



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. David J. Taylor  
**Status:** Member  
**State/District:** OH02

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2025  
**Filing Date:** 05/15/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Dave's IRA @ Schwab (Abundance) ⇒ AMG River Road Small Cap Value Fund - Class I (ARSIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Artisan Global Value Fund Advisor Shares (APDGX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Columbia Total Return Bond Fund Class R (CIBRX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Grandeur Peak Global Reach Fund, Institutional Class (GPRIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Invesco S&P 500 Equal Weight Financial ETF (RSPF) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Dave's IRA @ Schwab (Abundance) ⇒ New Perspective Fund - Class F-3 (FNPFXX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ PGIM Jennison Health Sciences Fund Class Z (PHSZX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ VanEck Morningstar Wide Moat ETF (MOAT) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Vanguard Total International Stock ETF (VXUS) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ WisdomTree Global High Dividend Fund (DEW) [EF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Appell Pete Corp (APPL) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ AT&T Inc. (T) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Chevron Corporation Common Stock (CVX) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒		\$15,001 - \$50,000	Capital Gains,	\$2,501 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Eli Lilly and Company Common Stock (LLY) [ST]			Dividends	\$5,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco Pharmaceuticals ETF (PJP) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Kroger Company (KR) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Dave's IRA @ Schwab (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Visa Inc. (V) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ 5/3 Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ First State Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ J.P. Morgan Chase bank Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ OPERS [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
David Taylor Trust ⇒ Rental Property [RP]  LOCATION: Cincinnati, OH, US		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ AT&T Inc. (T) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Chevron Corporation Common Stock (CVX) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Invesco Pharmaceuticals ETF (PJP) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]					<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Kroger Company (KR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ The J.M. Smucker Company Common Stock (SJM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Visa Inc. (V) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ AGCO Corporation Common Stock (AGCO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ American Financial Group, Inc. Common Stock (AFG) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Chevron Corporation Common Stock (CVX) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ DTE Energy Company Common Stock (DTE) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Globe Life Inc. Common Stock (GL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ NiSource Inc Common Stock (NI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Northrop Grumman Corporation Common Stock (NOC) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ PPG Industries, Inc. Common Stock (PPG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ State Street Energy Select Sector SPDR ETF (XLE) [EF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Timken Company (TKR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

\* 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?
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		08/14/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown)		02/20/2025	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
⇒ Kroger Company (KR) [ST]					
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		03/27/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		05/14/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ AT&T Inc. (T) [ST]		10/30/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		11/03/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		11/11/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]		08/07/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		11/11/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		03/10/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		03/10/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		08/07/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown)		03/10/2025	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]					
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		11/03/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		02/05/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		02/10/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		06/25/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		06/24/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		08/07/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		08/07/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Visa Inc. (V) [ST]		08/13/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ The J.M. Smucker Company Common Stock (SJM) [ST]		02/11/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		05/15/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒		09/22/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Procter & Gamble Company (PG) [ST]					
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ AT&T Inc. (T) [ST]		07/18/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Kroger Company (KR) [ST]		09/22/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		05/12/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		09/09/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		06/25/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		09/09/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		06/11/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		09/09/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Visa Inc. (V) [ST]		11/12/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		11/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		07/18/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		03/10/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		12/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		05/12/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		06/11/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		01/30/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Visa Inc. (V) [ST]		01/30/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		10/30/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		09/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		09/22/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		09/09/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		07/18/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ AT&T Inc. (T) [ST]		03/10/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		08/07/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		11/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		05/14/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ The J.M. Smucker Company Common Stock (SJM) [ST]		02/20/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		08/14/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]		03/27/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		02/25/2025	P	\$15,001 - \$50,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Dave's IRA @ Schwab (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Visa Inc. (V) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ AT&T Inc. (T) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		08/14/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒		02/25/2025	P	\$15,001 - \$50,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Progressive Corporation (PGR) [ST]					
Dave's IRA @ Schwab (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Chevron Corporation Common Stock (CVX) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Kroger Company (KR) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		03/27/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Medpace Holdings, Inc. - Common Stock (MEDP) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		05/14/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		12/10/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ AT&T Inc. (T) [ST]		10/30/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒		11/03/2025	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Progressive Corporation (PGR) [ST]					
Dave's IRA @ Schwab (Home Grown) ⇒ Visa Inc. (V) [ST]		12/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]		09/09/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		12/10/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		11/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Kroger Company (KR) [ST]		09/16/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		09/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		08/14/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		03/10/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		08/13/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		08/13/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒		08/13/2025	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Visa Inc. (V) [ST]					
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ AT&T Inc. (T) [ST]		07/18/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		09/22/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		07/18/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		08/14/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		09/09/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		09/22/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Chevron Corporation Common Stock (CVX) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		06/11/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		03/10/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒		05/14/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fifth Third Bancorp - Common Stock (FITB) [ST]					
Dave's IRA @ Schwab (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Kroger Company (KR) [ST]		09/22/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Medpace Holdings, Inc. - Common Stock (MEDP) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		07/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ AT&T Inc. (T) [ST]		03/10/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		07/18/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		11/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Kroger Company (KR) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dave's IRA @ Schwab (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		12/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Medpace Holdings, Inc. - Common Stock (MEDP) [ST]		07/23/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		06/11/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		05/12/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		10/30/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		09/09/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		09/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		06/24/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		09/22/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		12/10/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		08/13/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dave's IRA @ Schwab (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		11/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		05/14/2025	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]		03/27/2025	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		08/14/2025	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco Pharmaceuticals ETF (PJP) [EF]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco Pharmaceuticals ETF (PJP) [EF]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		05/14/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		03/04/2025	P	\$100,001 - \$250,000	
Dave's IRA @ Schwab (Abundance) ⇒ New Perspective Fund - Class F-3 (FNPFX) [MF]		03/04/2025	P	\$50,001 - \$100,000	
Dave's IRA @ Schwab (Abundance) ⇒ Artisan Global Value Fund Advisor Shares (APDGX) [MF]		03/04/2025	P	\$50,001 - \$100,000	
Dave's IRA @ Schwab (Abundance) ⇒ Grandeur Peak Global Reach Fund, Institutional Class (GPRIX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒		03/04/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]					
Dave's IRA @ Schwab (Abundance) ⇒ AMG River Road Small Cap Value Fund - Class I (ARSIX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Evolutionary Tree Innovators Fund - I Class Shares (INVNX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ PGIM Jennison Health Sciences Fund Class Z (PHSZX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		10/03/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		12/30/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Abundance) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		03/18/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Abundance) ⇒ Evolutionary Tree Innovators Fund - Class A (INVTX) [MF]		10/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Abundance) ⇒ New Perspective Fund - Class F-3 (FNPFXX) [MF]		06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		04/14/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		10/03/2026	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ AMG River Road Small Cap Value Fund - Class I (ARSIX) [MF]		10/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ PGIM Jennison Health Sciences Fund Class Z (PHSZX) [MF]		10/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dave's IRA @ Schwab (Abundance) ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		10/03/2025	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Grandeur Peak Global Reach Fund, Institutional Class (GPRIX) [MF]		10/03/2025	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Dave's IRA @ Schwab (Abundance) ⇒ Vanguard Total International Stock ETF (VXUS) [EF]		03/04/2025	P	\$50,001 - \$100,000	
Dave's IRA @ Schwab (Abundance) ⇒ WisdomTree Global High Dividend Fund (DEW) [EF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ VanEck Morningstar Wide Moat ETF (MOAT) [EF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Invesco S&P 500 Equal Weight Financial ETF (RSPF) [EF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Vanguard Total International Stock ETF (VXUS) [EF]		10/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Abundance) ⇒ WisdomTree Global High Dividend Fund (DEW) [EF]		10/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Abundance) ⇒ Invesco S&P 500 Equal Weight Financial ETF (RSPF) [EF]		10/03/2025	P	\$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
Sardinia Ready Mix, Inc.	Spouse Salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	First State bank, Winchester, Ohio	May 2020	Mortgage on rental property, Cincinnati, Ohio	\$100,001 - \$250,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Sardinia Ready Mix, Inc.
Trustee	David Taylor Trust

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 1995	Myself and the State of Ohio	Continued participation in pension plan

## 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

- David Taylor Trust
- Dave's IRA @ Schwab (Home Grown)
- Dave's IRA @ Schwab (Abundance)
- David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown)
- David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed)

## 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. David J. Taylor , 05/15/2026