		\$50,001 - \$100,000	Tax-Deferred		☐
DESCRIPTION: Acquired 04/10/2024 and held at the end of 2024 in the \$50,001 to \$100,000 range. The purchase was disclosed on Schedule B of the 2024 report, but the asset was inadvertently omitted from that year's Schedule A. It is reported here for 2025.					
IRA ⇒ Nuveen Preferred Securities Fund - CI R (NPSRX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
IRA ⇒ Schwab U.S. Broad Market ETF [EF]		\$250,001 - \$500,000	Tax-Deferred		☒
IRA ⇒ Schwab U.S. Treasury Money Fund Investor Shares (SNSXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
IRA ⇒ Schwab US Dividend Equity ETF [EF]		\$100,001 - \$250,000	Tax-Deferred		☒
IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
LIVTR ⇒ Abbott Laboratories (ABT) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LIVTR ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒
LIVTR ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
LIVTR ⇒ Amazon.com, Inc. (AMZN) [ST]	SP	\$15,001 - \$50,000	None		☐
LIVTR ⇒ Amgen Inc. (AMGN) [ST]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
LIVTR ⇒ AutoZone, Inc. Common Stock (AZO) [ST]	SP	\$15,001 - \$50,000	None		☐
LIVTR ⇒ Bank of America Corporation Common Stock (BAC) [ST] DESCRIPTION: Asset Transferred In	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ CASH ACCOUNTS [BA]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
LIVTR ⇒ Church & Dwight Company, Inc. (CHD) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒
LIVTR ⇒ Cintas Corporation (CTAS) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ Costco Wholesale Corporation (COST) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ Dover Corporation (DOV) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ Global Payments Inc. Common Stock (GPN) [ST] DESCRIPTION: Asset Transferred In	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ Home Depot, Inc. (HD) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ Intuit Inc. (INTU) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LIVTR ⇒ iShares iBonds Dec 2027 Term Treasury ETF (IBTH) [EF]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☒
LIVTR ⇒ iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☒
LIVTR ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☒
LIVTR ⇒ Marriott International - Class A (MAR) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF]	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	☐
LIVTR ⇒ Paychex, Inc. (PAYX) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
LIVTR ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
LIVTR ⇒ Schwab U.S. Treasury Money Fund Investor Shares (SNSXX) [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	☐
LIVTR ⇒ Schwab US Dividend Equity ETF [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
LIVTR ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
LIVTR ⇒ US Treasury Bill - Due 12/15/26 4.375% - 91282CJP7 [GS]	SP	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LIVTR ⇒ US Treasury Bill DUE 09/15/25 (91282CFK2) [GS]	SP	None	Interest	\$1,001 - \$2,500	☐
LIVTR ⇒ Walmart Inc. (WMT) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ Champions Retreat Cottage, LLC, 20% Interest [OL] LOCATION: Evans, GA, US DESCRIPTION: LLC sold assets in year, hence value drop with corresponding income increase.	SP	None	Capital Gains	\$50,001 - \$100,000	☒
R.W. Allen & Associates, Inc. ⇒ R.W. Allen Construction Services, LLC, 15% Interest [OL] LOCATION: Augusta, GA, US DESCRIPTION: Construction Company	SP	\$100,001 - \$250,000	Business Income	\$100,001 - \$1,000,000	☒
R.W. Allen & Associates, Inc. ⇒ RW Allen Construction LLC2, 22% Interest [OL] LOCATION: AUGUSTA, GA, US DESCRIPTION: Construction Company	SP	\$1,000,001 - \$5,000,000	Business Income	\$100,001 - \$1,000,000	☐
R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC ⇒ CASH ASSETS, 44% Interest [OL] LOCATION: AUGUSTA, GA, US DESCRIPTION: Investments	SP	\$1,000,001 - \$5,000,000	Business Income	\$50,001 - \$100,000	☐
R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC ⇒ LIFE INSURANCE TRUST ⇒ Northwestern Mutual ORD Life [WU]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☐
R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC ⇒ LIFE INSURANCE TRUST ⇒ Northwestern Mutual ORD Life 2 [WU]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☐
R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC ⇒ LIFE INSURANCE TRUST ⇒ Northwestern Mutual ORD Life 3 [WU]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC ⇒ LIFE INSURANCE TRUST ⇒ Northwestern Mutual ORD Life 4 [WU]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC ⇒ LIFE INSURANCE TRUST ⇒ Northwestern Mutual Select 100 [WU]	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC ⇒ LIFE INSURANCE TRUST ⇒ Northwestern Mutual Select 100 2 [WU]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	☐
R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC ⇒ LIFE INSURANCE TRUST ⇒ Northwestern Mutual Whole Life [WU]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☐
R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC ⇒ LIFE INSURANCE TRUST ⇒ Northwestern Mutual Whole Life 2 [WU]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Abbott Laboratories (ABT) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ AbbVie Inc. (ABBV) [ST]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Amazon.com, Inc. (AMZN) [ST]	SP	\$100,001 - \$250,000	None		☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ American Water Works Company, Inc. (AWK) [ST]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Ameriprise Financial, Inc. Common Stock (AMP) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Amgen Inc. (AMGN) [ST]	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Atmos Energy Corporation Common Stock (ATO) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ AutoZone, Inc. Common Stock (AZO) [ST]	SP	\$50,001 - \$100,000	None		☒
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ CASH ACCOUNTS [BA]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Centier Bank 4.8% CD FDIC INS DUE 07/27/26	SP	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
(15140RCU1) [BA]					
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Charles Schwab Corporation (SCHW) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Chubb Limited (CB) [ST]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Cintas Corporation - Common Stock (CTAS) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Costco Wholesale Corporation (COST) [ST]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Deere & Company (DE) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Dover Corporation (DOV) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Ferguson Enterprises Inc. Common Stock (FERG) [ST]	SP	\$15,001 - \$50,000	None		☒
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Goldman Sachs ActiveBeta International Equity ETF (GSIE) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Home Depot, Inc. (HD) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Intuit Inc. (INTU) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☒
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]	SP	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☒
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Marriott International - Class A (MAR) [ST]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Morgan Stanley Bank 4.25% Due 9/13/27 (61776CAS6) [BA]	SP	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Nuveen Preferred Securities Fund - CI R (NPSRX) [MF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Procter & Gamble Company (PG) [ST]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Rollins, Inc. Common Stock (ROL) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Schwab International Dividend Equity ETF (SCHY) [EF]	SP	None	Capital Gains, Dividends	\$1,001 - \$2,500	☒
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Schwab U.S. Treasury Money Fund Investor Shares (SNSXX) [MF]	SP	\$50,001 - \$100,000	Capital Gains, Interest	\$2,501 - \$5,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Sherwin-Williams Company (SHW) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ The Charles Schwab Corporation Depositary Shares each representing 1/40th interest in a share of 5.9 (SCHW\$D) [ST]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ US Treasury 3.75% 12/31/28 (91282CJR3) [GS]	SP	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ US Treasury 4.375% 12/15/26 (91282CJP7) [GS]	SP	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Walmart Inc. (WMT) [ST]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Waste Management, Inc. (WM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
SCH1 ⇒ CASH ACCOUNTS [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	☐
SCH1 ⇒ DoubleLine Asset-Backed Securities ETF (DABS) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
SCH1 ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☒
SCH1 ⇒ Schwab U.S. Treasury Money Fund Investor Shares (SNSXX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	☐
SCH1 ⇒ US TREASUR NOTE 3.75% DUE 08/15/27 (91282CLG4) [GS]		\$50,001 - \$100,000	None		☒
SCH1 ⇒ US Treasury Bill (912797JR9) [GS]		None	Capital Gains, Interest	\$5,001 - \$15,000	☒
SCH1 ⇒ US Treasury Bill (912797KJ5) [GS]		None	Interest	\$1,001 - \$2,500	☐
SCH1 ⇒ US Treasury Bill 912797PD3 [GS]		\$50,001 - \$100,000	None		☒
SCH1 ⇒ US Treasury Bill 912797PV3 [GS]		\$50,001 - \$100,000	None		☒
SCH1 ⇒ US Treasury Bill 91282CHBo [GS]		\$100,001 - \$250,000	Capital Gains, Interest	\$2,501 - \$5,000	☒
SCH1 ⇒ US Treasury Bill 91282CKEo [GS]		\$50,001 - \$100,000	Capital Gains, Interest	\$2,501 - \$5,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SCH1 ⇒ US Treasury Bill 91282CLP4 3.5% Due 9/30/26 [GS]		\$50,001 - \$100,000	None		☒
SCH1 ⇒ US TREASURY NOTE 4.25% DUE 12/31/25 (91282CJS1) [GS]		None	Capital Gains, Interest	\$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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SCH1 ⇒ US Treasury Bill 912797JR9 [GS]		01/08/2025	S	\$15,001 - \$50,000	☒
SCH1 ⇒ US Treasury Bill 912797JR9 [GS]		01/08/2025	S (partial)	\$15,001 - \$50,000	☒
SCH1 ⇒ US Treasury Bill 91282CHBo [GS]		01/27/2025	P	\$100,001 - \$250,000	
SCH1 ⇒ US Treasury Bill 91282CKEo [GS]		01/27/2025	P	\$100,001 - \$250,000	
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ AutoZone, Inc. Common Stock (AZO) [ST]	SP	01/17/2025	P	\$15,001 - \$50,000	
LIVTR ⇒ US Treasury Bill - Due 12/15/26 4.375% - 91282CJP7 [GS]	SP	02/26/2025	P	\$50,001 - \$100,000	
R.W. Allen & Associates, Inc. ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	SP	04/11/2025	S (partial)	\$15,001 - \$50,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	SP	05/16/2025	S	\$15,001 - \$50,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]	SP	05/16/2025	P	\$15,001 - \$50,000	
CONT IRA ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]	SP	12/29/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
CONT IRA ⇒ iShares iBonds Dec 2027 Term Treasury ETF (IBTH) [EF]	SP	12/29/2025	P	\$1,001 - \$15,000	
CONT IRA ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]	SP	12/29/2025	P	\$1,001 - \$15,000	
CONT IRA ⇒ iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]	SP	12/22/2025	P	\$1,001 - \$15,000	
LIVTR ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]	SP	09/12/2025	S (partial)	\$1,001 - \$15,000	☒
LIVTR ⇒ Church & Dwight Company, Inc. Common Stock (CHD) [ST]	SP	10/10/2025	S (partial)	\$15,001 - \$50,000	☒
LIVTR ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]	SP	08/19/2025	S (partial)	\$1,001 - \$15,000	☒
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Atmos Energy Corporation Common Stock (ATO) [ST]	SP	08/19/2025	P	\$15,001 - \$50,000	
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Charles Schwab Corporation (SCHW) [ST]	SP	07/10/2025	P	\$15,001 - \$50,000	
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]	SP	12/12/2025	S	\$1,001 - \$15,000	☐
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Ferguson Enterprises Inc. Common Stock (FERG) [ST]	SP	12/12/2025	P	\$15,001 - \$50,000	
R.W. Allen & Associates, Inc. ⇒ Intuit Inc. - Common Stock (INTU) [ST]	SP	06/20/2025	P	\$1,001 - \$15,000	
SCH1 ⇒ US Treasury Bill 912797MS3 DUE 10/02/25 [GS]		05/16/2025	P	\$1,001 - \$15,000	
SCH1 ⇒ US Treasury Bill 912797PD3 [GS]		07/10/2025	P	\$50,001 - \$100,000	
SCH1 ⇒ US Treasury Bill 912797PV3 [GS]		07/10/2025	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SCH1 ⇒ US Treasury Bill 91282CHBo DUE 5/15/26 3.625% [GS]		08/19/2025	P	\$100,001 - \$250,000	
SCH1 ⇒ US TREASUR NOTE 3.75% DUE 08/15/27 (91282CLG4) [GS]		11/14/2025	P	\$50,001 - \$100,000	
SCH1 ⇒ US Treasury Bill 91282CLP4 3.5% Due 9/30/26 [GS]		10/10/2025	P	\$50,001 - \$100,000	
INIRA ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]	SP	12/19/2025	P	\$15,001 - \$50,000	
INIRA ⇒ DoubleLine Asset-Backed Securities ETF (DABS) [EF]	SP	11/05/2025	P	\$1,001 - \$15,000	
INIRA ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	11/05/2025	S (partial)	\$1,001 - \$15,000	☐
INIRA ⇒ Goldman Sachs ActiveBeta International Equity ETF (GSIE) [EF]	SP	06/24/2025	P	\$15,001 - \$50,000	
INIRA ⇒ Schwab International Dividend Equity ETF (SCHY) [EF]	SP	06/24/2025	S	\$1,001 - \$15,000	☐
INIRA ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF]	SP	02/19/2025	S (partial)	\$1,001 - \$15,000	☐
INIRA ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	02/19/2025	S (partial)	\$1,001 - \$15,000	☐
INIRA ⇒ iShares iBonds Dec 2025 Term Treasury ETF (IBTF) [EF]	SP	02/19/2025	S (partial)	\$1,001 - \$15,000	☐
INIRA ⇒ Schwab International Dividend Equity ETF (SCHY) [EF]	SP	02/19/2025	S (partial)	\$1,001 - \$15,000	☐
INIRA ⇒ iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]	SP	01/16/2025	P	\$1,001 - \$15,000	
CONT IRA ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	12/22/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
CONT IRA ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]	SP	12/22/2025	P	\$1,001 - \$15,000	
CONT IRA ⇒ Goldman Sachs ActiveBeta International Equity ETF (GSIE) [EF]	SP	12/22/2025	P	\$1,001 - \$15,000	
CONT IRA ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]	SP	12/19/2025	P	\$15,001 - \$50,000	
CONT IRA ⇒ DoubleLine Asset-Backed Securities ETF (DABS) [EF]	SP	12/02/2025	P	\$1,001 - \$15,000	
CONT IRA ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF]	SP	10/16/2025	S (partial)	\$1,001 - \$15,000	☐
CONT IRA ⇒ iShares iBonds Dec 2025 Term Treasury ETF (IBTF) [EF]	SP	10/15/2025	S (partial)	\$1,001 - \$15,000	☐
CONT IRA ⇒ Schwab International Dividend Equity ETF (SCHY) [EF]	SP	06/24/2025	S	\$15,001 - \$50,000	☐
CONT IRA ⇒ Goldman Sachs ActiveBeta International Equity ETF (GSIE) [EF]	SP	06/24/2025	P	\$15,001 - \$50,000	
IRA ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]		12/19/2025	P	\$15,001 - \$50,000	
IRA ⇒ DoubleLine Asset-Backed Securities ETF (DABS) [EF]		11/05/2025	P	\$1,001 - \$15,000	
R.W. Allen & Associates, Inc. ⇒ Champions Retreat Cottage, LLC, 20% Interest [OL] LOCATION: Evans, GA, US DESCRIPTION: LLC sold asset in year, hence value drop with corresponding income increase.	SP	10/13/2025	S	\$100,001 - \$250,000	☒
R.W. Allen & Associates, Inc. ⇒ R.W. Allen Construction Services, LLC, 15% Interest [OL] LOCATION: Augusta, GA, US DESCRIPTION: Founding member contribution	SP	01/01/2025	P	\$50,001 - \$100,000	
401k Account ⇒ Morley Principal Stable Value Fund Class Z [OT]	SP	12/10/2025	S (partial)	\$50,001 - \$100,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LOCATION: US DESCRIPTION: Retirement Account					
401k Account ⇒ Morley Principal Stable Value Fund Class Z [OT]	SP	Monthly	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: Retirement Account					
IRA ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]		11/05/2025	S (partial)	\$1,001 - \$15,000	☐
IRA ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]		09/03/2025	S (partial)	\$15,001 - \$50,000	☐
IRA ⇒ Goldman Sachs ActiveBeta International Equity ETF (GSIE) [EF]		06/24/2025	P	\$15,001 - \$50,000	
IRA ⇒ Schwab International Dividend Equity ETF (SCHY) [EF]		06/24/2025	S	\$15,001 - \$50,000	☐
IRA ⇒ iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]		03/21/2025	P	\$15,001 - \$50,000	
IRA ⇒ iShares iBonds Dec 2025 Term Treasury ETF (IBTF) [EF]		03/21/2025	P	\$15,001 - \$50,000	
LIVTR ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]	SP	10/09/2025	P	\$15,001 - \$50,000	
LIVTR ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]	SP	09/22/2025	P	\$1,001 - \$15,000	
LIVTR ⇒ iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]	SP	09/22/2025	P	\$15,001 - \$50,000	
LIVTR ⇒ iShares iBonds Dec 2027 Term Treasury ETF (IBTH) [EF]	SP	09/22/2025	P	\$1,001 - \$15,000	
LIVTR ⇒ iShares iBonds Dec 2027 Term Treasury ETF (IBTH) [EF]	SP	08/18/2025	P	\$1,001 - \$15,000	
LIVTR ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	SP	07/24/2025	S (partial)	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LIVTR ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	07/09/2025	S (partial)	\$1,001 - \$15,000	☒
LIVTR ⇒ iShares iBonds Dec 2027 Term Treasury ETF (IBTH) [EF]	SP	07/09/2025	P	\$1,001 - \$15,000	
SCH1 ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF]		12/11/2025	P	\$1,001 - \$15,000	
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Schwab International Dividend Equity ETF (SCHY) [EF]	SP	06/26/2025	S	\$15,001 - \$50,000	☒
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ Goldman Sachs ActiveBeta International Equity ETF (GSIE) [EF]	SP	06/26/2025	P	\$15,001 - \$50,000	
R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities ⇒ iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]	SP	05/28/2025	P	\$100,001 - \$250,000	
SCH1 ⇒ DoubleLine Asset-Backed Securities ETF (DABS) [EF]		11/13/2025	P	\$15,001 - \$50,000	
SCH1 ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF]		10/03/2025	P	\$1,001 - \$15,000	
SCH1 ⇒ Nuveen Preferred Securities Fund - Cl R (NPSRX) [MF]		01/24/2025	P	\$1,001 - \$15,000	
SCH1 ⇒ US Treasury Bill (91282CJS1) [GS]		04/14/2025	S	\$50,001 - \$100,000	☐
SCH1 ⇒ US Treasury Bill (91282CKEo) [GS]		04/14/2025	S (partial)	\$50,001 - \$100,000	☒
SCH1 ⇒ US Treasury Bill (91282CHBo) [GS]		04/14/2025	S	\$100,001 - \$250,000	☒

* 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
IRA DISTRIBUTION	DISTRIBUTION	\$34,239.00
IRA DISTRIBUTION	SPOUSE DISTRIBUTION	N/A
RW ALLEN CONSTRUCTION SERVICES LLC	SPOUSE SALARY	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	South State Bank Augusta, GA	12/2014	Mortgage on Secondary Residence, Washington, D.C.	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

◦ 401k Account (Owner: SP) ◦ BANK ACCOUNT(S) LOCATION: US ◦ R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC ⇒ LIFE INSURANCE TRUST (Owner: SP) ◦ INVESTMENTS LOCATION: US ◦ INVESTMENTS ⇒ 1015 BROAD STREET, LLC LOCATION: US ◦ SCH1 LOCATION: US ◦ IRA

- R.W. Allen & Associates, Inc. ⇒ RWA&A - Securities (100% Interest) (Owner: SP)
LOCATION: Augusta/ Richmond, GA, US
- INIRA (Owner: SP)
- R.W. Allen & Associates, Inc. (Owner: SP)
LOCATION: US
- LIVTR (Owner: SP)
LOCATION: US
- R.W. Allen & Associates, Inc. ⇒ R.W. ALLEN, LLC (44% Interest) (Owner: SP)
LOCATION: US
- CONT IRA (Owner: SP)

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. Richard W. Allen , 08/11/2026