



Filing ID #10075774

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Mary Gay Scanlon
Status: Member
State/District: PA05

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 05/07/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ballard Spahr LLP Pension [PE]	SP	Undetermined	None		☐
Gouverneur Savings and Loan [BA]	SP	\$1,001 - \$15,000	None		☐
DESCRIPTION: Money Market & Checking Account					
Gouverneur Savings and Loan [BA]	JT	\$1,001 - \$15,000	None		☐
DESCRIPTION: Money Market & Checking					
Northwestern Mutual - Adjustable CompLife [WU]	SP	\$100,001 - \$250,000	None		☐
DESCRIPTION: Policy date 5/30/2019					
Northwestern Mutual - Adjustable CompLife [WU]	SP	\$50,001 - \$100,000	None		☐
DESCRIPTION: Policy date 10/13/1992					
Northwestern Mutual - Estate CompLife [WU]	SP	\$15,001 - \$50,000	None		☐
DESCRIPTION: Policy date 10/23/2014					
Northwestern Mutual - Estate CompLife [WU]	SP	\$15,001 - \$50,000	None		☐
DESCRIPTION: Policy date 10/23/2013					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual - Estate CompLife [WU] DESCRIPTION: Policy date 10/23/2011	SP	\$50,001 - \$100,000	None		☐
Northwestern Mutual - Estate CompLife [WU] DESCRIPTION: Policy date 10/23/2007	SP	\$50,001 - \$100,000	None		☐
Northwestern Mutual - Whole Life [WU] DESCRIPTION: Policy date 1/23/2013		\$15,001 - \$50,000	None		☐
Northwestern Mutual - Whole Life [WU] DESCRIPTION: Policy date 10/14/1993		\$50,001 - \$100,000	None		☐
Northwestern Mutual - Whole Life [WU] DESCRIPTION: Policy date 10/13/1992		\$50,001 - \$100,000	None		☐
Northwestern Mutual - Whole Life [WU] DESCRIPTION: Policy date 10/23/2012	SP	\$50,001 - \$100,000	None		☐
Northwestern Mutual - Whole Life [WU] DESCRIPTION: Policy date 10/23/2004	SP	\$15,001 - \$50,000	None		☐
Northwestern Mutual - Whole Life [WU] DESCRIPTION: Policy date 10/23/2002	SP	\$15,001 - \$50,000	None		☐
Northwestern Mutual - Whole Life [WU] DESCRIPTION: Policy date 10/23/2000	SP	\$50,001 - \$100,000	None		☐
Northwestern Mutual - Whole Life [WU] DESCRIPTION: Policy date 10/23/1998	SP	\$50,001 - \$100,000	None		☐
Pennsylvania State Employee Credit Union [BA]		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	☐
PNC Bank [BA] DESCRIPTION: Checking, Money Market, and Certificate of Deposits.	SP	\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Residential property located in Chaumont, NY [RP] LOCATION: Chaumont, NY, US	JT	\$100,001 - \$250,000	None		☐
27128 Independence Point LLC ⇒ Gouverneur Savings and Loan [BA]		\$1,001 - \$15,000	None		☐
27128 Independence Point LLC ⇒ Rental Property [RP] LOCATION: Chaumont, NY, US		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	☒
Annuity ⇒ Northwestern Mutual Annuity (1) [FN]	JT	\$500,001 - \$1,000,000	None		☐
Annuity ⇒ Northwestern Mutual Annuity (2) [FN]	JT	\$250,001 - \$500,000	None		☐
Ballard 401K ⇒ Fiam Core Plus Class F [OT] DESCRIPTION: Mutual Fund	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Ballard 401K ⇒ Fidelity Managed Income Portfolio II - Class 2 [OT] DESCRIPTION: Mutual Fund	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Ballard 401K ⇒ Vanguard Bond Index Fund Total Bond Mkt Index Fund Institutional Share (VBTIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Ballard 401K ⇒ Vanguard Index Trust Mid-Cap Index Fund Institutional Shares (VMCIX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		☐
Ballard 401K ⇒ Vanguard Index Trust Small-Cap Index Fund Instl Shares (VSCIX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		☐
Ballard 401K ⇒ Vanguard Institutional Index (VINIX) [MF]	SP	\$1,000,001 - \$5,000,000	Tax-Deferred		☐
Ballard 401K ⇒ Vanguard Total International Stock Index Fund Institutional Shares (VTSNX) [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brokerage #1 ⇒ Federated Hermes Municipal Obligations Fund Wealth Shares (MOFXX) [MF] DESCRIPTION: Money Market Fund	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☐
Brokerage #1 ⇒ Vanguard Wellington Income Fund (VWELX) [MF] DESCRIPTION: Capital gain distribution	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Brokerage #2 ⇒ NM FDIC Insured Deposit Program [BA]	JT	\$15,001 - \$50,000	Interest	\$2,501 - \$5,000	☐
Brokerage #2 ⇒ Tax-Exempt Bond Fund Class S (RLVSX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	☒
Brokerage #2 ⇒ Tax-Exempt High Yield Bond Fund Class S (RTHSX) [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☒
Brokerage #2 ⇒ Tax-Managed International Equity Fund Class S (RTNSX) [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☒
Brokerage #2 ⇒ Tax-Managed Real Assets Fund Class S (RTXSX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Brokerage #2 ⇒ Tax-Managed U.S. Large Cap Fund Class S (RETSX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	☒
Brokerage #2 ⇒ Tax-Managed U.S. Mid & Small Cap Fund Class S (RTSSX) [MF]	JT	\$15,001 - \$50,000	None		☒
Northwestern Mutual Insurance ⇒ Global Real Estate Securities (RIF) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Northwestern Mutual Insurance ⇒ Index 400 Stock (MSA/Northern Trust) [MF] DESCRIPTION: Variable CompLife	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Northwestern Mutual Insurance ⇒ Index 500 Stock (MSA/BlackRock) [OT] DESCRIPTION: Mutual Fund; Variable CompLife	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
Northwestern Mutual Insurance ⇒ Index 600 Stock (MSA/Northern Trust) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Variable CompLife					
Northwestern Mutual Insurance ⇒ International Equity (MSA/Dodge Cox) [MF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
DESCRIPTION: Variable CompLife					
Northwestern Mutual IRA # 2 ⇒ Cohen & Steers Real Estate Securities Fund, Inc. Class I (CSDIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ Columbia Overseas Value Fund Class I (COSZX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
DESCRIPTION: Purchase less than \$1,000					
Northwestern Mutual IRA # 2 ⇒ Column Mid Cap Select Fund (CFMSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ Column Small Cap Select Fund (CFSSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
DESCRIPTION: 2024 purchases less than \$1,000					
Northwestern Mutual IRA # 2 ⇒ Dimensional International Value ETF (DFIV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
DESCRIPTION: Purchase less than \$1,000					
Northwestern Mutual IRA # 2 ⇒ FMI International Fund Institutional Class (FMIYX) [MF]	SP	None	Tax-Deferred		☐
DESCRIPTION: Full sale less than \$1,000					
Northwestern Mutual IRA # 2 ⇒ Goldman Sachs Equity Insights Fund Institutional Share (GCIIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Northwestern Mutual IRA # 2 ⇒ Goldman Sachs Intl Small Cap Insights Fd Inst (GICIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual IRA # 2 ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ iShares MSCI Eurozone ETF (EZU) [EF]	SP	None	Tax-Deferred		☒
Northwestern Mutual IRA # 2 ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Northwestern Mutual IRA # 2 ⇒ iShares MSCI USA Value Factor ETF (VLUE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ New World Fund, Inc., Class F-2 Shs (NFFFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ Northwestern Mutual Deposit Program [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ Oakmark Select Fund Advisor Class (OAYLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ PIMCO CommoditiesPLUS Strategy Fund Class I-2 (PCLPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ Schwab International Equity ETF (SCHF) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Northwestern Mutual IRA # 2 ⇒ Vanguard Emerging Markets Stock Index Fund ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA # 2 ⇒ Vanguard Total Bond Market ETF (BND) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Northwestern Mutual IRA #1 ⇒ AQR Diversified Arbitrage Fund Class I (ADAIX) [MF]		None	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ AQR Diversifying Strategies Fund Class I (QDSIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual IRA #1 ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ BlackRock Systematic Multi-Strategy Fund Institutional Class (BIMBX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ Column Mid Cap Fund (CFMCX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ Column Small Cap Fund (CFS LX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ Dodge & Cox Income Fund - Class I (DODIX) [MF]		\$100,001 - \$250,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ DWS Enhanced Commodity Strategy Fund - Class Institutional (SKIRX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Northwestern Mutual IRA #1 ⇒ EuroPacific Growth Fund, Class F-2 Shs (AEPFX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ Fidelity Advisor Emerging Markets Fund: Class I (FIMKX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Northwestern Mutual IRA #1 ⇒ Fidelity Advisor New Insights Fund: Class I (FINSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ Goldman Sachs ActiveBeta U.S. Large Cap Equity ETF (GSLC) [EF]		\$50,001 - \$100,000	Tax-Deferred		☐
Northwestern Mutual IRA #1 ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
Northwestern Mutual IRA #1 ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		\$50,001 - \$100,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ iShares MSCI Intl Value Factor ETF (IVLU) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
Northwestern Mutual IRA #1 ⇒		\$15,001 - \$50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares MSCI USA Value Factor ETF (VLUE) [EF]					☐
Northwestern Mutual IRA #1 ⇒ John Hancock Disciplined Value International Fund Class I (JDVIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ John Hancock Diversified Macro Fund Class I (JDJIX) [MF]		None	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ MFS Value Fund - Class I (MEIIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ New World Fund, Inc., Class F-2 Shs (NFFFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ Northwestern Mutual Deposit Program [BA]		\$15,001 - \$50,000	Tax-Deferred		☐
Northwestern Mutual IRA #1 ⇒ Nuveen Core Bond Fund I (TIBHX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
Northwestern Mutual IRA #1 ⇒ Oakmark International Fund Advisor Class (OAYIX) [MF]		None	Tax-Deferred		☒
Northwestern Mutual IRA #1 ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Northwestern Mutual IRA #1 ⇒ Principal Real Estate Securities Fund Inst (PIREX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Northwestern Mutual IRA #1 ⇒ The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
Northwestern Mutual Variable Annuity ⇒ Index 400 Stock (MSA/Northern Trust) [OT] DESCRIPTION: Mutual Fund	SP	\$1,001 - \$15,000	None		☐
Northwestern Mutual Variable Annuity ⇒ Index 500 Stock (MSA/BlackRock) [MF]	SP	\$1,001 - \$15,000	None		☐
Northwestern Mutual Variable Annuity ⇒ Index 600 Stock (MSA/Northern Trust) [MF]	SP	\$1,001 - \$15,000	None		☐
Northwestern Mutual Variable Annuity ⇒	SP	\$1,001 - \$15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
International Equity (MSA/Dodge Cox) [MF]					
Northwestern Mutual Variable Annuity ⇒ Russell Investment Global Real Estate Securities [OT]	SP	\$1,001 - \$15,000	None		☐
DESCRIPTION: Mutual Fund					
COMMENTS: Previously reported as Global Real Estate Securities					

* 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?
Brokerage #1 ⇒ Vanguard Wellington Income Fund (VWELX) [MF]	JT	12/24/2025	P	\$1,001 - \$15,000	
Brokerage #1 ⇒ Vanguard Wellington Income Fund (VWELX) [MF]	JT	12/24/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA # 2 ⇒ Goldman Sachs Equity Insights Fund Institutional Share (GCIIX) [MF]	SP	06/23/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA # 2 ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	04/28/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA # 2 ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	08/18/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA # 2 ⇒ iShares MSCI Eurozone ETF (EZU) [EF]	SP	04/28/2025	S	\$1,001 - \$15,000	☐
Northwestern Mutual IRA # 2 ⇒ Schwab International Equity ETF (SCHF) [EF]	SP	08/18/2025	S (partial)	\$1,001 - \$15,000	☐
Northwestern Mutual IRA #1 ⇒ AQR Diversified Arbitrage Fund Class I (ADAIX) [MF]		03/03/2025	S	\$15,001 - \$50,000	☐
Northwestern Mutual IRA #1 ⇒ AQR Diversifying Strategies Fund Class I (QDSIX) [MF]		03/03/2025	P	\$15,001 - \$50,000	
Northwestern Mutual IRA #1 ⇒ BlackRock Strategic Income Opportunities Portfolio -		04/28/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Institutional (BSIIX) [MF]					
Northwestern Mutual IRA #1 ⇒ BlackRock Systematic Multi-Strategy Fund Institutional Class (BIMBX) [MF]		04/28/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ Column Mid Cap Fund (CFMCX) [MF]		12/16/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ Column Small Cap Fund (CFS LX) [MF]		04/28/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ Column Small Cap Fund (CFS LX) [MF]		12/16/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ Dodge & Cox Income Fund - Class I (DODIX) [MF]		06/26/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ Dodge & Cox Income Fund - Class I (DODIX) [MF]		09/26/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ Dodge & Cox Income Fund - Class I (DODIX) [MF]		12/19/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ EuroPacific Growth Fund, Class F-2 Shs (AEPFX) [MF]		06/10/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ EuroPacific Growth Fund, Class F-2 Shs (AEPFX) [MF]		12/19/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ EuroPacific Growth Fund, Class F-2 Shs (AEPFX) [MF]		12/19/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ Fidelity Advisor New Insights Fund: Class I (FINSX) [MF]		04/28/2025	S (partial)	\$1,001 - \$15,000	☐
Northwestern Mutual IRA #1 ⇒ Fidelity Advisor New Insights Fund: Class I (FINSX) [MF]		12/08/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		03/13/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒		04/28/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares 20+ Year Treasury Bond ETF (TLT) [EF]					
Northwestern Mutual IRA #1 ⇒ John Hancock Diversified Macro Fund Class I (JDJIX) [MF]		03/03/2025	S	\$15,001 - \$50,000	☐
Northwestern Mutual IRA #1 ⇒ John Hancock Disciplined Value International Fund Class I (JDVIX) [MF]		03/03/2025	P	\$50,001 - \$100,000	
Northwestern Mutual IRA #1 ⇒ John Hancock Disciplined Value International Fund Class I (JDVIX) [MF]		12/22/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ John Hancock Disciplined Value International Fund Class I (JDVIX) [MF]		12/22/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ MFS Value Fund - Class I (MEIIX) [MF]		12/12/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ New World Fund, Inc., Class F-2 Shs (NFFFX) [MF]		12/19/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ Oakmark International Fund Advisor Class (OAYIX) [MF]		03/03/2025	S	\$50,001 - \$100,000	☐
Brokerage #2 ⇒ Tax-Managed U.S. Large Cap Fund Class S (RETSX) [MF]	JT	03/05/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Managed U.S. Large Cap Fund Class S (RETSX) [MF]	JT	04/04/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Managed U.S. Large Cap Fund Class S (RETSX) [MF]	JT	05/05/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Managed U.S. Large Cap Fund Class S (RETSX) [MF]	JT	06/04/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Managed U.S. Large Cap Fund Class S (RETSX) [MF]	JT	07/07/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Managed U.S. Large Cap Fund Class S (RETSX) [MF]	JT	08/04/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Brokerage #2 ⇒ Tax-Managed U.S. Large Cap Fund Class S (RETSX) [MF]	JT	12/18/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Exempt Bond Fund Class S (RLVSX) [MF]	JT	03/05/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Exempt Bond Fund Class S (RLVSX) [MF]	JT	04/04/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Exempt Bond Fund Class S (RLVSX) [MF]	JT	05/05/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Exempt Bond Fund Class S (RLVSX) [MF]	JT	06/04/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Exempt Bond Fund Class S (RLVSX) [MF]	JT	07/07/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Exempt Bond Fund Class S (RLVSX) [MF]	JT	08/04/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Exempt High Yield Bond Fund Class S (RTHSX) [MF]	JT	03/05/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Exempt High Yield Bond Fund Class S (RTHSX) [MF]	JT	04/04/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Exempt High Yield Bond Fund Class S (RTHSX) [MF]	JT	05/05/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Exempt High Yield Bond Fund Class S (RTHSX) [MF]	JT	06/04/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Exempt High Yield Bond Fund Class S (RTHSX) [MF]	JT	07/07/2025	P	\$1,001 - \$15,000	
Northwestern Mutual IRA #1 ⇒ Dodge & Cox Income Fund - Class I (DODIX) [MF]		03/27/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Exempt High Yield Bond Fund Class S (RTHSX) [MF]	JT	08/04/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒	JT	03/05/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Tax-Managed International Equity Fund Class S (RTNSX) [MF]					
Brokerage #2 ⇒ Tax-Managed International Equity Fund Class S (RTNSX) [MF]	JT	04/04/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Managed International Equity Fund Class S (RTNSX) [MF]	JT	05/05/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Managed International Equity Fund Class S (RTNSX) [MF]	JT	06/04/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Managed International Equity Fund Class S (RTNSX) [MF]	JT	07/07/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Managed International Equity Fund Class S (RTNSX) [MF]	JT	08/04/2025	P	\$15,001 - \$50,000	
Brokerage #2 ⇒ Tax-Managed International Equity Fund Class S (RTNSX) [MF]	JT	12/18/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Managed U.S. Mid & Small Cap Fund Class S (RTSSX) [MF]	JT	03/05/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Managed U.S. Mid & Small Cap Fund Class S (RTSSX) [MF]	JT	04/04/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Managed U.S. Mid & Small Cap Fund Class S (RTSSX) [MF]	JT	06/04/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Managed U.S. Mid & Small Cap Fund Class S (RTSSX) [MF]	JT	08/04/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Managed Real Assets Fund Class S (RTXSX) [MF]	JT	03/05/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Brokerage #2 ⇒ Tax-Managed Real Assets Fund Class S (RTXSX) [MF]	JT	05/05/2025	P	\$1,001 - \$15,000	
Brokerage #2 ⇒ Tax-Managed Real Assets Fund Class S (RTXSX) [MF]	JT	07/07/2025	P	\$1,001 - \$15,000	
27128 Independence Point LLC ⇒ Rental Property [RP] LOCATION: Chaumont, NY, US DESCRIPTION: Rental Real Estate		03/12/2025	P	\$250,001 - \$500,000	

* 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
Ballard Spahr LLP	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Mr. Cooper COMMENTS: Paid in full August 2025	January 2011	Residential Mortgage	\$15,001 - \$50,000
JT	Gouverneur Savings and Loan Association	September 2017	Mortgage on Chaumont, NY rental property	\$50,001 - \$100,000
JT	Capitol Hill Tower Housing Cooperative, Inc. COMMENTS: Previously reported as Caliber Home Loans, Inc. on CY 2023 and CY 2024 reports.	September 2022	Co-op building loan	\$100,001 - \$250,000
JT	Newrez LLC DBA Shellpoint Mortgage Servicing COMMENTS: Purchased Caliber Home Loans loan in 2023 (not Capitol Hill Tower Housing Cooperative, Inc. loan).	September 2022	Co-op building loan	\$100,001 - \$250,000
JT	Gouverneur Savings and Loan Association	March 2025	Mortgage on Chaumont, NY rental property	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Member	27128 Independence Point LLC

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Center Forward	06/14/2025	06/19/2025	Philadelphia, PA - London, United Kingdom - Philadelphia, PA	0	☒	☒	☒

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Northwestern Mutual IRA #1 - Northwestern Mutual IRA # 2 (Owner: SP) - Ballard 401K (Owner: SP) - Brokerage #1 (Owner: JT) - Annuity (Owner: JT) LOCATION: US - Northwestern Mutual Insurance (Owner: SP) - Northwestern Mutual Variable Annuity (Owner: SP) - Brokerage #2 (Owner: JT) 27128 Independence Point LLC 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. Mary Gay Scanlon , 05/07/2026