



Filing ID #10074384

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Greg Landsman
Status: Member
State/District: OH01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 04/20/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America - HSA [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fifth Third Bank Account [BA]	SP	\$50,001 - \$100,000	None		☐
DESCRIPTION: Checking & Savings account					
Fifth Third bank accounts [BA]		\$1,001 - \$15,000	None		☐
Ohio Public Employees Retirement System [DB]		\$50,001 - \$100,000	Tax-Deferred		☐
BLK CollegeAdvantage 529 Plan - DC #1 ⇒ BR COLLEGE 2027 OPTION - A [5F]		\$50,001 - \$100,000	Tax-Deferred		☒
LOCATION: OH DESCRIPTION: Asset transferred from filer's relative in 2025.					
BLK CollegeAdvantage 529 Plan - DC #2 ⇒ BR COLLEGE 2032 OPTION - A [5F]		\$100,001 - \$250,000	Tax-Deferred		☐
LOCATION: OH DESCRIPTION: Asset transferred from filer's relative in 2025.					
Fidelity - 529 Plan ⇒ MA College Portfolio [5F]	DC	\$15,001 - \$50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: MA					
Fidelity Brokerage ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	SP	\$1 - \$1,000	Dividends	\$201 - \$1,000	☐
Fidelity Brokerage ⇒ Kroger Company (KR) [ST]	SP	None	Dividends	\$1,001 - \$2,500	☐
DESCRIPTION: Stock transferred to Rockefeller Capital Management (1)					
Fidelity Brokerage ⇒ Kroger Company (KR) - Restricted Stock [OT]	SP	None	None		☐
DESCRIPTION: Employee Benefit COMMENTS: Shares were forfeited when spouse terminated her employment with 84.51 (owned by Kroger) in 2025.					
Greg Landman Roth IRA ⇒ Cash [IH]		None	Tax-Deferred		☐
Greg Landman Roth IRA ⇒ First Trust Dorsey Wright Focus 5 ETF (FV) [EF]		None	Tax-Deferred		☒
Kroger - 401(k) ⇒ Retirement Date Fund 2040 [OT]	SP	None	Tax-Deferred		☒
DESCRIPTION: Mutual Fund					
Rockefeller Capital Management (1) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	JT	None	None		☒
DESCRIPTION: Sold for a loss					
Rockefeller Capital Management (1) ⇒ Ameriprise Financial, Inc. Common Stock (AMP) [ST]	JT	None	None		☒
DESCRIPTION: Sold for a loss					
Rockefeller Capital Management (1) ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]	JT	None	Capital Gains	\$2,501 - \$5,000	☒
Rockefeller Capital Management (1) ⇒ Artisan Emerging Markets Debt Opportunities Fund - Institutional Shares (APHOX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
DESCRIPTION: Capital gains distribution					
Rockefeller Capital Management (1) ⇒	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Axonic Strategic Income Fund Class I (AXSIX) [MF]					
Rockefeller Capital Management (1) ⇒ Baird Aggregate Bond Fund Institutional Class (BAGIX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ Bank Deposit Sweep [BA]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
Rockefeller Capital Management (1) ⇒ BlackRock, Inc. Common Stock (BLK) [ST] DESCRIPTION: Sold for a loss	JT	None	None		☒
Rockefeller Capital Management (1) ⇒ Bramshill Income Performance Fund - Institutional Class (BRMSX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	JT	None	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Rockefeller Capital Management (1) ⇒ CrowdStrike Holdings, Inc. - Class A Common Stock (CRWD) [ST] DESCRIPTION: Sold for a loss	JT	None	None		☒
Rockefeller Capital Management (1) ⇒ Eaton Vance Government Obligations Fund Class I (EIGOX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ Edgewood Growth Fund Insti (EGFIX) [MF]	JT	None	Capital Gains	\$1,001 - \$2,500	☒
Rockefeller Capital Management (1) ⇒ Equable Shares Hedged Equity ETF (HEDG) [EF] DESCRIPTION: Capital gains distribution	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ FEDERATED HERMES GOVT OBLIGATIONS IS (GOIXX) [BA] DESCRIPTION: Money Market Fund	JT	\$1,001 - \$15,000	None		☐
Rockefeller Capital Management (1) ⇒ First Trust Dorsey Wright Focus 5 ETF (FV) [EF]		None	Capital Gains	\$5,001 - \$15,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rockefeller Capital Management (1) ⇒ GQG PARTNERS EMERGING MARKETS EQUITY FUND Institutional Shares (GQGIX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ Guggenheim Total Return Bond Fund- Institutional Class (GIBIX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ Harbor Small Cap Value Fund Insti Cl (HASCX) [MF] DESCRIPTION: Capital gains distribution	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Rockefeller Capital Management (1) ⇒ iShares Core MSCI Pacific ETF (IPAC) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ iShares Core S&P 500 ETF (IVV) [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☒
Rockefeller Capital Management (1) ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	JT	\$15,001 - \$50,000	None		☒
Rockefeller Capital Management (1) ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Rockefeller Capital Management (1) ⇒ iShares MSCI Emerging Index Fund (EEM) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ iShares Silver Trust (SLV) [EF]	JT	None	Capital Gains	\$2,501 - \$5,000	☒
Rockefeller Capital Management (1) ⇒ KraneShares CSI China Internet ETF (KWEB) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ Kroger Company (KR) [ST] DESCRIPTION: Stock was transferred from Fidelity Brokerage.	JT	None	Capital Gains	\$100,001 - \$1,000,000	☒
Rockefeller Capital Management (1) ⇒ Lyrical U.S. Value Equity Fund Institutional Class (LYRIX)	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
[MF]					
DESCRIPTION: Capital gains distribution					
Rockefeller Capital Management (1) ⇒ Nationwide Geneva Small Cap Growth Fund Institutional Service Class (NWKDX) [MF]	JT	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	☒
DESCRIPTION: Capital gains distribution					
Rockefeller Capital Management (1) ⇒ NVIDIA Corporation (NVDA) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Rockefeller Capital Management (1) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]	JT	None	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Rockefeller Capital Management (1) ⇒ Payden High Income Fund SI Class (PYCHX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Rockefeller Capital Management (1) ⇒ Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]	JT	\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	☒
DESCRIPTION: Capital gains distribution					
Rockefeller Capital Management (1) ⇒ Pzena Emerging Markets Value Fund - Institutional Class (PZIEX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
DESCRIPTION: Capital gains distribution					
Rockefeller Capital Management (1) ⇒ SPDR Gold MiniShares Trust (GLDM) [EF]	JT	\$15,001 - \$50,000	None		☒
Rockefeller Capital Management (1) ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	JT	\$15,001 - \$50,000	None		☒
Rockefeller Capital Management (1) ⇒ Victory Pioneer Cat Bond Fund Class Y (CBYYX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☒
Rockefeller Capital Management (1) ⇒ WCM Focused International Growth Fund Insti Cl (WCMIX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
DESCRIPTION: Capital gains distribution					
Rockefeller Capital Management (2) ⇒ Apple Inc. (AAPL) [ST]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rockefeller Capital Management (2) ⇒ Bank Deposit Sweep [BA]	JT	\$1,001 - \$15,000	None		☐
Rockefeller Capital Management (2) ⇒ Bristol-Myers Squibb Company (BMY) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Rockefeller Capital Management (2) ⇒ Costco Wholesale Corporation (COST) [ST]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	☒
Rockefeller Capital Management (2) ⇒ Fifth Third Bancorp (FITB) [ST]	JT	None	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Rockefeller Capital Management (2) ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	☒
Rockefeller Capital Management (2) ⇒ Microsoft Corporation (MSFT) [ST]	JT	None	Capital Gains, Dividends	\$50,001 - \$100,000	☒
Rockefeller Capital Management (2) ⇒ Philip Morris International Inc (PM) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Rockefeller Capital Management (2) ⇒ Procter & Gamble Company (PG) [ST]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	☒
Rockefeller Capital Management (2) ⇒ Simon Property Group, Inc. (SPG) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Sarah Landsman Traditional IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Ameriprise Financial, Inc. Common Stock (AMP) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Apple Inc. (AAPL) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Sarah Landsman Traditional IRA ⇒ Bank Deposit Sweep [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Sarah Landsman Traditional IRA ⇒ BlackRock, Inc. Common Stock (BLK) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Cadence Design Systems, Inc. - Common Stock (CDNS) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Cencora, Inc. Common Stock (COR) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Danaher Corporation (DHR) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Dollar General Corporation (DG) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Edgewood Growth Fund Insti (EGFIX) [MF]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Equable Shares Hedged Equity ETF (HEDG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Equinix, Inc. (EQIX) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ FEDERATED HERMES TREASURY OBLIG IS [BA] DESCRIPTION: Money Market Fund	SP	None	Tax-Deferred		☐
Sarah Landsman Traditional IRA ⇒ GQG PARTNERS EMERGING MARKETS EQUITY FUND Institutional Shares (GQGIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Harbor Small Cap Value Fund Insti Cl (HASCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒	SP	None	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Home Depot, Inc. (HD) [ST]					
Sarah Landsman Traditional IRA ⇒ Honeywell International Inc. (HON) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ iShares Core MSCI Pacific ETF (IPAC) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$250,001 - \$500,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ iShares MSCI Emerging Index Fund (EEM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ KraneShares CSI China Internet ETF (KWEB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ L3Harris Technologies, Inc. Common Stock (LHX) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Lyrical U.S. Value Equity Fund Institutional Class (LYRIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Microsoft Corporation (MSFT) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Nationwide Geneva Small Cap Growth Fund Institutional Service Class (NWKDX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒	SP	None	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
NVIDIA Corporation - Common Stock (NVDA) [ST]					
Sarah Landsman Traditional IRA ⇒ O'Reilly Automotive, Inc. (ORLY) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Parker-Hannifin Corporation (PH) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Pzena Emerging Markets Value Fund - Institutional Class (PZIEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Salesforce, Inc. Common Stock (CRM) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ TE Connectivity Ltd. New Switzerland Registered Shares (TEL) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Thermo Fisher Scientific Inc (TMO) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Uber Technologies, Inc. (UBER) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ United Rentals, Inc. Common Stock (URI) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Visa Inc. (V) [ST]	SP	None	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Walt Disney Company (DIS) [ST]	SP	None	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Sarah Landsman Traditional IRA ⇒ WCM Focused International Growth Fund Insti Cl (WCMIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Sarah Landsman Traditional IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]	SP	None	Tax-Deferred		☒

* 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?
Rockefeller Capital Management (1) ⇒ CrowdStrike Holdings, Inc. - Class A Common Stock (CRWD) [ST]	JT	02/18/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	JT	02/20/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ Ameriprise Financial, Inc. Common Stock (AMP) [ST]	JT	02/26/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ CrowdStrike Holdings, Inc. - Class A Common Stock (CRWD) [ST]	JT	02/26/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ BlackRock, Inc. Common Stock (BLK) [ST]	JT	02/18/2025	S	\$1,001 - \$15,000	☐
Rockefeller Capital Management (1) ⇒ Arista Investors Corp. Class A (ARINA) [ST]	JT	02/20/2025	S	\$15,001 - \$50,000	☒
COMMENTS: Inadvertently reported symbol ARINA on PTR. Consistent with Sch A, correct symbol is ANET (Arista Networks Inc.).					
Rockefeller Capital Management (1) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	JT	02/26/2025	S (partial)	\$1,001 - \$15,000	☐
Rockefeller Capital Management (1) ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	JT	02/26/2025	S (partial)	\$1,001 - \$15,000	☒
Rockefeller Capital Management (1) ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	JT	02/26/2025	S (partial)	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Rockefeller Capital Management (1) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]	JT	02/26/2025	S (partial)	\$1,001 - \$15,000	☒
Rockefeller Capital Management (2) ⇒ Apple Inc. - Common Stock (AAPL) [ST]	JT	03/27/2025	S	\$15,001 - \$50,000	☒
Rockefeller Capital Management (2) ⇒ Bristol-Myers Squibb Company Common Stock (BMY) [ST]	JT	03/27/2025	S	\$1,001 - \$15,000	☒
Rockefeller Capital Management (2) ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	JT	03/27/2025	S	\$15,001 - \$50,000	☒
Rockefeller Capital Management (2) ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]	JT	03/27/2025	S	\$1,001 - \$15,000	☒
Rockefeller Capital Management (2) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	JT	03/27/2025	S	\$15,001 - \$50,000	☒
Rockefeller Capital Management (2) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	JT	03/27/2025	S	\$50,001 - \$100,000	☒
Rockefeller Capital Management (2) ⇒ Philip Morris International Inc Common Stock (PM) [ST]	JT	03/27/2025	S	\$15,001 - \$50,000	☒
Rockefeller Capital Management (2) ⇒ Procter & Gamble Company (PG) [ST]	JT	03/27/2025	S	\$15,001 - \$50,000	☒
Rockefeller Capital Management (2) ⇒ Simon Property Group, Inc. Common Stock (SPG) [ST]	JT	03/27/2025	S	\$15,001 - \$50,000	☒
Sarah Landsman Traditional IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ TE Connectivity plc Ordinary Shares (TEL) [ST]	SP	03/25/2025	S	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	03/27/2025	S	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ Cencora, Inc. Common Stock (COR) [ST]	SP	03/27/2025	S	\$15,001 - \$50,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Sarah Landsman Traditional IRA ⇒ Ameriprise Financial, Inc. Common Stock (AMP) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	03/27/2025	S	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ BlackRock, Inc. Common Stock (BLK) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Cadence Design Systems, Inc. - Common Stock (CDNS) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Danaher Corporation Common Stock (DHR) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Walt Disney Company (DIS) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Dollar General Corporation Common Stock (DG) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Equinix, Inc. - Common Stock (EQIX) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Home Depot, Inc. (HD) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Honeywell International Inc. (HON) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ L3Harris Technologies, Inc. Common Stock (LHX) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	03/27/2025	S	\$50,001 - \$100,000	☐
Sarah Landsman Traditional IRA ⇒	SP	03/27/2025	S	\$15,001 - \$50,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
NVIDIA Corporation - Common Stock (NVDA) [ST]					
Greg Landman Roth IRA ⇒ First Trust Dorsey Wright Focus 5 ETF (FV) [EF]		03/26/2025	S	\$50,001 - \$100,000	☐
Sarah Landsman Traditional IRA ⇒ O'Reilly Automotive, Inc. - Common Stock (ORLY) [ST]	SP	03/27/2025	S	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]	SP	03/27/2025	S	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ Salesforce, Inc. Common Stock (CRM) [ST]	SP	03/27/2025	S	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Uber Technologies, Inc. Common Stock (UBER) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ United Rentals, Inc. Common Stock (URI) [ST]	SP	03/27/2025	S	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	SP	03/27/2025	S	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ Visa Inc. (V) [ST]	SP	03/27/2025	S	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ Zoetis Inc. Class A Common Stock (ZTS) [ST]	SP	03/27/2025	S	\$1,001 - \$15,000	☐
Fidelity Brokerage ⇒ Kroger Company (KR) [ST]	SP	05/09/2025	S	\$250,001 - \$500,000	☒
DESCRIPTION: Sale occurred after asset was transferred to Rockefeller Capital Management (1).					
Rockefeller Capital Management (1) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	JT	03/27/2025	S	\$1,001 - \$15,000	☐
Rockefeller Capital Management (1) ⇒ Ameriprise Financial, Inc. Common Stock (AMP) [ST]	JT	03/27/2025	S	\$1,001 - \$15,000	☐
Rockefeller Capital Management (1) ⇒	JT	03/27/2025	S	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Costco Wholesale Corporation - Common Stock (COST) [ST]					
Rockefeller Capital Management (1) ⇒ CrowdStrike Holdings, Inc. - Class A Common Stock (CRWD) [ST]	JT	03/27/2025	S	\$1,001 - \$15,000	☐
Rockefeller Capital Management (1) ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	JT	03/27/2025	S	\$1,001 - \$15,000	☒
Rockefeller Capital Management (1) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]	JT	03/27/2025	S	\$1,001 - \$15,000	☒
Rockefeller Capital Management (1) ⇒ First Trust Dorsey Wright Focus 5 ETF (FV) [EF]	JT	03/26/2025	S	\$1,001 - \$15,000	☒
Rockefeller Capital Management (1) ⇒ Artisan Emerging Markets Debt Opportunities Fund - Institutional Shares (APHOX) [MF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Artisan Emerging Markets Debt Opportunities Fund - Institutional Shares (APHOX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]	JT	05/09/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Edgewood Growth Fund Insti (EGFIX) [MF]	JT	05/09/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ Edgewood Growth Fund Insti (EGFIX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Edgewood Growth Fund Insti (EGFIX) [MF]	JT	11/11/2025	S	\$15,001 - \$50,000	☒
Rockefeller Capital Management (1) ⇒ GQG PARTNERS EMERGING MARKETS EQUITY FUND Institutional Shares (GQGIX) [MF]	JT	05/09/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ GQG PARTNERS EMERGING MARKETS EQUITY FUND	JT	04/28/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Institutional Shares (GQGIX) [MF]					
Rockefeller Capital Management (1) ⇒ Harbor Small Cap Value Fund Insti Cl (HASCX) [MF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Harbor Small Cap Value Fund Insti Cl (HASCX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Harbor Small Cap Value Fund Insti Cl (HASCX) [MF]	JT	07/15/2025	S (partial)	\$1,001 - \$15,000	☒
Rockefeller Capital Management (1) ⇒ Lyrical U.S. Value Equity Fund Institutional Class (LYRIX) [MF]	JT	05/09/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ Lyrical U.S. Value Equity Fund Institutional Class (LYRIX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Lyrical U.S. Value Equity Fund Institutional Class (LYRIX) [MF]	JT	11/11/2025	S (partial)	\$15,001 - \$50,000	☒
Rockefeller Capital Management (1) ⇒ Nationwide Geneva Small Cap Growth Fund Institutional Service Class (NWKDX) [MF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Nationwide Geneva Small Cap Growth Fund Institutional Service Class (NWKDX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]	JT	05/09/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Pzena Emerging Markets Value Fund - Institutional Class (PZIEX) [MF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Pzena Emerging Markets Value Fund - Institutional Class (PZIEX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Rockefeller Capital Management (1) ⇒ WCM Focused International Growth Fund Insti Cl (WCMIX) [MF]	JT	05/09/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ WCM Focused International Growth Fund Insti Cl (WCMIX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Axonic Strategic Income Fund Class I (AXSIX) [MF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Axonic Strategic Income Fund Class I (AXSIX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Baird Aggregate Bond Fund Institutional Class (BAGIX) [MF]	JT	05/09/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ Baird Aggregate Bond Fund Institutional Class (BAGIX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Baird Aggregate Bond Fund Institutional Class (BAGIX) [MF]	JT	09/05/2025	S (partial)	\$1,001 - \$15,000	☐
Rockefeller Capital Management (1) ⇒ Bramshill Income Performance Fund - Institutional Class (BRMSX) [MF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Bramshill Income Performance Fund - Institutional Class (BRMSX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Eaton Vance Government Obligations Fund Class I (EIGOX) [MF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Eaton Vance Government Obligations Fund Class I (EIGOX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Eaton Vance Government Obligations Fund Class I (EIGOX) [MF]	JT	09/05/2025	S (partial)	\$1,001 - \$15,000	☐
Rockefeller Capital Management (1) ⇒ Guggenheim Total Return Bond Fund- Institutional Class	JT	05/09/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
(GIBIX) [MF]					
Rockefeller Capital Management (1) ⇒ Guggenheim Total Return Bond Fund- Institutional Class (GIBIX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Payden High Income Fund SI Class (PYCHX) [MF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Payden High Income Fund SI Class (PYCHX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Victory Pioneer Cat Bond Fund Class Y (CBYYX) [MF]	JT	06/02/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Victory Pioneer Cat Bond Fund Class Y (CBYYX) [MF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Victory Pioneer Cat Bond Fund Class Y (CBYYX) [MF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]	JT	05/09/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ iShares Core MSCI Pacific ETF (IPAC) [EF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ iShares Core MSCI Pacific ETF (IPAC) [EF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	JT	05/09/2025	P	\$50,001 - \$100,000	
Rockefeller Capital Management (1) ⇒	JT	04/28/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]					
Rockefeller Capital Management (1) ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	JT	11/11/2025	S (partial)	\$15,001 - \$50,000	☒
Rockefeller Capital Management (1) ⇒ iShares Core S&P 500 ETF (IVV) [EF]	JT	11/11/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ iShares Core S&P 500 ETF (IVV) [EF]	JT	05/09/2025	P	\$100,001 - \$250,000	
Rockefeller Capital Management (1) ⇒ iShares Core S&P 500 ETF (IVV) [EF]	JT	04/28/2025	P	\$50,001 - \$100,000	
Rockefeller Capital Management (1) ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	JT	05/09/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	JT	07/15/2025	S (partial)	\$1,001 - \$15,000	☒
Rockefeller Capital Management (1) ⇒ iShares MSCI Emerging Index Fund (EEM) [EF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ iShares MSCI Emerging Index Fund (EEM) [EF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ KraneShares CSI China Internet ETF (KWEB) [EF]	JT	07/15/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]	SP	04/28/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ Edgewood Growth Fund Insti (EGFIX) [MF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ Edgewood Growth Fund Insti (EGFIX) [MF]	SP	04/28/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Sarah Landsman Traditional IRA ⇒ Edgewood Growth Fund Insti (EGFIX) [MF]	SP	11/11/2025	S	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ GQG PARTNERS EMERGING MARKETS EQUITY FUND Institutional Shares (GQGIX) [MF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ GQG PARTNERS EMERGING MARKETS EQUITY FUND Institutional Shares (GQGIX) [MF]	SP	04/28/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ Harbor Small Cap Value Fund Insti Cl (HASCX) [MF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ Harbor Small Cap Value Fund Insti Cl (HASCX) [MF]	SP	04/28/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ Harbor Small Cap Value Fund Insti Cl (HASCX) [MF]	SP	07/15/2025	S (partial)	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ Lyrical U.S. Value Equity Fund Institutional Class (LYRIX) [MF]	SP	05/02/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ Lyrical U.S. Value Equity Fund Institutional Class (LYRIX) [MF]	SP	04/28/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ Lyrical U.S. Value Equity Fund Institutional Class (LYRIX) [MF]	SP	11/11/2025	S (partial)	\$15,001 - \$50,000	☐
Sarah Landsman Traditional IRA ⇒ Nationwide Geneva Small Cap Growth Fund Institutional Service Class (NWKDX) [MF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ Nationwide Geneva Small Cap Growth Fund Institutional Service Class (NWKDX) [MF]	SP	04/28/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]	SP	05/02/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒	SP	04/28/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]					
Sarah Landsman Traditional IRA ⇒ Pzena Emerging Markets Value Fund - Institutional Class (PZIEX) [MF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ Pzena Emerging Markets Value Fund - Institutional Class (PZIEX) [MF]	SP	04/28/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ WCM Focused International Growth Fund Insti Cl (WCMIX) [MF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ WCM Focused International Growth Fund Insti Cl (WCMIX) [MF]	SP	04/28/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]	SP	05/02/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]	SP	04/28/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ iShares Core MSCI Pacific ETF (IPAC) [EF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ iShares Core MSCI Pacific ETF (IPAC) [EF]	SP	04/28/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	SP	04/28/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	SP	05/02/2025	P	\$50,001 - \$100,000	
Sarah Landsman Traditional IRA ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	SP	04/28/2025	P	\$100,001 - \$250,000	
Sarah Landsman Traditional IRA ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	SP	11/11/2025	S (partial)	\$15,001 - \$50,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Sarah Landsman Traditional IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	11/11/2025	P	\$50,001 - \$100,000	
Sarah Landsman Traditional IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	05/02/2025	P	\$50,001 - \$100,000	
Sarah Landsman Traditional IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	04/28/2025	P	\$100,001 - \$250,000	
Sarah Landsman Traditional IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	04/28/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	07/15/2025	S (partial)	\$1,001 - \$15,000	☐
Sarah Landsman Traditional IRA ⇒ iShares MSCI Emerging Index Fund (EEM) [EF]	SP	04/28/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ KraneShares CSI China Internet ETF (KWEB) [EF]	SP	07/15/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ Equable Shares Hedged Equity ETF (HEDG) [EF]	SP	11/11/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	11/11/2025	P	\$15,001 - \$50,000	
Sarah Landsman Traditional IRA ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	05/02/2025	P	\$1,001 - \$15,000	
Sarah Landsman Traditional IRA ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ Equable Shares Hedged Equity ETF (HEDG) [EF]	JT	11/11/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	JT	11/11/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Rockefeller Capital Management (1) ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ SPDR Gold MiniShares Trust (GLDM) [EF]	JT	12/16/2025	P	\$15,001 - \$50,000	
Rockefeller Capital Management (1) ⇒ SPDR Gold MiniShares Trust (GLDM) [EF]	JT	10/15/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ SPDR Gold MiniShares Trust (GLDM) [EF]	JT	05/09/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ SPDR Gold MiniShares Trust (GLDM) [EF]	JT	04/28/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ SPDR Gold MiniShares Trust (GLDM) [EF]	JT	12/17/2025	S (partial)	\$1,001 - \$15,000	☐
Rockefeller Capital Management (1) ⇒ SPDR Gold MiniShares Trust (GLDM) [EF]	JT	06/02/2025	S (partial)	\$1,001 - \$15,000	☐
Rockefeller Capital Management (1) ⇒ iShares Silver Trust (SLV) [EF]	JT	09/05/2025	P	\$1,001 - \$15,000	
Rockefeller Capital Management (1) ⇒ iShares Silver Trust (SLV) [EF]	JT	12/16/2025	S	\$1,001 - \$15,000	☒
Rockefeller Capital Management (1) ⇒ iShares Silver Trust (SLV) [EF]	JT	10/15/2025	S (partial)	\$1,001 - \$15,000	☒
Kroger - 401(k) ⇒ Retirement Date Fund 2040 [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	04/28/2025	S	\$250,001 - \$500,000	☐
Kroger - 401(k) ⇒ Retirement Date Fund 2040 [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	03/28/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Kroger - 401(k) ⇒ Retirement Date Fund 2040 [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	03/21/2025	P	\$1,001 - \$15,000	
Kroger - 401(k) ⇒ Retirement Date Fund 2040 [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	03/14/2025	P	\$1,001 - \$15,000	
Kroger - 401(k) ⇒ Retirement Date Fund 2040 [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	02/28/2025	P	\$1,001 - \$15,000	
Kroger - 401(k) ⇒ Retirement Date Fund 2040 [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	02/14/2025	P	\$1,001 - \$15,000	
Kroger - 401(k) ⇒ Retirement Date Fund 2040 [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	01/31/2025	P	\$1,001 - \$15,000	
Kroger - 401(k) ⇒ Retirement Date Fund 2040 [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	01/17/2025	P	\$1,001 - \$15,000	
Kroger - 401(k) ⇒ Retirement Date Fund 2040 [OT] LOCATION: US DESCRIPTION: Mutual Fund	SP	01/03/2025	P	\$1,001 - \$15,000	
BLK CollegeAdvantage 529 Plan - DC #1 ⇒ BR COLLEGE 2027 OPTION - A [5F] LOCATION: OH		12/09/2025	S (partial)	\$1,001 - \$15,000	☐

* 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
84.51 (Owned by Kroger)	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Fifth Third Bank COMMENTS: Paid in full August 2025	March 2013	Home Mortgage	\$15,001 - \$50,000
	Fidelity COMMENTS: Paid in full 2025	December 2021	Margin account	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member & Manager	Landsman & Associates, LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2014	Filer and Ohio Public Employees Retirement System	Defined benefit plan that provides service retirement benefits.

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)	08/06/2025	08/14/2025	Cincinnati, OH - Tel Aviv, Israel - Cincinnati, OH	0	☒	☒	☐

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Rockefeller Capital Management (1) (100% Interest)
- Greg Landman Roth IRA
- Sarah Landsman Traditional IRA (Owner: SP)
- Rockefeller Capital Management (2) (Owner: JT)
- Fidelity - 529 Plan (Owner: DC)
LOCATION: MA
- Fidelity Brokerage (Owner: SP)
- Rockefeller Capital Management (1) (Owner: JT)
- Kroger - 401(k) (Owner: SP)
- BLK CollegeAdvantage 529 Plan - DC #1
LOCATION: OH
- BLK CollegeAdvantage 529 Plan - DC #2
LOCATION: OH

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. Greg Landsman , 04/20/2026