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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Daniel Goldman
Status: Member
State/District: NY10

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Daniel Goldman 12/9/2011 Trust ⇒ 12 West Capital Fund LP [HE]		\$500,001 - \$1,000,000	Partnership Income	\$201 - \$1,000	☐
Daniel Goldman 12/9/2011 Trust ⇒ Cypress Point Technology Fund LP [HE]		\$250,001 - \$500,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman 12/9/2011 Trust ⇒ Exchange Place (Equity Only) All Cap LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$50,001 - \$100,000	☐
Daniel Goldman 12/9/2011 Trust ⇒ Gilder Gagnon Howe & Co, (J.D.) [HE]		\$5,000,001 - \$25,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	☐
Daniel Goldman 12/9/2011 Trust ⇒ Goldman Sachs Bank USA Deposit [BA]		\$1,001 - \$15,000	None		☐
Daniel Goldman 12/9/2011 Trust ⇒ Jottshots! [HE]		\$500,001 - \$1,000,000	None		☐
Daniel Goldman 12/9/2011 Trust ⇒ Schwab - Money Market Fund [BA]		\$1 - \$1,000	None		☐
Daniel Goldman 1997 Trust ⇒ Avantor, Inc. (AVTR) [ST]		\$1,001 - \$15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Daniel Goldman 1997 Trust ⇒ Financial Square Government Fund FST Shares (FGTXX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
Daniel Goldman 1997 Trust ⇒ Monte Vista Opportunity Fund I LP [HE]		\$1,000,001 - \$5,000,000	None		☐
Daniel Goldman 1997 Trust ⇒ Monte Vista Real Estate Fund I LLC [HE]		\$100,001 - \$250,000	None		☐
Daniel Goldman 1997 Trust ⇒ Northern Trust - Money Market [BA]		\$1,001 - \$15,000	None		☐
Daniel Goldman 1997 Trust ⇒ Presidio NCD III LP [HE]		\$15,001 - \$50,000	Partnership Income	\$201 - \$1,000	☐
Daniel Goldman 1997 Trust ⇒ Presidio Northgate PEP II LP [HE]		\$15,001 - \$50,000	None		☐
Daniel Goldman 1997 Trust ⇒ Stevenson Street H.I.G. II LP [HE]		\$15,001 - \$50,000	None		☐
Daniel Goldman 1997 Trust ⇒ Taboola.com Ltd. - Ordinary Shares (TBLA) [ST]		\$1,001 - \$15,000	None		☐
DESCRIPTION: Shares distributed from Monte Vista Opportunity Fund I LP					
Daniel Goldman 1997 Trust ⇒ Vantagepoint Venture Ptrs IV, LP [HE]		None	None		☐
DESCRIPTION: Sale less than \$1,000					
Daniel Goldman 1997 Trust ⇒ Village Roadshow Entertainment Group [PS]		None	None		☐
DESCRIPTION: Entity dissolved					
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Absolute Return (QP), LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Absolute Return Long Duration III, LP [HE]		\$500,001 - \$1,000,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒		\$500,001 - \$1,000,000	Partnership Income	\$50,001 - \$100,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
BBR Absolute Return Long Duration IV, LP [HE]					
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR ALO Fund, LLC [HE]		\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Equity Long/Short (QP), LP [HE]		\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Private Investment Fund-Series I, LP [HE]		\$500,001 - \$1,000,000	Partnership Income	\$5,001 - \$15,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Private Investment Fund-Series K, LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Private Investment Fund-Series L, LP [HE]		\$500,001 - \$1,000,000	Partnership Income	\$5,001 - \$15,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Real Assets Fund II, LP [HE]		\$250,001 - \$500,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Real Assets Fund III, LP [HE]		\$250,001 - \$500,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Real Assets Fund IV, LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Real Assets Fund VI LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Real Assets Fund VII, LP [HE]		\$500,001 - \$1,000,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ Brokerage ⇒ EXCHANGE PLACE (EQUITY ONLY): ALL CAP LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ Brokerage ⇒ GOLDMAN SACHS BANK USA DEPOSIT [BA]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ Brokerage ⇒ S&P Global Inc. (SPGI) [ST]		None	Capital Gains	\$15,001 - \$50,000	☒
Daniel Goldman Grandchildren 1986 Tru ⇒ Goldman 1986 TR Exchange Place ⇒ Exchange Place (Equity Only): All Cap LP [HE]		Over \$50,000,000	Partnership Income	\$1,000,001 - \$5,000,000	☐
Daniel Goldman Grandchildren 1986 Tru ⇒ Special Holdings (Trust SA) ⇒ Levi Strauss & Co Class A (LEVI) [ST]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ BAIN CAPITAL SENIOR LOAN SELECT LLCCLASS A SERIES 1 [OT] DESCRIPTION: Mutual Fund		\$1,000,001 - \$5,000,000	Dividends	\$1,001 - \$2,500	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		\$5,000,001 - \$25,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs GQG Partners International Opportunities Fund Class P Shares (GGIPX) [MF] DESCRIPTION: Capital gains distribution		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs Municipal Income Fund Institutional Shares (GSMTX) [MF]		None	Dividends	\$100,001 - \$1,000,000	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs Short Duration Tax Free Fund Institutional Shares (GSDUX) [MF]		\$5,000,001 - \$25,000,000	Dividends	\$100,001 - \$1,000,000	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Patient Square Equity Partners Access LLC [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ REDBIRD CAPITAL PARTNERS IV AC [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Tiger Global Crossover Access LLC [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ VINTAGE IX B/VINTAGE REAL ESTATE PARTNERS III ACCESS LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ Master Income ⇒ Financial Square Government Fund FST Shares (FGTXX) [MF] DESCRIPTION: Money Market Fund		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ Master Income ⇒ Goldman Sachs - Cash [BA]		\$15,001 - \$50,000	None		☐
Daniel Goldman Grandchildren 1986 Trust ⇒ MP ⇒ Financial Square Government Fund FST Shares (FGTXX) [MF]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ Non-US EQ ⇒ Artisan: Dynamic Equity (Non-US Equity) [Series] [OT] DESCRIPTION: EIF - Pooled Investment Fund		None	Partnership Income	\$100,001 - \$1,000,000	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ BELGARD CAPITAL FUND LLC CLASS II [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ CARLYLE GLOBAL INFRASTRUCTURE OPPORTUNITY FUND [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ CHARLES RIVER REALTY FUND II L P [HE]		\$250,001 - \$500,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒		\$500,001 - \$1,000,000	Partnership Income	\$1,001 - \$2,500	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DOVER STREET X LLC [HE]					
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA INTERNATIONAL PARTNERS, L.P. [HE]		\$1,001 - \$15,000	None		☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA PRIVATE EQUITY III, L.P. [HE]		\$1,001 - \$15,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA PRIVATE EQUITY VIII, L.P. [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA VENTURE CAPITAL IX, L.P. [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA VENTURE CAPITAL VIII, L.P. [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA VENTURE CAPITAL X, L.P. [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA VENTURE CAPITAL XII, LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$50,001 - \$100,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ LUXOR CAPITAL PARTNERS LIQUIDATING SPV, LLC [HE]		\$15,001 - \$50,000	Partnership Income	\$2,501 - \$5,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ LUXOR CAPITAL PARTNERS, LP [HE]		\$15,001 - \$50,000	None		☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ STEPSTONE VC GLOBAL PARTNERS VIII-B, L.P. [HE]		\$500,001 - \$1,000,000	Partnership Income	\$15,001 - \$50,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ Stepstone VC Opportunities VI, L.P. [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ UNICORN PARTNERS FUND III, LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$5,001 - \$15,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ WAVE EQUITY FUND II LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Affiliated Managers Group, Inc. (AMG) [ST]	SP	\$1,001 - \$15,000	None		☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Allegion plc Ordinary Shares (ALLE) [ST]	SP	\$1,001 - \$15,000	None		☐
E*Trade (Morgan Stanley) - Brokerage ⇒ American International Group, Inc. New Common Stock (AIG) [ST] DESCRIPTION: Appreciated over \$1,000	SP	\$1,001 - \$15,000	None		☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Bank of America Corporation (BAC) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Citigroup, Inc. (C) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Energy Transfer LP Common Units (ET) [ST]	SP	\$1,001 - \$15,000	None		☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Ingersoll Rand Inc. (IR) [ST]	SP	\$1,001 - \$15,000	None		☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Meta Platforms, Inc. - Class A (META) [ST]	SP	\$15,001 - \$50,000	None		☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Mondelez International, Inc. - Class A (MDLZ) [ST]	SP	\$1,001 - \$15,000	None		☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Morgan Stanley (MS) [ST]	SP	\$1,001 - \$15,000	None		☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Morgan Stanley Bank NA [BA]	SP	\$15,001 - \$50,000	None		☐
E*Trade (Morgan Stanley) - Brokerage ⇒	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
The Hershey Company (HSY) [ST]					
E*Trade (Morgan Stanley) - Brokerage ⇒ Trane Technologies plc (TT) [ST]	SP	\$15,001 - \$50,000	None		☐
E*Trade (Morgan Stanley) - Brokerage ⇒ Walmart Inc. (WMT) [ST]	SP	\$1,001 - \$15,000	None		☐
Fidelity - Winston & Strawn LLP - 401k ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		☐
JPM IRA ⇒ The AB Portfolios - AB Balanced Wealth Strategy - Class A (ABWAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Trust #1 ⇒ Schwab Brokerage ⇒ BBR ALO Fund, LLC [HE]	DC	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
Trust #1 ⇒ Schwab Brokerage ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Trust #1 ⇒ Schwab Brokerage ⇒ Fidelity Japan Fund (FJPNX) [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
DESCRIPTION: Capital gains distribution					
Trust #1 ⇒ Schwab Brokerage ⇒ Morgan Stanley Institutional Fund - Asia Opportunity Portfolio Class I (MSAQX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Trust #1 ⇒ Schwab Brokerage ⇒ Schwab-Cash [BA]	DC	\$1,001 - \$15,000	None		☐
Trust #1 ⇒ Schwab Brokerage ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
Trust #1 ⇒ Schwab Brokerage ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Trust #1 ⇒ Schwab Brokerage ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]	DC	\$1,001 - \$15,000	None		☐
Trust #2 ⇒ Schwab Brokerage ⇒	DC	\$50,001 -	Dividends	\$5,001 -	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
BBR ALO Fund, LLC [HE]		\$100,000		\$15,000	☐
Trust #2 ⇒ Schwab Brokerage ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Trust #2 ⇒ Schwab Brokerage ⇒ Fidelity Japan Fund (FJPNX) [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
DESCRIPTION: Capital gains distribution					
Trust #2 ⇒ Schwab Brokerage ⇒ Morgan Stanley Institutional Fund - Asia Opportunity Portfolio Class I (MSAQX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Trust #2 ⇒ Schwab Brokerage ⇒ Schwab-Cash [BA]	DC	\$1,001 - \$15,000	None		☐
Trust #2 ⇒ Schwab Brokerage ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
Trust #2 ⇒ Schwab Brokerage ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Trust #2 ⇒ Schwab Brokerage ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]	DC	\$1,001 - \$15,000	None		☐
Trust #3 ⇒ Schwab Brokerage ⇒ BBR ALO Fund, LLC [HE]	DC	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
Trust #3 ⇒ Schwab Brokerage ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Trust #3 ⇒ Schwab Brokerage ⇒ Fidelity Japan Fund (FJPNX) [MF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
DESCRIPTION: Capital gains distribution					
Trust #3 ⇒ Schwab Brokerage ⇒ Morgan Stanley Institutional Fund - Asia Opportunity Portfolio Class I (MSAQX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Trust #3 ⇒ Schwab Brokerage ⇒ Schwab-Cash [BA]	DC	\$1,001 - \$15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Trust #3 ⇒ Schwab Brokerage ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
Trust #3 ⇒ Schwab Brokerage ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Trust #3 ⇒ Schwab Brokerage ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Trust #4 ⇒ Schwab Brokerage ⇒ BBR ALO Fund, LLC [HE]	DC	\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	☐
Trust #4 ⇒ Schwab Brokerage ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
Trust #4 ⇒ Schwab Brokerage ⇒ Fidelity Japan Fund (FJPNX) [MF]	DC	\$1,001 - \$15,000	None		☐
Trust #4 ⇒ Schwab Brokerage ⇒ Morgan Stanley Institutional Fund - Asia Opportunity Portfolio Class I (MSAQX) [MF]	DC	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	☒
Trust #4 ⇒ Schwab Brokerage ⇒ Schwab-Cash [BA]	DC	\$1,001 - \$15,000	None		☐
Trust #4 ⇒ Schwab Brokerage ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	☐
Trust #4 ⇒ Schwab Brokerage ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Trust #4 ⇒ Schwab Brokerage ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐

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

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ Brokerage ⇒ S&P Global Inc. Common Stock (SPGI) [ST]		02/11/2025	S	\$15,001 - \$50,000	☒
Trust #4 ⇒ Schwab Brokerage ⇒ Morgan Stanley Institutional Fund - Asia Opportunity Portfolio Class I (MSAQX) [MF]	DC	12/16/2025	P	\$1,001 - \$15,000	
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ BAIN CAPITAL SENIOR LOAN SELECT LLC CLASS A SERIES 1 [OT] LOCATION: US DESCRIPTION: Mutual fund		06/01/2025	S (partial)	\$100,001 - \$250,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ BAIN CAPITAL SENIOR LOAN SELECT LLC CLASS A SERIES 1 [OT] LOCATION: US DESCRIPTION: Mutual fund		03/01/2025	S (partial)	\$500,001 - \$1,000,000	☐
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		01/07/2025	S (partial)	\$500,001 - \$1,000,000	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		05/05/2025	S (partial)	\$500,001 - \$1,000,000	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		08/12/2025	S (partial)	\$1,000,001 - \$5,000,000	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		04/15/2025	S (partial)	\$500,001 - \$1,000,000	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒		12/04/2025	S	\$5,000,001 - \$25,000,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Goldman Sachs Municipal Income Fund Institutional Shares (GSMTX) [MF]					
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs Short Duration Tax Free Fund Institutional Shares (GSDUX) [MF]		12/04/2025	P	\$5,000,001 - \$25,000,000	
Daniel Goldman Grandchildren 1986 Trust ⇒ Non-US EQ ⇒ Artisan: Dynamic Equity (Non-US Equity) [Series] [OT] LOCATION: US DESCRIPTION: EIF - Pooled Investment Fund		08/29/2025	S (partial)	\$100,001 - \$250,000	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ Non-US EQ ⇒ Artisan: Dynamic Equity (Non-US Equity) [Series] [OT] LOCATION: US DESCRIPTION: EIF - Pooled Investment Fund		01/31/2025	S (partial)	\$500,001 - \$1,000,000	☒
Daniel Goldman Grandchildren 1986 Trust ⇒ Non-US EQ ⇒ Artisan: Dynamic Equity (Non-US Equity) [Series] [OT] LOCATION: US DESCRIPTION: EIF - Pooled Investment Fund		08/31/2025	S	\$1,000,001 - \$5,000,000	☒

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SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Goldman Sachs	July 2022	Mortgage on personal residence in New York, NY	\$5,000,001 - \$25,000,000
	COMMENTS: Date incurred reported as August 2022 on previous reports.			
	Northern Trust	December 2020	Mortgage on personal residence in Atlantic Beach, NY	\$1,000,001 - \$5,000,000
	COMMENTS: Date incurred reported as November 2021 on previous reports.			
	Northern Trust	December 2020	Mortgage on personal residence in Water Mill, NY	\$5,000,001 - \$25,000,000
	COMMENTS: Date incurred reported as November 2021 on previous reports.			

Goldman Sachs	December 2021	Bank Line of Credit	\$25,000,001 - \$50,000,000
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SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors, Officer	Richard W. Goldman Family 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

◦ Trust #3 (Owner: DC) ◦ Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings LOCATION: US ◦ Trust #4 ⇒ Schwab Brokerage (Owner: DC) LOCATION: US ◦ Trust #2 (Owner: DC) ◦ Trust #4 (Owner: DC) ◦ Daniel Goldman Grandchildren 1986 Trust ⇒ Non-US EQ LOCATION: US ◦ Trust #3 ⇒ Schwab Brokerage (Owner: DC) LOCATION: US ◦ Daniel Goldman 12/9/2011 Trust ◦ Trust #2 ⇒ Schwab Brokerage (Owner: DC) LOCATION: US ◦ Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments LOCATION: US ◦ Trust #1 (Owner: DC) ◦ Fidelity - Winston & Strawn LLP - 401k (Owner: SP)
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- Daniel Goldman 1997 Trust
- E*Trade (Morgan Stanley) - Brokerage (Owner: SP)
- Daniel Goldman Grandchildren 1986 Tru ⇒ Goldman 1986 TR Exchange Place
- Daniel Goldman Grandchildren 1986 Trust ⇒ MP
LOCATION: US
- Daniel Goldman Grandchildren 1986 Tru
- Trust #1 ⇒ Schwab Brokerage (Owner: DC)
LOCATION: US
- Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ Brokerage
LOCATION: US
- Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory
LOCATION: US
- Daniel Goldman Grandchildren 1986 Trust
- JPM IRA (Owner: SP)
- Daniel Goldman Grandchildren 1986 Tru ⇒ Special Holdings (Trust SA)
LOCATION: US
- Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC
LOCATION: US
- Daniel Goldman Grandchildren 1986 Trust ⇒ Master Income
LOCATION: US

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. Daniel Goldman , 08/13/2026