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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. April McClain Delaney
Status: Member
State/District: MD06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 09/08/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Acacia Partners, LP [HE] DESCRIPTION: Fund manager letter on file with the Committee on Ethics.	JT	\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Alliance Partners Holdings, LLC [OL] LOCATION: Chevy Chase, MD, US DESCRIPTION: Banking	SP	\$100,001 - \$250,000	Ordinary Income	\$50,001 - \$100,000	☐
American Steadfast, LP (hedge fund) [HE] DESCRIPTION: Fund manager letter on file with the Committee on Ethics.	JT	\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Enlightenment Capital Solutions Fund II, LP [HE] DESCRIPTION: private equity in buyout growth		\$500,001 - \$1,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Farallon Capital Partners, LP (hedge fund) [HE]	JT	\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
FFL Executive Partners IV, LP [OT] DESCRIPTION: Private Equity. Fund manager letter on file with the Committee on Ethics.	SP	\$250,001 - \$500,000	Partnership Income	\$50,001 - \$100,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Forbright, Inc. [PS] DESCRIPTION: Bank stock	JT	\$25,000,001 - \$50,000,000	None		☐
Forbright, Inc., call option [OP] DESCRIPTION: Options	SP	\$5,000,001 - \$25,000,000	None		☐
Healthpoint Capital Partners II, LP [HE] DESCRIPTION: private equity in healthcare	JT	\$15,001 - \$50,000	None		☐
JPM US Treasury [GS]	JT	\$5,000,001 - \$25,000,000	Interest	\$100,001 - \$1,000,000	☐
Mass Mutual - Whole Life [WU]	SP	\$100,001 - \$250,000	None		☐
Notes receivables - Key Bridge Partners LLC, Bethesda, MD [DO]	JT	None	Interest	\$15,001 - \$50,000	☐
Pacific West - Checking [BA]	SP	\$50,001 - \$100,000	None		☐
Rental Property [RP] LOCATION: Montgomery County, MD, US	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	☐
Wells Fargo - Checking [BA]	JT	\$500,001 - \$1,000,000	Interest	\$201 - \$1,000	☐
2015 Insurance Trust ⇒ Mass Mutual, whole life [WU]		\$500,001 - \$1,000,000	None		☐
2015 Insurance Trust ⇒ Wells Fargo - Checking [BA]		\$1,001 - \$15,000	None		☐
Allstate, variable annuity ⇒ Fixed 1 Year 11/5/22 at 3% [FN]	JT	\$500,001 - \$1,000,000	None		☐
Allstate, variable annuity ⇒ Invesco VI S&P 500 Index Port - Series I [MF]	JT	\$250,001 - \$500,000	None		☐
Allstate, variable annuity ⇒ Morgan Stanley - VIS Multicap Growth Port - Class X [MF]	JT	\$250,001 - \$500,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AMD 09 LLC ⇒ Federated Treasury Obligations Fund - (TOIXX) [GS]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	☐
AMD 09 LLC ⇒ Forbright, Inc. [PS] DESCRIPTION: Bank stock		\$1,000,001 - \$5,000,000	None		☐
AMD 09 LLC ⇒ Wells Fargo, N.A. [BA]		\$250,001 - \$500,000	Interest	\$2,501 - \$5,000	☐
Cloister Cottage Venture, LLC ⇒ Investment in Residential Property [RP] LOCATION: Sea Island, GA, US	SP	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	☐
Cloister Cottage Venture, LLC ⇒ Investment in Residential Property [RP] LOCATION: Sea Island, GA, US		\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	☐
Cloister Cottage Venture, LLC ⇒ Wells Fargo - Checking [BA]		\$15,001 - \$50,000	None		☐
Cloister Cottage Venture, LLC ⇒ Wells Fargo - Checking [BA]	SP	\$15,001 - \$50,000	None		☐
DC Insurance Trust ⇒ Wells Fargo - Checking [BA]	DC	\$1,001 - \$15,000	None		☐
DC Insurance Trust ⇒ Pacific Life ⇒ BlackRock Global Allocation VI Fund III (GAIII) [OT] DESCRIPTION: Mutual Fund	DC	\$50,001 - \$100,000	None		☐
DC Insurance Trust ⇒ Pacific Life ⇒ Fidelity VIP Contrafund 2 (IFVCX) [MF]	DC	\$250,001 - \$500,000	None		☐
DC Insurance Trust ⇒ Pacific Life ⇒ Fidelity VIP Mid Cap Class 2 [MF]	DC	\$100,001 - \$250,000	None		☐
DC Insurance Trust ⇒ Pacific Life ⇒ MFS International Large Cap [MF]	DC	\$100,001 - \$250,000	None		☐
DC Insurance Trust ⇒ Pacific Life ⇒ Morgan Stanley PSF Real Estate Portfolio [MF]	DC	\$50,001 - \$100,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DC Insurance Trust ⇒ Pacific Life ⇒ PIMCO VIT Global Multi-Asset Managed - Allocation Advisor Class [MF]	DC	\$50,001 - \$100,000	None		☐
DC Insurance Trust ⇒ Pacific Life ⇒ Van Eck VIP Global Hard Assets [MF]	DC	\$15,001 - \$50,000	None		☐
East Capitol Venture, LLC ⇒ Allspring C&B Large Cap Value Fund-R6 (CBEJX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	☐
East Capitol Venture, LLC ⇒ Eaton Vance Global Macro Absolute Return Advantage - Class R6 (EGRSX) [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
East Capitol Venture, LLC ⇒ Federated Treasury Cash Reserves #125 [BA] DESCRIPTION: money market fund		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
East Capitol Venture, LLC ⇒ Invesco Developing Markets Fund Class R6 (ODVIX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	☐
East Capitol Venture, LLC ⇒ Investment in Residential Property [RP] LOCATION: Washington, DC, US		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	☐
East Capitol Venture, LLC ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
East Capitol Venture, LLC ⇒ Lazard Global Listed Infrastructure Ptf Insti Shs (GLIFX) [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
East Capitol Venture, LLC ⇒ MFS Value Fund Class R6 (MEIKX) [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
East Capitol Venture, LLC ⇒ Pimco CommodityRealReturn Strategy Fund Institutional Class (PCRIX) [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
East Capitol Venture, LLC ⇒ Principal Funds, Inc. - MidCap Fund, Class R6 (PMAQX) [MF]		\$100,001 - \$250,000	None		☐
East Capitol Venture, LLC ⇒ T. Rowe Price Institutional Floating Rate Fund (RPIFX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
East Capitol Venture, LLC ⇒ Touchstone Sands Capital Emerging Markets Growth Fund Class R6 (TSRMX) [MF]		\$100,001 - \$250,000	None		☐
East Capitol Venture, LLC ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	☐
East Capitol Venture, LLC ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	☐
East Capitol Venture, LLC ⇒ Virtus AlphaSimplex Global Alternatives Fund Class R6 (GAFNX) [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
East Capitol Venture, LLC ⇒ Wells Fargo - Checking [BA]		\$15,001 - \$50,000	None		☐
EVR Investment, LLC ⇒ Eloy Investors LLC [RP] LOCATION: Scottsdale, AZ, US DESCRIPTION: raw land for future development	SP	\$50,001 - \$100,000	None		☐
J.P. Morgan - Brokerage ⇒ JPM 100% US Treasury Fund [GS]	SP	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	☐
J.P. Morgan - Brokerage ⇒ PacWest Bancorp (PACW) [ST]	SP	\$100,001 - \$250,000	Dividends	\$15,001 - \$50,000	☐
J.P. Morgan - Brokerage ⇒ US DOLLAR JPM DEPOSIT SWEEP [BA]	SP	\$100,001 - \$250,000	Interest	\$201 - \$1,000	☐
JKD 09 LLC ⇒ Federated Treasury Obligations Fund - (TOIXX) [GS]	SP	Spouse/DC Over \$1,000,000	Dividends	\$15,001 - \$50,000	☐
JKD 09 LLC ⇒ Forbright, Inc. [PS] DESCRIPTION: Bank stock	SP	Spouse/DC Over \$1,000,000	None		☐
JKD 09 LLC ⇒ Wells Fargo, N.A. [BA]	SP	\$1,000,001 - \$5,000,000	Interest	\$2,501 - \$5,000	☐
Mazara, LLC ⇒ Investment in Real Property [RP]	SP	\$500,001 - \$1,000,000	Rent	\$50,001 - \$100,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Cabo, San Lucas, MX					
Parkglen, LLC ⇒ Demand loan to family member [DO]	DC	\$250,001 - \$500,000	Interest	\$2,501 - \$5,000	☐
DESCRIPTION: Dependent Child #1					
Parkglen, LLC ⇒ Demand loan to family member [DO]	DC	\$250,001 - \$500,000	Interest	\$2,501 - \$5,000	☐
DESCRIPTION: Dependent Child #2					
Parkglen, LLC ⇒ Wells Fargo - Checking [BA]	DC	\$1,001 - \$15,000	None		☐
DESCRIPTION: Dependent Child #1					
Parkglen, LLC ⇒ Wells Fargo - Checking [BA]	DC	\$1,001 - \$15,000	None		☐
DESCRIPTION: Dependent Child #2					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Acacia Partners, LP [HE]	DC	Spouse/DC Over \$1,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
DESCRIPTION: Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Alliance Partners Holdings, LLC [OL]	DC	\$100,001 - \$250,000	None		☐
LOCATION: Chevy Chase, MD, US					
DESCRIPTION: Banking					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ American Steadfast, LP [HE]	DC	Spouse/DC Over \$1,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
DESCRIPTION: Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab Bank [BA]	DC	\$50,001 - \$100,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Demand loan to family member [DO]	DC	\$250,001 - \$500,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Enlightenment Capital Solutions Fund II, LP [HE]	DC	\$15,001 - \$50,000	Partnership Income	\$100,001 - \$1,000,000	☐
DESCRIPTION: private equity in buyout growth Fund manager letter on file with the Committee on Ethics.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Enlightenment Capital Solutions Fund III, LP [HE] DESCRIPTION: private equity in buyout growth Fund manager letter on file with the Committee on Ethics.	DC	\$100,001 - \$250,000	Partnership Income	\$50,001 - \$100,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Enlightenment Capital Solutions Fund IV, LP [HE] DESCRIPTION: pooled investment fund Fund manager letter on file with the Committee on Ethics.	DC	\$15,001 - \$50,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Forbright, Inc. [PS] DESCRIPTION: Bank stock	DC	\$100,001 - \$250,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Galvanize Innovation & Expansion Fund I, LP (HCP SPV) [OT] DESCRIPTION: private equity	DC	\$250,001 - \$500,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ GPC Partners Co-Investment (Chico), LP [OT] DESCRIPTION: pooled investment fund Fund manager letter on file with the Committee on Ethics.	DC	None	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ HCP Private Equity Fund IX, LP [OT] DESCRIPTION: private equity Fund manager letter on file with the Committee on Ethics.	DC	\$250,001 - \$500,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ HCP Private Equity Fund VII, LP [OT] DESCRIPTION: private equity Fund manager letter on file with the Committee on Ethics.	DC	\$250,001 - \$500,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ HCP Private Equity Fund VIII, LP [OT] DESCRIPTION: private equity Fund manager letter on file with the Committee on Ethics.	DC	Spouse/DC Over \$1,000,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Healthpoint Capital Partners II, LP [HE]	DC	\$1,001 - \$15,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family	DC	\$1,000,001 -	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Trust FBO Dependent Child #1 ⇒ Hellman & Friedman Capital Partners IX, LP [OT]		\$5,000,000			☐
DESCRIPTION: private equity Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Mulberry Street [OT]	DC	\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000	☐
DESCRIPTION: Mutual Fund					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Oakmark International Fund Investor Class (OAKIX) [MF]	DC	\$1,000,001 - \$5,000,000	Dividends	\$50,001 - \$100,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Ponderosa Ventures Fund I [OT]	DC	\$15,001 - \$50,000	None		☐
DESCRIPTION: private equity Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Revolution Growth GP IV, LP [OT]	DC	\$250,001 - \$500,000	None		☐
DESCRIPTION: venture capital fund Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Money Market [BA]	DC	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Zephyr AI [PS]	DC	\$100,001 - \$250,000	None		☐
DESCRIPTION: high-growth healthcare technology company					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ A.O. Smith Corporation Common Stock (AOS) [ST]	DC	None	Dividends	\$1 - \$200	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Bio-Techne Corp (TECH) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]	DC	\$15,001 - \$50,000	None		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Brown & Brown, Inc. (BRO) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ CACI International, Inc. Class A Common Stock (CACI) [ST]	DC	None	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ CDW Corporation - Common Stock (CDW) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Clean Harbors, Inc. (CLH) [ST]	DC	\$15,001 - \$50,000	Capital Gains	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Core & Main, Inc. Class A Common Stock (CNM) [ST]	DC	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Corpay, Inc. Common Stock (CPAY) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Dayforce, Inc. Common Stock (DAY) [ST]	DC	None	Capital Gains, Dividends	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ EMCOR Group, Inc. Common Stock (EME) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Entegris, Inc. - Common Stock (ENTG) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab -	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brokerage #1 ⇒ Fortune Brands Innovations, Inc. Common Stock (FBIN) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ ITT Inc. Common Stock (ITT) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Jones Lang LaSalle Incorporated Common Stock (JLL) [ST]	DC	\$15,001 - \$50,000	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Labcorp Holdings Inc. Common Stock (LH) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Live Nation Entertainment, Inc. Common Stock (LYV) [ST]	DC	\$50,001 - \$100,000	Capital Gains	\$1,001 - \$2,500	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Markel Group Inc. Common Stock (MKL) [ST]	DC	\$50,001 - \$100,000	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Martin Marietta Materials, Inc. Common Stock (MLM) [ST]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Morningstar, Inc. - Common Stock (MORN) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Nasdaq, Inc. - Common Stock (NDAQ) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	☒

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SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Paychex, Inc. - Common Stock (PAYX) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ PTC Inc. - Common Stock (PTC) [ST]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Quanta Services, Inc. Common Stock (PWR) [ST]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Revvity, Inc. Common Stock (RVTY) [ST]	DC	None	Capital Gains, Dividends	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Service Corporation International Common Stock (SCI) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Signet Jewelers Limited Common Shares (SIG) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Somnigroup International Inc. Common Stock (SGI) [ST] DESCRIPTION: Formerly Tempur Sealy International (TPX)	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ STERIS plc (STE) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Teledyne Technologies Incorporated Common Stock (TDY) [ST]	DC	\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ The Middleby Corporation - Common Stock (MIDD) [ST]	DC	\$15,001 - \$50,000	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Toro Company (TTC) [ST]	DC	None	Capital Gains, Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Tractor Supply Company - Common Stock (TSCO) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Trimble Inc. - Common Stock (TRMB) [ST]	DC	\$15,001 - \$50,000	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond [GS]	DC	\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Viking Holdings Ltd Ordinary Shares (VIK) [ST]	DC	\$50,001 - \$100,000	Capital Gains	\$1,001 - \$2,500	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 ⇒ Westinghouse Air Brake Technologies Corporation Common Stock (WAB) [ST]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Anne Arundel Cnty MD; 5%; Due 10/1/2028 [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore Cnty MD Consol Public Impt 5%; Due 3/1/2027 [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family	DC	\$15,001 - \$50,000	Interest	\$201 -	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore, MD Revenue Wastewater Series B [GS]				\$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Brunswick, MD, bond [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Connecticut St Health & Educational Ser-L [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Illinois State, bond [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Indianapolis, IN Local Public, bond [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Department of Transportation - 5%; Due 12/1/2028 [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Health & Higher Educational [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State, bond [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Montgomery County, MD, bond [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Pennsylvania St Turnpike Ser A; 4%; Due 12/1/2028 [GS]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond; 4%; Due 7/1/2032 [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Providence, RI, bond [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ University Systems of Maryland Auxiliary [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Washington, MD Suburban Sanitary District [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 ⇒ Worcester County, MD, bond [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Acacia Partners, LP [HE]	DC	\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
DESCRIPTION: Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Alliance Partners Holdings, LLC [OL]	DC	\$250,001 - \$500,000	None		☐
LOCATION: Chevy Chase, MD, US					
DESCRIPTION: Banking					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ American Steadfast, LP [HE]	DC	Spouse/DC Over \$1,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
DESCRIPTION: Fund manager letter on file with the Committee on Ethics.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab Bank [BA]	DC	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Demand loan to family member [DO]	DC	\$250,001 - \$500,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Enlightenment Capital Solutions Fund II, LP [HE] DESCRIPTION: private equity in buyout growth Fund manager letter on file with the Committee on Ethics.	DC	\$15,001 - \$50,000	Partnership Income	\$100,001 - \$1,000,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Enlightenment Capital Solutions Fund III, LP [HE] DESCRIPTION: private equity in buyout growth Fund manager letter on file with the Committee on Ethics.	DC	\$100,001 - \$250,000	Partnership Income	\$15,001 - \$50,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Enlightenment Capital Solutions Fund IV, LP [HE] DESCRIPTION: pooled investment fund Fund manager letter on file with the Committee on Ethics.	DC	\$15,001 - \$50,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Forbright, Inc. [PS] DESCRIPTION: Bank stock	DC	\$100,001 - \$250,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Galvanize Innovation & Expansion Fund I, LP (HCP SPV) [OT] DESCRIPTION: private equity	DC	\$250,001 - \$500,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ GPC Partners Co-Investment (Chico), LP [OT] DESCRIPTION: pooled investment fund Fund manager letter on file with the Committee on Ethics.	DC	\$15,001 - \$50,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ HCP Private Equity Fund IX, LP [OT] DESCRIPTION: private equity Fund manager letter on file with the Committee on Ethics.	DC	\$250,001 - \$500,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒	DC	\$250,001 - \$500,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
HCP Private Equity Fund VII, LP [OT]					
DESCRIPTION: private equity Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ HCP Private Equity Fund VIII, LP [OT]	DC	Spouse/DC Over \$1,000,000	None		☐
DESCRIPTION: private equity Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Healthpoint Capital Partners II, LP [HE]	DC	\$1,001 - \$15,000	None		☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Hellman & Friedman Capital Partners IX, LP [OT]	DC	\$1,000,001 - \$5,000,000	None		☐
DESCRIPTION: private equity Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Mulberry Street [OT]	DC	Spouse/DC Over \$1,000,000	Dividends	\$100,001 - \$1,000,000	☐
DESCRIPTION: Mutual Fund					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Oakmark International Fund Investor Class (OAKIX) [MF]	DC	\$1,000,001 - \$5,000,000	Dividends	\$50,001 - \$100,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Ponderosa Ventures Fund I [OT]	DC	\$15,001 - \$50,000	None		☐
DESCRIPTION: private equity Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Revolution Growth GP IV, LP [OT]	DC	\$250,001 - \$500,000	None		☐
DESCRIPTION: venture capital fund Fund manager letter on file with the Committee on Ethics.					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Money Market [BA]	DC	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Zephyr AI [PS]	DC	\$100,001 - \$250,000	None		☐
DESCRIPTION: high-growth healthcare technology company					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family	DC	None	Dividends	\$1 - \$200	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ A.O. Smith Corporation Common Stock (AOS) [ST]					
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Bio-Techne Corp - Common Stock (TECH) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]	DC	\$15,001 - \$50,000	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ CACI International, Inc. Class A Common Stock (CACI) [ST]	DC	None	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ CDW Corporation - Common Stock (CDW) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Clean Harbors, Inc. Common Stock (CLH) [ST]	DC	\$15,001 - \$50,000	Capital Gains	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Core & Main, Inc. Class A Common Stock (CNM) [ST]	DC	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Corpay, Inc. Common Stock (CPAY) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Dayforce, Inc. Common Stock (DAY) [ST]	DC	None	Capital Gains, Dividends	\$2,501 - \$5,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ EMCOR Group, Inc. Common Stock (EME) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Entegris, Inc. - Common Stock (ENTG) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Fortune Brands Innovations, Inc. Common Stock (FBIN) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ ITT Inc. Common Stock (ITT) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Jones Lang LaSalle Incorporated Common Stock (JLL) [ST]	DC	\$15,001 - \$50,000	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Labcorp Holdings Inc. Common Stock (LH) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Live Nation Entertainment, Inc. Common Stock (LYV) [ST]	DC	\$50,001 - \$100,000	Capital Gains	\$1,001 - \$2,500	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Markel Group Inc. Common Stock (MKL) [ST]	DC	\$50,001 - \$100,000	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family	DC	\$50,001 -	Capital Gains,	\$1,001 -	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Martin Marietta Materials, Inc. Common Stock (MLM) [ST]		\$100,000	Dividends	\$2,500	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Morningstar, Inc. - Common Stock (MORN) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Nasdaq, Inc. - Common Stock (NDAQ) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Paychex, Inc. - Common Stock (PAYX) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ PTC Inc. - Common Stock (PTC) [ST]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Quanta Services, Inc. Common Stock (PWR) [ST]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Revvity, Inc. Common Stock (RVTY) [ST]	DC	None	Capital Gains, Dividends	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Service Corporation International Common Stock (SCI) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Signet Jewelers Limited Common Shares (SIG) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Somnigroup International Inc. Common Stock (SGI) [ST]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ STERIS plc (STE) [ST]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Teledyne Technologies Incorporated Common Stock (TDY) [ST]	DC	\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ The Middleby Corporation - Common Stock (MIDD) [ST]	DC	\$15,001 - \$50,000	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Toro Company (TTC) [ST]	DC	None	Capital Gains, Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Tractor Supply Company - Common Stock (TSCO) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Trimble Inc. - Common Stock (TRMB) [ST]	DC	\$15,001 - \$50,000	None		☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ U.S. Treasury bond [GS]	DC	\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Viking Holdings Ltd Ordinary Shares (VIK) [ST]	DC	\$50,001 - \$100,000	Capital Gains	\$1,001 - \$2,500	☒
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 ⇒ Westinghouse Air Brake Technologies Corporation Common Stock (WAB) [ST]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Anne Arundel Cnty MD; 5%; Due 10/1/2028 [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore Cnty MD Consol Public Impt 5%; Due 3/1/2027 [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Baltimore, MD Revenue Wastewater Series B [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Brunswick, MD, bond [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Connecticut St Health & Educational Ser-L [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Illinois State, bond [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Indianapolis, IN Local Public, bond [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Department of Transportation 5%; Due 12/1/2028 [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State Health & Higher Educational [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Maryland State, bond [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Montgomery County, MD, bond [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Pennsylvania St Turnpike Ser A; 4%; Due 12/1/2028 [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Prince George's County, MD, bond; 4%; Due 7/1/2032 [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Providence, RI, bond [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ University Systems of Maryland Auxiliary [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Washington, MD Suburban Sanitary District [GS]	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 ⇒ Worcester County, MD, bond [GS]	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
TLM Trust ⇒ Wells Fargo - Checking [BA]		\$15,001 - \$50,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo - Brokerage #1 ⇒ Allspring 100% Treasury Money Market [BA]	JT	\$5,000,001 - \$25,000,000	Interest	\$100,001 - \$1,000,000	☐
Wells Fargo - Brokerage #1 ⇒ Anne Arundel County, MD Special Obligation - Refunding National Business Park [GS] DESCRIPTION: DTD 06/07/18 5.00% 07/01/2025	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #1 ⇒ BALTIMORE MD PROJ REVENUE SUB-WST WTR PROJ- SER A [GS] DESCRIPTION: DTD 02/09/17 5.00% 07/01/2025	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	☐
Wells Fargo - Brokerage #1 ⇒ Black Belt Energy Gas Dist AL Ser D1 [GS] DESCRIPTION: DTD 7/1/22; Due 7/1/2052	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	☐
Wells Fargo - Brokerage #1 ⇒ Cecil County, MD, bond [GS] DESCRIPTION: DTD 12/14/17 5.00% 08/01/2028	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #1 ⇒ Charles County, MD, bond [GS] DESCRIPTION: DTD 09/30/14 5.00% 10/01/2024	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #1 ⇒ Howard County, MD, bond [GS] DESCRIPTION: DTD 03/30/16 5.00% 02/15/2024	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #1 ⇒ Johnson & Miami County, bond [GS] DESCRIPTION: DTD 03/01/21 1.28% 09/01/2028	JT	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	☐
Wells Fargo - Brokerage #1 ⇒ Kaufman County, TX, bond [GS] DESCRIPTION: DTD 09/01/16 4.00% 02/15/2026	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #1 ⇒ Kentucky Cnty TX Road, bond [GS] DESCRIPTION: DTD 02/08/17 5.00% 04/01/2031	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #1 ⇒ Manhattan KS Ref- Ser-A [GS] DESCRIPTION: DTD 06/05/23 5.00% 11/01/2026	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo - Brokerage #1 ⇒ Maryland St First Series [GS] DESCRIPTION: DTD 06/22/16 4.00% 06/01/2030	JT	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	☐
Wells Fargo - Brokerage #1 ⇒ Maryland St Stadium Auth Revenue Ser A [GS] DESCRIPTION: DTD 07/06/23 5.00% 03/01/2032	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	☐
Wells Fargo - Brokerage #1 ⇒ Maryland State Department of Transportation [GS] DESCRIPTION: DTD 10/22/20 5.00% 10/01/2025	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #1 ⇒ Maryland State Health & Higher Educational - Ref-Peninsula Regional Health [GS] DESCRIPTION: DTD 05/13/20 5.00% 07/01/2029	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	☐
Wells Fargo - Brokerage #1 ⇒ Montgomery County, MD Ref-Ser B [GS] DESCRIPTION: DTD 08/05/20 4.00% 11/01/2024	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	☐
Wells Fargo - Brokerage #1 ⇒ New Jersey Educational Fac Aut Rev Ser A [GS] DESCRIPTION: DTD 04/05/22 5.00% 07/01/2029	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #1 ⇒ Prince George's County, MD Cops Hampton Park [GS] DESCRIPTION: DTD 06/06/19 5.00% 10/01/2028	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	☐
Wells Fargo - Brokerage #1 ⇒ University System of Maryland Auxiliary Facility and Tuition Rev bond [GS] DESCRIPTION: DTD 02/24/21 5.00% 04/01/2030	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #1 ⇒ Vanguard Limited-Term Tax-Exempt Fund [MF]	JT	\$50,001 - \$100,000	None		☐
Wells Fargo - Brokerage #1 ⇒ Washington MD Suburban San Dis Cons Public Impt [GS] DESCRIPTION: DTD 04/29/14 4.00% 06/01/2039	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	☐
Wells Fargo - Brokerage #1 ⇒ Washington State Health Care Facilities, bond [GS] DESCRIPTION: DTD 08/21/19 5.00% 08/01/2026	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo - Brokerage #1 ⇒ Washington Suburban Sanitary District, MD, [GS] DESCRIPTION: DTD 12/02/14 4.00% 06/01/2025	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #1 ⇒ Wicomico County, MD, bond [GS] DESCRIPTION: DTD 11/03/15 5.00% 11/01/2024	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	☐
Wells Fargo - Brokerage #1 ⇒ Worcester Cnty MD Consol Public Impt [GS] DESCRIPTION: DTD 04/16/19 5.00% 08/01/2029	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Wells Fargo - Brokerage #2 ⇒ Indiabulls Real Estate Ltd Sponsored GDR Reg S (real estate) [OT] DESCRIPTION: ADR stock	JT	None	None		☐
Wells Fargo - Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		☐
Wells Fargo - Roth IRA ⇒ Virtus Tactical AllocationFund Class A (NAINX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		☐
Wells Fargo - Roth IRA ⇒ Wells Fargo - Cash [IH]	SP	\$50,001 - \$100,000	Tax-Deferred		☐
Wells Fargo - Roth IRA ⇒ Wells Fargo Money Market Fund Class A Shares (STGXX) [MF] DESCRIPTION: Money Market		\$50,001 - \$100,000	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?
Core & Main, Inc. Class A Common Stock (CNM) [ST]	DC	02/08/2025	P	\$1,001 - \$15,000	
Fortune Brands Innovations, Inc. Common Stock (FBIN) [ST]	DC	02/08/2025	P	\$1,001 - \$15,000	
Labcorp Holdings Inc. Common Stock (LH) [ST]	DC	02/08/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Paychex, Inc. - Common Stock (PAYX) [ST]	DC	02/09/2025	P	\$1,001 - \$15,000	
Tractor Supply Company - Common Stock (TSCO) [ST]	DC	02/09/2025	P	\$1,001 - \$15,000	
Tempur Sealy International, Inc. Common Stock (TPX) [ST]	DC	02/15/2025	S (partial)	\$1,001 - \$15,000	☒
Tempur Sealy International, Inc. Common Stock (TPX) [ST]	DC	02/16/2025	S (partial)	\$1,001 - \$15,000	☒
Tempur Sealy International, Inc. Common Stock (TPX) [ST]	DC	02/17/2025	S (partial)	\$1,001 - \$15,000	☒
Entegris, Inc. - Common Stock (ENTG) [ST]	DC	02/17/2025	P	\$1,001 - \$15,000	
Fortune Brands Innovations, Inc. Common Stock (FBIN) [ST]	DC	02/17/2025	P	\$1,001 - \$15,000	
Labcorp Holdings Inc. Common Stock (LH) [ST]	DC	02/17/2025	P	\$1,001 - \$15,000	
Viking Holdings Ltd Ordinary Shares (VIK) [ST]	DC	02/17/2025	P	\$1,001 - \$15,000	
Tempur Sealy International, Inc. Common Stock (TPX) [ST]	DC	02/21/2025	S (partial)	\$1,001 - \$15,000	☒
Paychex, Inc. - Common Stock (PAYX) [ST]	DC	02/21/2025	P	\$1,001 - \$15,000	
CACI International, Inc. Class A Common Stock (CACI) [ST]	DC	02/22/2025	S (partial)	\$1,001 - \$15,000	☐
Teledyne Technologies Incorporated Common Stock (TDY) [ST]	DC	02/22/2025	S (partial)	\$15,001 - \$50,000	☒
Tempur Sealy International, Inc. Common Stock (TPX) [ST]	DC	02/22/2025	S (partial)	\$1,001 - \$15,000	☒
Corpay, Inc. Common Stock (CPAY) [ST]	DC	02/22/2025	P	\$1,001 - \$15,000	
CACI International, Inc. Class A Common Stock (CACI) [ST]	DC	02/27/2025	P	\$1,001 - \$15,000	
Labcorp Holdings Inc. Common Stock (LH) [ST]	DC	02/27/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Paychex, Inc. - Common Stock (PAYX) [ST]	DC	02/27/2025	P	\$1,001 - \$15,000	
Revvity, Inc. Common Stock (RVTY) [ST]	DC	02/28/2025	S	\$15,001 - \$50,000	☒
Tempur Sealy International, Inc. Common Stock (TPX) [ST]	DC	02/28/2025	S (partial)	\$1,001 - \$15,000	☒
Corpay, Inc. Common Stock (CPAY) [ST]	DC	02/28/2025	P	\$15,001 - \$50,000	
Labcorp Holdings Inc. Common Stock (LH) [ST]	DC	02/28/2025	P	\$1,001 - \$15,000	
Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	02/05/2025	S (partial)	\$1,001 - \$15,000	☒
Labcorp Holdings Inc. Common Stock (LH) [ST]	DC	02/05/2025	P	\$1,001 - \$15,000	
Paychex, Inc. - Common Stock (PAYX) [ST]	DC	02/05/2025	P	\$1,001 - \$15,000	
Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	02/06/2025	S (partial)	\$1,001 - \$15,000	☒
CDW Corporation - Common Stock (CDW) [ST]	DC	02/06/2025	P	\$1,001 - \$15,000	
Corpay, Inc. Common Stock (CPAY) [ST]	DC	02/06/2025	P	\$1,001 - \$15,000	
Clean Harbors, Inc. Common Stock (CLH) [ST]	DC	02/07/2025	S (partial)	\$1,001 - \$15,000	☒
Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	02/10/2025	S (partial)	\$1,001 - \$15,000	☒
Clean Harbors, Inc. Common Stock (CLH) [ST]	DC	02/10/2025	S (partial)	\$1,001 - \$15,000	☒
Trimble Inc. - Common Stock (TRMB) [ST]	DC	02/10/2025	S (partial)	\$1,001 - \$15,000	☐
Live Nation Entertainment, Inc. Common Stock (LYV) [ST]	DC	02/14/2025	S (partial)	\$1,001 - \$15,000	☒
CACI International, Inc. Class A Common Stock (CACI) [ST]	DC	02/18/2025	S (partial)	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
A.O. Smith Corporation Common Stock (AOS) [ST]	DC	02/18/2025	S (partial)	\$15,001 - \$50,000	☐
ITT Inc. Common Stock (ITT) [ST]	DC	03/05/2025	P	\$1,001 - \$15,000	
Jones Lang LaSalle Incorporated Common Stock (JLL) [ST]	DC	03/05/2025	P	\$1,001 - \$15,000	
Viking Holdings Ltd Ordinary Shares (VIK) [ST]	DC	03/05/2025	P	\$1,001 - \$15,000	
A.O. Smith Corporation Common Stock (AOS) [ST]	DC	03/06/2025	S (partial)	\$1,001 - \$15,000	☐
Markel Group Inc. Common Stock (MKL) [ST]	DC	03/06/2025	P	\$1,001 - \$15,000	
Jones Lang LaSalle Incorporated Common Stock (JLL) [ST]	DC	03/07/2025	P	\$1,001 - \$15,000	
Markel Group Inc. Common Stock (MKL) [ST]	DC	03/07/2025	P	\$15,001 - \$50,000	
Jones Lang LaSalle Incorporated Common Stock (JLL) [ST]	DC	03/10/2025	P	\$1,001 - \$15,000	
Markel Group Inc. Common Stock (MKL) [ST]	DC	03/10/2025	P	\$1,001 - \$15,000	
Corpay, Inc. Common Stock (CPAY) [ST]	DC	03/13/2025	P	\$1,001 - \$15,000	
BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]	DC	03/14/2025	P	\$1,001 - \$15,000	
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	03/14/2025	P	\$1,001 - \$15,000	
Jones Lang LaSalle Incorporated Common Stock (JLL) [ST]	DC	03/14/2025	P	\$1,001 - \$15,000	
BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]	DC	03/17/2025	P	\$1,001 - \$15,000	
Dayforce, Inc. Common Stock (DAY) [ST]	DC	03/18/2025	S (partial)	\$15,001 - \$50,000	☐
Toro Company (TTC) [ST]	DC	03/20/2025	S (partial)	\$1,001 - \$15,000	☐
Westinghouse Air Brake Technologies Corporation Common Stock (WAB) [ST]	DC	03/25/2025	S (partial)	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
PTC Inc. - Common Stock (PTC) [ST]	DC	04/01/2025	S (partial)	\$1,001 - \$15,000	☒
BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]	DC	04/01/2025	P	\$1,001 - \$15,000	
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	04/01/2025	P	\$1,001 - \$15,000	
CACI International, Inc. Class A Common Stock (CACI) [ST]	DC	04/02/2025	S	\$1,001 - \$15,000	☐
Toro Company (TTC) [ST]	DC	04/02/2025	S (partial)	\$1,001 - \$15,000	☐
BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]	DC	04/04/2025	P	\$1,001 - \$15,000	
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	04/04/2025	P	\$1,001 - \$15,000	
Core & Main, Inc. Class A Common Stock (CNM) [ST]	DC	04/07/2025	P	\$1,001 - \$15,000	
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	04/07/2025	P	\$1,001 - \$15,000	
Bio-Techne Corp - Common Stock (TECH) [ST]	DC	04/09/2025	P	\$1,001 - \$15,000	
BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]	DC	04/09/2025	P	\$1,001 - \$15,000	
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	04/09/2025	P	\$1,001 - \$15,000	
Markel Group Inc. Common Stock (MKL) [ST]	DC	04/09/2025	P	\$1,001 - \$15,000	
Paychex, Inc. - Common Stock (PAYX) [ST]	DC	04/09/2025	P	\$1,001 - \$15,000	
A.O. Smith Corporation Common Stock (AOS) [ST]	DC	04/10/2025	S (partial)	\$1,001 - \$15,000	☐
Toro Company (TTC) [ST]	DC	04/10/2025	S (partial)	\$1,001 - \$15,000	☐
A.O. Smith Corporation Common Stock (AOS) [ST]	DC	04/16/2025	S	\$1,001 - \$15,000	☐
Markel Group Inc. Common Stock (MKL) [ST]	DC	04/24/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dayforce, Inc. Common Stock (DAY) [ST]	DC	04/28/2025	S (partial)	\$1,001 - \$15,000	☐
Toro Company (TTC) [ST]	DC	04/29/2025	S (partial)	\$1,001 - \$15,000	☐
Bio-Techne Corp - Common Stock (TECH) [ST]	DC	04/29/2025	P	\$1,001 - \$15,000	
Tractor Supply Company - Common Stock (TSCO) [ST]	DC	05/05/2025	P	\$1,001 - \$15,000	
Dayforce, Inc. Common Stock (DAY) [ST]	DC	05/07/2025	S (partial)	\$1,001 - \$15,000	☐
Markel Group Inc. Common Stock (MKL) [ST]	DC	05/07/2025	P	\$1,001 - \$15,000	
Tractor Supply Company - Common Stock (TSCO) [ST]	DC	05/13/2025	P	\$1,001 - \$15,000	
Markel Group Inc. Common Stock (MKL) [ST]	DC	05/13/2025	P	\$1,001 - \$15,000	
Dayforce, Inc. Common Stock (DAY) [ST]	DC	05/27/2025	S (partial)	\$1,001 - \$15,000	☐
Markel Group Inc. Common Stock (MKL) [ST]	DC	05/27/2025	P	\$1,001 - \$15,000	
Tractor Supply Company - Common Stock (TSCO) [ST]	DC	05/27/2025	P	\$1,001 - \$15,000	
Toro Company (TTC) [ST]	DC	05/28/2025	S	\$1,001 - \$15,000	☒
Fortune Brands Innovations, Inc. Common Stock (FBIN) [ST]	DC	05/29/2025	S (partial)	\$15,001 - \$50,000	☐
Markel Group Inc. Common Stock (MKL) [ST]	DC	06/06/2025	P	\$1,001 - \$15,000	
Tractor Supply Company - Common Stock (TSCO) [ST]	DC	06/06/2025	P	\$1,001 - \$15,000	
Clean Harbors, Inc. Common Stock (CLH) [ST]	DC	06/20/2025	S (partial)	\$1,001 - \$15,000	☒
Bio-Techne Corp - Common Stock (TECH) [ST]	DC	05/26/2025	S (partial)	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
STERIS plc (STE) [ST]	DC	06/26/2025	S (partial)	\$1,001 - \$15,000	☒
Paychex, Inc. - Common Stock (PAYX) [ST]	DC	06/26/2025	P	\$1,001 - \$15,000	
Entegris, Inc. - Common Stock (ENTG) [ST]	DC	07/09/2025	S (partial)	\$1,001 - \$15,000	☐
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	07/09/2025	S (partial)	\$1,001 - \$15,000	☒
CDW Corporation - Common Stock (CDW) [ST]	DC	07/09/2025	P	\$1,001 - \$15,000	
Markel Group Inc. Common Stock (MKL) [ST]	DC	07/09/2025	P	\$1,001 - \$15,000	
PTC Inc. - Common Stock (PTC) [ST]	DC	07/11/2025	P	\$1,001 - \$15,000	
Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	07/25/2025	P	\$1,001 - \$15,000	
Markel Group Inc. Common Stock (MKL) [ST]	DC	07/25/2025	P	\$1,001 - \$15,000	
Paychex, Inc. - Common Stock (PAYX) [ST]	DC	07/23/2025	P	\$1,001 - \$15,000	
Entegris, Inc. - Common Stock (ENTG) [ST]	DC	07/28/2025	S (partial)	\$1,001 - \$15,000	☐
Bio-Techne Corp - Common Stock (TECH) [ST]	DC	08/01/2025	S (partial)	\$1,001 - \$15,000	☐
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	08/01/2025	S (partial)	\$1,001 - \$15,000	☒
Martin Marietta Materials, Inc. Common Stock (MLM) [ST]	DC	08/01/2025	S (partial)	\$1,001 - \$15,000	☒
Markel Group Inc. Common Stock (MKL) [ST]	DC	08/01/2025	P	\$15,001 - \$50,000	
Morningstar, Inc. - Common Stock (MORN) [ST]	DC	08/02/2025	P	\$15,001 - \$50,000	
PTC Inc. - Common Stock (PTC) [ST]	DC	08/01/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Core & Main, Inc. Class A Common Stock (CNM) [ST]	DC	08/04/2025	S (partial)	\$15,001 - \$50,000	☒
Clean Harbors, Inc. Common Stock (CLH) [ST]	DC	08/07/2025	S (partial)	\$1,001 - \$15,000	☒
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	08/07/2025	S (partial)	\$1,001 - \$15,000	☒
Jones Lang LaSalle Incorporated Common Stock (JLL) [ST]	DC	08/07/2025	P	\$1,001 - \$15,000	
Markel Group Inc. Common Stock (MKL) [ST]	DC	08/07/2025	P	\$1,001 - \$15,000	
Core & Main, Inc. Class A Common Stock (CNM) [ST]	DC	08/11/2025	S (partial)	\$15,001 - \$50,000	☒
Viking Holdings Ltd Ordinary Shares (VIK) [ST]	DC	08/13/2025	S (partial)	\$1,001 - \$15,000	☒
Dayforce, Inc. Common Stock (DAY) [ST]	DC	08/19/2025	S (partial)	\$15,001 - \$50,000	☒
Markel Group Inc. Common Stock (MKL) [ST]	DC	08/21/2025	P	\$15,001 - \$50,000	
BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]	DC	08/25/2025	P	\$1,001 - \$15,000	
Dayforce, Inc. Common Stock (DAY) [ST]	DC	09/11/2025	S	\$1,001 - \$15,000	☒
STERIS plc (STE) [ST]	DC	09/11/2025	P	\$1,001 - \$15,000	
The Middleby Corporation - Common Stock (MIDD) [ST]	DC	09/18/2025	S (partial)	\$1,001 - \$15,000	☐
Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	09/18/2025	P	\$1,001 - \$15,000	
Jones Lang LaSalle Incorporated Common Stock (JLL) [ST]	DC	09/18/2025	P	\$1,001 - \$15,000	
STERIS plc (STE) [ST]	DC	09/18/2025	P	\$1,001 - \$15,000	
Somnigroup International Inc. Common Stock (SGI) [ST]	DC	09/19/2025	S (partial)	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Nasdaq, Inc. - Common Stock (NDAQ) [ST]	DC	09/19/2025	P	\$15,001 - \$50,000	
Paychex, Inc. - Common Stock (PAYX) [ST]	DC	10/01/2025	P	\$1,001 - \$15,000	
Nasdaq, Inc. - Common Stock (NDAQ) [ST]	DC	10/09/2025	P	\$1,001 - \$15,000	
BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]	DC	10/15/2025	P	\$1,001 - \$15,000	
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	10/16/2025	S (partial)	\$1,001 - \$15,000	☒
BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]	DC	10/16/2025	P	\$1,001 - \$15,000	
The Middleby Corporation - Common Stock (MIDD) [ST]	DC	10/22/2025	S (partial)	\$1,001 - \$15,000	☐
Bio-Techne Corp - Common Stock (TECH) [ST]	DC	10/22/2025	P	\$1,001 - \$15,000	
Nasdaq, Inc. - Common Stock (NDAQ) [ST]	DC	10/22/2025	P	\$15,001 - \$50,000	
Fortune Brands Innovations, Inc. Common Stock (FBIN) [ST]	DC	10/29/2025	S (partial)	\$1,001 - \$15,000	☐
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	10/29/2025	S (partial)	\$1,001 - \$15,000	☒
Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	10/29/2025	P	\$1,001 - \$15,000	
Labcorp Holdings Inc. Common Stock (LH) [ST]	DC	10/29/2025	P	\$1,001 - \$15,000	
Fortune Brands Innovations, Inc. Common Stock (FBIN) [ST]	DC	10/31/2025	S (partial)	\$1,001 - \$15,000	☐
Teledyne Technologies Incorporated Common Stock (TDY) [ST]	DC	10/31/2025	S (partial)	\$1,001 - \$15,000	☒
Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	10/31/2025	P	\$1,001 - \$15,000	
Labcorp Holdings Inc. Common Stock (LH) [ST]	DC	10/31/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Tractor Supply Company - Common Stock (TSCO) [ST]	DC	10/31/2025	P	\$1,001 - \$15,000	
Markel Group Inc. Common Stock (MKL) [ST]	DC	11/03/2025	P	\$1,001 - \$15,000	
EMCOR Group, Inc. Common Stock (EME) [ST]	DC	11/17/2025	S (partial)	\$1,001 - \$15,000	☒
Quanta Services, Inc. Common Stock (PWR) [ST]	DC	11/17/2025	S (partial)	\$1,001 - \$15,000	☒
Labcorp Holdings Inc. Common Stock (LH) [ST]	DC	11/17/2025	P	\$1,001 - \$15,000	
Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	11/20/2025	P	\$1,001 - \$15,000	
CDW Corporation - Common Stock (CDW) [ST]	DC	12/02/2025	S (partial)	\$1,001 - \$15,000	☐
IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	DC	12/02/2025	S (partial)	\$1,001 - \$15,000	☒
PTC Inc. - Common Stock (PTC) [ST]	DC	12/02/2025	S (partial)	\$1,001 - \$15,000	☐
Quanta Services, Inc. Common Stock (PWR) [ST]	DC	12/02/2025	S (partial)	\$1,001 - \$15,000	☒
Teledyne Technologies Incorporated Common Stock (TDY) [ST]	DC	12/02/2025	S (partial)	\$1,001 - \$15,000	☒
Bio-Techne Corp - Common Stock (TECH) [ST]	DC	12/02/2025	P	\$1,001 - \$15,000	
Live Nation Entertainment, Inc. Common Stock (LYV) [ST]	DC	12/02/2025	P	\$1,001 - \$15,000	
Martin Marietta Materials, Inc. Common Stock (MLM) [ST]	DC	12/02/2025	P	\$1,001 - \$15,000	
Tractor Supply Company - Common Stock (TSCO) [ST]	DC	12/02/2025	P	\$1,001 - \$15,000	
Clean Harbors, Inc. Common Stock (CLH) [ST]	DC	12/03/2025	P	\$1,001 - \$15,000	
CDW Corporation - Common Stock (CDW) [ST]	DC	12/05/2025	S (partial)	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
PTC Inc. - Common Stock (PTC) [ST]	DC	12/05/2025	S (partial)	\$1,001 - \$15,000	☐
Bio-Techne Corp - Common Stock (TECH) [ST]	DC	12/05/2025	P	\$1,001 - \$15,000	
Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	12/05/2025	P	\$1,001 - \$15,000	
Brown & Brown, Inc. Common Stock (BRO) [ST]	DC	12/12/2025	P	\$1,001 - \$15,000	
Tractor Supply Company - Common Stock (TSCO) [ST]	DC	12/12/2025	P	\$1,001 - \$15,000	

* 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
Forbright, Inc.	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo	October 2024	Portfolio Loan	\$1,000,001 - \$5,000,000
	Wells Fargo	December 2023	Portfolio Loan	\$1,000,001 - \$5,000,000
JT	Family Investments LLC - Family Trust	2011	Investment Loan	\$1,000,001 - \$5,000,000
JT	St. Simons Bank & Trust	2021	Mortgage (investment/rental property)	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Northwestern University Board of Trustees
Investment Manager	AMD 09 LLC
Washington Director & Board Member	Common Sense Media
COMMENTS: Resigned January 2022	

Position	Name of Organization
Managing Member	East Capitol Venture, LLC
Member	Delaney Charitable Foundation

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

- Wells Fargo - Brokerage #2 (Owner: JT)
- JKD 09 LLC (Owner: SP)
LOCATION: US
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 (25% Interest) (Owner: DC)
- Wells Fargo - Roth IRA (Owner: SP)
- DC Insurance Trust (Owner: DC)
- Cloister Cottage Venture, LLC (50% Interest) (Owner: SP)
LOCATION: US
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Charles Schwab - Brokerage #1 (Owner: DC)
- J.P. Morgan - Brokerage (Owner: SP)
- 2015 Insurance Trust
- Cloister Cottage Venture, LLC (50% Interest)
LOCATION: US
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #1 ⇒ Wells Fargo - Brokerage #2 (Owner: DC)
- Wells Fargo - Roth IRA
- TLM Trust
- East Capitol Venture, LLC
LOCATION: US
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Wells Fargo - Brokerage #2 (Owner: DC)
- Mazara, LLC (Owner: SP)

LOCATION: US

- Parkglen, LLC (Owner: DC)
LOCATION: US
- EVR Investment, LLC (Owner: SP)
LOCATION: US
- AMD 09 LLC
LOCATION: US
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 (25% Interest) (Owner: DC)
- Wells Fargo - Brokerage #1 (Owner: JT)
- DC Insurance Trust ⇒ Pacific Life (Owner: DC)
- SBLG Family Investments, LLC (Owner: DC)
LOCATION: US
- Allstate, variable annuity (Owner: JT)
- Parkglen, LLC (Owner: DC)
LOCATION: US
- SBLG Family Investments, LLC ⇒ SBLG Delaney Family Trust FBO Dependent Child #2 ⇒ Charles Schwab - Brokerage #1 (Owner: DC)

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. April McClain Delaney , 09/08/2026