



Filing ID #10075867

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Pete Sessions  
**Status:** Member  
**State/District:** TX17

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2025  
**Filing Date:** 04/28/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset                                                                                              | Owner | Value of Asset       | Income Type(s) | Income          | Tx. > \$1,000?           |
|----------------------------------------------------------------------------------------------------|-------|----------------------|----------------|-----------------|--------------------------|
| Alphabet Inc. - Class C Capital Stock (GOOG) [ST]<br>DESCRIPTION: ET Invest                        |       | \$15,001 - \$50,000  | Dividends      | \$1 - \$200     | <input type="checkbox"/> |
| Amazon.com, Inc. (AMZN) [ST]<br>DESCRIPTION: CS Invest                                             |       | \$15,001 - \$50,000  | None           |                 | <input type="checkbox"/> |
| American Funds Investment Co of America Cl F-1 Shs (AICFX) [MF]<br>DESCRIPTION: ET Invest          |       | \$15,001 - \$50,000  | Dividends      | \$201 - \$1,000 | <input type="checkbox"/> |
| Berkshire Hathaway Inc. New (BRK.B) [ST]                                                           |       | \$15,001 - \$50,000  | None           |                 | <input type="checkbox"/> |
| BlackRock Utility, Infrastructure & Power Opportunities Trust (BUI) [ST]<br>DESCRIPTION: CS Invest |       | \$1,001 - \$15,000   | Dividends      | \$201 - \$1,000 | <input type="checkbox"/> |
| BWX Technologies, Inc. (BWXT) [ST]                                                                 |       | \$50,001 - \$100,000 | Dividends      | \$201 - \$1,000 | <input type="checkbox"/> |
| Exxon Mobil Corporation (XOM) [ST]                                                                 |       | \$1,001 - \$15,000   | Dividends      | \$1 - \$200     | <input type="checkbox"/> |

| Asset                                                  | Owner | Value of Asset        | Income Type(s)           | Income            | Tx. > \$1,000?                      |
|--------------------------------------------------------|-------|-----------------------|--------------------------|-------------------|-------------------------------------|
| INTRUST BANK CD WICHITA KS CD 4.30 DUE 07/01/2025 [BA] |       | None                  | Interest                 | \$201 - \$1,000   | <input type="checkbox"/>            |
| Lowe's Companies, Inc. (LOW) [ST]                      |       | \$15,001 - \$50,000   | Dividends                | \$201 - \$1,000   | <input type="checkbox"/>            |
| DESCRIPTION: CS Invest                                 |       |                       |                          |                   |                                     |
| Microsoft Corporation (MSFT) [ST]                      |       | \$50,001 - \$100,000  | Dividends                | \$201 - \$1,000   | <input type="checkbox"/>            |
| DESCRIPTION: ET Invest                                 |       |                       |                          |                   |                                     |
| New York Whole Life Insurance [WU]                     |       | \$50,001 - \$100,000  | Dividends                | \$1,001 - \$2,500 | <input type="checkbox"/>            |
| North American Whole Life Insurance [WU]               |       | \$100,001 - \$250,000 | Interest                 | \$2,501 - \$5,000 | <input type="checkbox"/>            |
| Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]  |       | \$15,001 - \$50,000   | Capital Gains, Dividends | \$201 - \$1,000   | <input checked="" type="checkbox"/> |
| Strategy Shares Nasdaq 7HANDL Index ETF (HNDL) [EF]    |       | None                  | Capital Gains            | \$201 - \$1,000   | <input checked="" type="checkbox"/> |
| Union Pacific Corporation (UNP) [ST]                   |       | \$15,001 - \$50,000   | Dividends                | \$201 - \$1,000   | <input type="checkbox"/>            |
| DESCRIPTION: ET Invest                                 |       |                       |                          |                   |                                     |
| US Bank #1 [BA]                                        | SP    | \$1,001 - \$15,000    | Interest                 | \$1 - \$200       | <input type="checkbox"/>            |
| US Bank #2 [BA]                                        |       | \$1,001 - \$15,000    | Interest                 | \$1 - \$200       | <input type="checkbox"/>            |
| US Bank #2 [BA]                                        |       | \$50,001 - \$100,000  | Interest                 | \$1,001 - \$2,500 | <input type="checkbox"/>            |
| US bank #2 [BA]                                        |       | \$50,001 - \$100,000  | Interest                 | \$1,001 - \$2,500 | <input type="checkbox"/>            |
| US Bank #3 [BA]                                        |       | \$1,001 - \$15,000    | Interest                 | \$1 - \$200       | <input type="checkbox"/>            |
| Verizon Communications Inc. Common Stock (VZ) [ST]     |       | \$1,001 - \$15,000    | Dividends                | \$201 - \$1,000   | <input type="checkbox"/>            |
| 529 1 ⇒ 529 1 [5P]                                     | SP    | \$50,001 - \$100,000  | Tax-Deferred             |                   | <input checked="" type="checkbox"/> |
| LOCATION: IA                                           |       |                       |                          |                   |                                     |

| Asset                                                                                           | Owner | Value of Asset        | Income Type(s) | Income      | Tx. > \$1,000?                      |
|-------------------------------------------------------------------------------------------------|-------|-----------------------|----------------|-------------|-------------------------------------|
| 529 1 ⇒<br>529 1 Florida Prepaid [5P]<br><br>LOCATION: FL                                       | SP    | \$1,001 - \$15,000    | Tax-Deferred   |             | <input checked="" type="checkbox"/> |
| 529 3 ⇒<br>529 3 [5P]<br><br>LOCATION: IA                                                       | SP    | \$50,001 - \$100,000  | Tax-Deferred   |             | <input checked="" type="checkbox"/> |
| CS SEP ⇒<br>American Century Select Investor Class (TWCIX) [MF]                                 |       | \$50,001 - \$100,000  | Tax-Deferred   |             | <input type="checkbox"/>            |
| CS SEP ⇒<br>Counterpoint Tactical Income Fund Class C (CPCTX) [MF]                              |       | \$100,001 - \$250,000 | Tax-Deferred   |             | <input type="checkbox"/>            |
| CS SEP ⇒<br>Invesco QQQ Trust, Series 1 (QQQ) [EF]                                              |       | \$15,001 - \$50,000   | Tax-Deferred   |             | <input type="checkbox"/>            |
| CS SEP ⇒<br>Love Field ARPT TX [CS]<br><br>DESCRIPTION: Bond                                    |       | \$1,001 - \$15,000    | Tax-Deferred   |             | <input type="checkbox"/>            |
| CS SEP ⇒<br>Schwab Fundamental U.S. Broad Market ETF (FNDB) [EF]                                |       | \$15,001 - \$50,000   | Tax-Deferred   |             | <input type="checkbox"/>            |
| CS SEP ⇒<br>Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]                               |       | \$1,001 - \$15,000    | Tax-Deferred   |             | <input checked="" type="checkbox"/> |
| CS SEP ⇒<br>Schwab Fundamental US Lg Company Index Fund Insti Shs (SFLNX) [MF]                  |       | \$50,001 - \$100,000  | Tax-Deferred   |             | <input type="checkbox"/>            |
| CS SEP ⇒<br>Schwab International Equity ETF (SCHF) [EF]                                         |       | \$15,001 - \$50,000   | Tax-Deferred   |             | <input checked="" type="checkbox"/> |
| CS SEP ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]                     |       | \$1,001 - \$15,000    | Interest       | \$1 - \$200 | <input type="checkbox"/>            |
| CS SEP ⇒<br>Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]<br><br>DESCRIPTION: CS Invest |       | \$100,001 - \$250,000 | Tax-Deferred   |             | <input type="checkbox"/>            |
| CS SEP ⇒<br>Schwab U.S. Large-Cap ETF (SCHX) [EF]                                               |       | \$1,001 - \$15,000    | Tax-Deferred   |             | <input checked="" type="checkbox"/> |

| Asset                                                      | Owner | Value of Asset        | Income Type(s) | Income | Tx. > \$1,000?                      |
|------------------------------------------------------------|-------|-----------------------|----------------|--------|-------------------------------------|
| CS SEP ⇒<br>Schwab US Dividend Equity ETF (SCHD) [EF]      |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| CS SEP ⇒<br>Schwab Value Advantage Money Fund (SWVXX) [MF] |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US Bank #1 [BA]                                |       | None                  | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US Bank #1 [BA]                                |       | \$100,001 - \$250,000 | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US bank #1 [BA]                                |       | \$100,001 - \$250,000 | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US bank #2 [BA]                                |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US Bank #2 [BA]                                |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US Bank #3 [BA]                                |       | None                  | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US bank #3 [BA]                                |       | \$50,001 - \$100,000  | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US Bank #5 [BA]                                |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US Bank #6 [BA]                                |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US bank #6 [BA]                                |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US bank #7 [BA]                                |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/>            |
| CS SEP ⇒<br>US Bank #7 [BA]                                |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/>            |

| Asset                                                                                                | Owner | Value of Asset        | Income Type(s)           | Income            | Tx. > \$1,000?                      |
|------------------------------------------------------------------------------------------------------|-------|-----------------------|--------------------------|-------------------|-------------------------------------|
| CS SEP ⇒<br>US Bank #8 [BA]                                                                          |       | \$15,001 - \$50,000   | Tax-Deferred             |                   | <input type="checkbox"/>            |
| CS SEP ⇒<br>US bank #8 [BA]                                                                          |       | \$15,001 - \$50,000   | Tax-Deferred             |                   | <input type="checkbox"/>            |
| CS SEP ⇒<br>Vanguard Information Tech ETF (VGT) [EF]                                                 |       | \$100,001 - \$250,000 | Tax-Deferred             |                   | <input checked="" type="checkbox"/> |
| CS SEP ⇒<br>Vanguard Mega Cap Value ETF (MGV) [EF]                                                   |       | \$50,001 - \$100,000  | Tax-Deferred             |                   | <input type="checkbox"/>            |
| ET Invest ⇒<br>Costco Wholesale Corporation - Common Stock (COST) [ST]                               |       | \$250,001 - \$500,000 | Dividends                | \$1,001 - \$2,500 | <input type="checkbox"/>            |
| ET Invest ⇒<br>CVS Health Corporation Common Stock (CVS) [ST]                                        |       | None                  | Capital Gains            | \$201 - \$1,000   | <input checked="" type="checkbox"/> |
| ET Invest ⇒<br>Fundamental Investors, Class F-1 Shares (AFIFX) [MF]                                  |       | \$50,001 - \$100,000  | Capital Gains, Dividends | \$201 - \$1,000   | <input type="checkbox"/>            |
| ET Invest ⇒<br>Home Depot, Inc. (HD) [ST]<br><br>DESCRIPTION: ET Invest                              |       | \$1,001 - \$15,000    | Dividends                | \$1 - \$200       | <input type="checkbox"/>            |
| ET Invest ⇒<br>RTX Corporation Common Stock (RTX) [ST]                                               |       | \$15,001 - \$50,000   | Capital Gains            | \$201 - \$1,000   | <input type="checkbox"/>            |
| ET Invest ⇒<br>Strategy Shares Nasdaq 7HANDL Index ETF (HNDL) [ST]<br><br>DESCRIPTION: ET Invest     |       | \$1,001 - \$15,000    | Dividends                | \$201 - \$1,000   | <input type="checkbox"/>            |
| ET Invest ⇒<br>US bank #1 [BA]                                                                       |       | None                  | Interest                 | \$201 - \$1,000   | <input type="checkbox"/>            |
| ET Invest ⇒<br>US Bank #1 [BA]                                                                       |       | None                  | Interest                 | \$201 - \$1,000   | <input type="checkbox"/>            |
| ET Invest ⇒<br>Vanguard Equity Income Fund Admiral Shares (VEIRX) [MF]<br><br>DESCRIPTION: ET Invest |       | \$50,001 - \$100,000  | Dividends                | \$1,001 - \$2,500 | <input type="checkbox"/>            |
| ET Invest ⇒                                                                                          |       | \$50,001 -            | Capital Gains,           | \$201 - \$1,000   | <input type="checkbox"/>            |

| Asset                                                                                | Owner | Value of Asset       | Income Type(s) | Income      | Tx. ><br>\$1,000?        |
|--------------------------------------------------------------------------------------|-------|----------------------|----------------|-------------|--------------------------|
| Vanguard Growth Index Fd Admiral Shs (VIGAX) [MF]                                    |       | \$100,000            | Dividends      |             | <input type="checkbox"/> |
| ET Invest ⇒<br>Victory Nasdaq-100 Index Fund Shares (USNQX) [MF]                     |       | \$15,001 - \$50,000  | Dividends      | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: ET Invest                                                               |       |                      |                |             |                          |
| ET IRA ⇒<br>AbbVie Inc. (ABBV) [ST]                                                  |       | \$15,001 - \$50,000  | Tax-Deferred   |             | <input type="checkbox"/> |
| ET IRA ⇒<br>BlackRock Utility, Infrastructure & Power Opportunities Trust (BUI) [ST] |       | \$1,001 - \$15,000   | Tax-Deferred   |             | <input type="checkbox"/> |
| ET IRA ⇒<br>Chevron Corporation (CVX) [ST]                                           |       | \$15,001 - \$50,000  | Tax-Deferred   |             | <input type="checkbox"/> |
| ET IRA ⇒<br>Crown Castle International Corp. (CCI) [ST]                              |       | \$1,001 - \$15,000   | Tax-Deferred   |             | <input type="checkbox"/> |
| ET IRA ⇒<br>Energy Transfer LP Common Units (ET) [ST]                                |       | \$1,001 - \$15,000   | Tax-Deferred   |             | <input type="checkbox"/> |
| ET IRA ⇒<br>Honeywell International Inc. (HON) [ST]                                  |       | \$15,001 - \$50,000  | Tax-Deferred   |             | <input type="checkbox"/> |
| ET IRA ⇒<br>International Business Machines Corporation (IBM) [ST]                   |       | \$1,001 - \$15,000   | Tax-Deferred   |             | <input type="checkbox"/> |
| ET IRA ⇒<br>MSIF Growth Portfolio Class A (MSEGX) [MF]                               |       | \$50,001 - \$100,000 | Tax-Deferred   |             | <input type="checkbox"/> |
| ET IRA ⇒<br>Pepsico, Inc. (PEP) [ST]                                                 |       | \$15,001 - \$50,000  | Tax-Deferred   |             | <input type="checkbox"/> |
| ET IRA ⇒<br>Procter & Gamble Company (PG) [ST]                                       |       | \$15,001 - \$50,000  | Tax-Deferred   |             | <input type="checkbox"/> |
| ET IRA ⇒<br>Resideo Technologies, Inc. (REZI) [ST]                                   |       | None                 | Capital Gains  | \$1 - \$200 | <input type="checkbox"/> |
| ET IRA ⇒<br>Solstice Advanced Materials Inc. - Common Stock (SOLS) [ST]              |       | \$1,001 - \$15,000   | None           |             | <input type="checkbox"/> |

| Asset                                                                                                                                                                           | Owner | Value of Asset          | Income Type(s) | Income | Tx. > \$1,000?                      |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------------------------|----------------|--------|-------------------------------------|
| ET IRA ⇒<br>Vanguard Mega Cap Value ETF (MGV) [EF]                                                                                                                              |       | \$1,001 - \$15,000      | Tax-Deferred   |        | <input type="checkbox"/>            |
| ET IRA ⇒<br>Walt Disney Company (DIS) [ST]                                                                                                                                      |       | \$1,001 - \$15,000      | Tax-Deferred   |        | <input type="checkbox"/>            |
| FMS ⇒<br>TOMBALL TX SL Assmnt Bond [CS]<br><br>DESCRIPTION: Bond                                                                                                                | JT    | \$100,001 - \$250,000   | Interest       | None   | <input checked="" type="checkbox"/> |
| FMS ⇒<br>Villages FL CDD Bond SPL Assmnt Rev [CS]<br><br>DESCRIPTION: Bond                                                                                                      | JT    | \$1,001 - \$15,000      | Interest       | None   | <input checked="" type="checkbox"/> |
| FMS IRA ⇒<br>TOBACCO SETTLEMENT FING CORP VA SER A1 TAXABLE SENIOR B/E CPN [CS] [CS]<br><br>DESCRIPTION: TOBACCO SETTLEMENT FING CORP VA SER A1 TAXABLE SENIOR B/E CPN [CS]     |       | \$1,001 - \$15,000      | Tax-Deferred   |        | <input type="checkbox"/>            |
| FMS IRA ⇒<br>US STEEL CORP BONDS CPN 6.650% DUE 06/01/37 DTD 05/21/07 FC 12/01/07 [CS]<br><br>DESCRIPTION: US STEEL CORP BONDS CPN 6.650% DUE 06/01/37 DTD 05/21/07 FC 12/01/07 |       | \$1,001 - \$15,000      | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>American Beacon The London Company Income Equity Fund Institutional Class (ABCIX) [MF]                                                                             | SP    | \$500,001 - \$1,000,000 | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>Apple Inc. (AAPL) [ST]                                                                                                                                             | SP    | \$100,001 - \$250,000   | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>Ares Capital Corporation - Closed End Fund (ARCC) [ST]                                                                                                             | SP    | \$1,001 - \$15,000      | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>Fidelity 500 Index Fund (FXAIX) [MF]                                                                                                                               | SP    | \$50,001 - \$100,000    | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>Fidelity Blue Chip Growth Fund Class K (FBGKX) [MF]                                                                                                                | SP    | \$15,001 - \$50,000     | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>McDonald's Corporation (MCD) [ST]                                                                                                                                  | SP    | \$1,001 - \$15,000      | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>Microsoft Corporation - Common Stock (MSFT) [ST]                                                                                                                   | SP    | \$1,001 - \$15,000      | Tax-Deferred   |        | <input type="checkbox"/>            |

| Asset                                                                                            | Owner | Value of Asset        | Income Type(s) | Income | Tx. > \$1,000?                      |
|--------------------------------------------------------------------------------------------------|-------|-----------------------|----------------|--------|-------------------------------------|
| IRA One ⇒<br>NVIDIA Corporation - Common Stock (NVDA) [ST]                                       | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>Schwab Fundamental U.S. Broad Market ETF (FNDB) [EF]                                | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>Schwab Fundamental U.S. Broad Market ETF (FNDB) [EF]                                | SP    | \$1,001 - \$15,000    | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| IRA One ⇒<br>Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]                               | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| IRA One ⇒<br>Schwab International Equity ETF (SCHF) [EF]                                         | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| IRA One ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]                     | SP    | None                  | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]                               | SP    | \$50,001 - \$100,000  | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA One ⇒<br>Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]                               | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| IRA One ⇒<br>Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF] | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| IRA One ⇒<br>US bank #1 [BA]                                                                     | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| IRA One ⇒<br>Vanguard Information Tech ETF (VGT) [EF]                                            | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| IRA One ⇒<br>Vanguard Mega Cap Value ETF (MGV) [EF]                                              | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input checked="" type="checkbox"/> |
| IRA Two ⇒<br>Capital Intl Core [MF]<br>DESCRIPTION: UBS                                          | SP    | \$250,001 - \$500,000 | Tax-Deferred   |        | <input type="checkbox"/>            |
| IRA Two ⇒                                                                                        | SP    | \$100,001 -           | Tax-Deferred   |        | <input type="checkbox"/>            |

| Asset                                                                                                    | Owner | Value of Asset        | Income Type(s) | Income | Tx. ><br>\$1,000?        |
|----------------------------------------------------------------------------------------------------------|-------|-----------------------|----------------|--------|--------------------------|
| Martin Currie Emerging Markets Fund Class A (MACEX) [MF]<br>DESCRIPTION: UBS IRA                         |       | \$250,000             |                |        | <input type="checkbox"/> |
| IRA Two ⇒<br>UBS US Quality Growth At Reasonable Price Fund Class P (QGRPX) [MF]<br>DESCRIPTION: UBS IRA | SP    | \$250,001 - \$500,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| IRA Two ⇒<br>US Interm Corp Bond [MF]<br>DESCRIPTION: UBS IRA                                            | SP    | \$100,001 - \$250,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| IRA Two ⇒<br>Virtus KAR Small-Mid Cap Core Fund Class I (VKSIX) [MF]<br>DESCRIPTION: UBS IRA             | SP    | \$100,001 - \$250,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| SEP 1 ⇒<br>AEPFX [MF]                                                                                    | SP    | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| SEP 1 ⇒<br>AMCAP Fund, Class F-2 Shares (AMCFX) [MF]<br>DESCRIPTION: UBS SEP                             | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/> |
| SEP 1 ⇒<br>DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]                                                 | SP    | \$50,001 - \$100,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| SEP 1 ⇒<br>Emerging Markets Core Equity 2 Portfolio (DFCEX) [MF]                                         | SP    | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| SEP 1 ⇒<br>Fundamental Investors, Class F-2 Shares (FINFX) [MF]<br>DESCRIPTION: UBS SEP                  | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/> |
| SEP 1 ⇒<br>International Core Equity 2 Portfolio (DFIEX) [MF]<br>DESCRIPTION: UBS SEP                    | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/> |
| SEP 1 ⇒<br>New World Fund, Inc., Class F-2 Shs (NFFFX) [MF]<br>DESCRIPTION: UBS SEP                      | SP    | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| SEP 1 ⇒<br>SMALLCAP World Fund, Inc., Class F-2 Shs (SMCFX)                                              | SP    | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/> |

| Asset                                                                                                 | Owner | Value of Asset        | Income Type(s)           | Income            | Tx. ><br>\$1,000?        |
|-------------------------------------------------------------------------------------------------------|-------|-----------------------|--------------------------|-------------------|--------------------------|
| [MF]                                                                                                  |       |                       |                          |                   |                          |
| DESCRIPTION: UBS SEP                                                                                  |       |                       |                          |                   |                          |
| SEP 2 ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]                            | SP    | \$15,001 - \$50,000   | Tax-Deferred             |                   | <input type="checkbox"/> |
| SEP 2 ⇒<br>Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]        | SP    | \$15,001 - \$50,000   | Tax-Deferred             |                   | <input type="checkbox"/> |
| SEP 2 ⇒<br>Vanguard Mega Cap Value ETF (MGV) [EF]                                                     | SP    | \$15,001 - \$50,000   | Tax-Deferred             |                   | <input type="checkbox"/> |
| SRH Hosp ⇒<br>SRH Hosp [RP]<br><br>LOCATION: Waco, TX, US<br>DESCRIPTION: Waco Marriott               |       | \$100,001 - \$250,000 | None                     |                   | <input type="checkbox"/> |
| Trust One ⇒<br>Abbott Laboratories (ABT) [ST]                                                         | SP    | \$50,001 - \$100,000  | Dividends                | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Trust One ⇒<br>Alphabet Inc. - Class C Capital Stock (GOOG) [ST]                                      | SP    | \$100,001 - \$250,000 | Dividends                | \$201 - \$1,000   | <input type="checkbox"/> |
| Trust One ⇒<br>Amazon.com, Inc. (AMZN) [ST]<br><br>DESCRIPTION: UBS Trust                             | SP    | \$100,001 - \$250,000 | None                     |                   | <input type="checkbox"/> |
| Trust One ⇒<br>American Beacon The London Company Income Equity Fund Institutional Class (ABCIX) [MF] | SP    | \$100,001 - \$250,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Trust One ⇒<br>Apple Inc. (AAPL) [ST]<br><br>DESCRIPTION: USB Trust                                   | SP    | \$100,001 - \$250,000 | Dividends                | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Trust One ⇒<br>Capital Intl [MF]<br><br>DESCRIPTION: UBS                                              | SP    | \$100,001 - \$250,000 | Dividends                | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Trust One ⇒<br>Chipotle Mexican Grill, Inc. (CMG) [ST]<br><br>DESCRIPTION: UBS                        | SP    | \$50,001 - \$100,000  | None                     |                   | <input type="checkbox"/> |
|                                                                                                       |       |                       |                          |                   |                          |

| Asset                                                                                          | Owner | Value of Asset            | Income Type(s) | Income                  | Tx. > \$1,000?                      |
|------------------------------------------------------------------------------------------------|-------|---------------------------|----------------|-------------------------|-------------------------------------|
| Trust One ⇒<br>Costco Wholesale Corporation - Common Stock (COST) [ST]<br><br>DESCRIPTION: UBS | SP    | \$100,001 - \$250,000     | Dividends      | \$1,001 - \$2,500       | <input type="checkbox"/>            |
| Trust One ⇒<br>Costco Wholesale Corporation - Common Stock (COST) [ST]                         | SP    | \$1,001 - \$15,000        | Dividends      | \$1 - \$200             | <input type="checkbox"/>            |
| Trust One ⇒<br>Danaher Corporation Common Stock (DHR) [ST]                                     | SP    | None                      | Capital Gains  | \$15,001 - \$50,000     | <input checked="" type="checkbox"/> |
| Trust One ⇒<br>Invesco QQQ Trust, Series 1 (QQQ) [EF]<br><br>DESCRIPTION: UBS Trust            | SP    | \$50,001 - \$100,000      | Dividends      | \$201 - \$1,000         | <input type="checkbox"/>            |
| Trust One ⇒<br>Invesco QQQ Trust, Series 1 (QQQ) [ST]<br><br>DESCRIPTION: CS Trust             | SP    | \$15,001 - \$50,000       | Dividends      | \$1 - \$200             | <input type="checkbox"/>            |
| Trust One ⇒<br>Johnson & Johnson Common Stock (JNJ) [ST]                                       | SP    | None                      | Capital Gains  | \$15,001 - \$50,000     | <input checked="" type="checkbox"/> |
| Trust One ⇒<br>London Co LCV [MF]                                                              | SP    | \$100,001 - \$250,000     | Dividends      | \$201 - \$1,000         | <input type="checkbox"/>            |
| Trust One ⇒<br>Mastercard Incorporated (MA) [ST]                                               | SP    | \$15,001 - \$50,000       | Dividends      | \$201 - \$1,000         | <input type="checkbox"/>            |
| Trust One ⇒<br>McDonald's Corporation Common Stock (MCD) [ST]                                  | SP    | \$1,001 - \$15,000        | Dividends      | \$1 - \$200             | <input type="checkbox"/>            |
| Trust One ⇒<br>MetLife [FN]                                                                    | SP    | \$1,000,001 - \$5,000,000 | Interest       | \$100,001 - \$1,000,000 | <input type="checkbox"/>            |
| Trust One ⇒<br>Microsoft Corporation (MSFT) [ST]<br><br>DESCRIPTION: UBS Trust                 | SP    | \$250,001 - \$500,000     | Dividends      | \$1,001 - \$2,500       | <input type="checkbox"/>            |
| Trust One ⇒<br>Microsoft Corporation (MSFT) [ST]<br><br>DESCRIPTION: CS                        | SP    | \$15,001 - \$50,000       | Dividends      | \$201 - \$1,000         | <input type="checkbox"/>            |
| Trust One ⇒<br>National Life Group [WU]                                                        | SP    | \$50,001 - \$100,000      | Interest       | \$2,501 - \$5,000       | <input type="checkbox"/>            |

| Asset                                                                                                                              | Owner | Value of Asset          | Income Type(s)           | Income              | Tx. > \$1,000?                      |
|------------------------------------------------------------------------------------------------------------------------------------|-------|-------------------------|--------------------------|---------------------|-------------------------------------|
| Trust One ⇒<br>NVIDIA Corporation - Common Stock (NVDA) [ST]<br><br>DESCRIPTION: UBS                                               | SP    | \$250,001 - \$500,000   | Dividends                | \$1 - \$200         | <input type="checkbox"/>            |
| Trust One ⇒<br>NVIDIA Corporation - Common Stock (NVDA) [ST]<br><br>DESCRIPTION: CS                                                | SP    | \$100,001 - \$250,000   | Dividends                | \$1 - \$200         | <input type="checkbox"/>            |
| Trust One ⇒<br>Residential Real Estate #5 - Private Mortgage [RP]<br><br>LOCATION: Winter Park, FL, US<br>DESCRIPTION: KB1         | SP    | \$100,001 - \$250,000   | Interest, Rent           | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Trust One ⇒<br>Residential Real Estate #1 [RP]<br><br>LOCATION: Winter Park, FL, US<br>DESCRIPTION: PA1                            | SP    | \$250,001 - \$500,000   | Rent                     | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Trust One ⇒<br>Residential Real Estate #2 [RP]<br><br>LOCATION: Winter Park, FL, US<br>DESCRIPTION: PA2                            | SP    | \$250,001 - \$500,000   | Rent                     | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Trust One ⇒<br>Residential Real Estate #3 [RP]<br><br>LOCATION: Winter Park, FL, US<br>DESCRIPTION: KB2                            | SP    | \$250,001 - \$500,000   | Rent                     | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Trust One ⇒<br>Residential Real Estate #4 - Private Mortgage [OT]<br><br>DESCRIPTION: tate #4 - Private Mortgage - Winter Park, FL | SP    | \$250,001 - \$500,000   | Interest                 | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Trust One ⇒<br>Schwab Fundamental US Lg Company Index Fund Insti Shs (SFLNX) [MF]                                                  | SP    | \$15,001 - \$50,000     | Capital Gains, Dividends | \$201 - \$1,000     | <input checked="" type="checkbox"/> |
| Trust One ⇒<br>Schwab International Equity ETF (SCHF) [EF]                                                                         | SP    | \$15,001 - \$50,000     | Dividends                | \$201 - \$1,000     | <input type="checkbox"/>            |
| Trust One ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]                                                     | SP    | \$500,001 - \$1,000,000 | Interest                 | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Trust One ⇒                                                                                                                        | SP    | \$50,001 -              | Capital Gains,           | \$201 - \$1,000     | <input type="checkbox"/>            |

| Asset                                                                                                     | Owner | Value of Asset          | Income Type(s)           | Income              | Tx. > \$1,000?                      |
|-----------------------------------------------------------------------------------------------------------|-------|-------------------------|--------------------------|---------------------|-------------------------------------|
| Schwab U.S. Large-Cap ETF (SCHX) [EF]<br>DESCRIPTION: CS                                                  |       | \$100,000               | Dividends                |                     | <input type="checkbox"/>            |
| Trust One ⇒ Starbucks Corporation (SBUX) [ST]<br>DESCRIPTION: UBS                                         | SP    | \$15,001 - \$50,000     | Dividends                | \$1,001 - \$2,500   | <input type="checkbox"/>            |
| Trust One ⇒ TJX Companies, Inc. (TJX) [ST]<br>DESCRIPTION: UBS Trust                                      | SP    | \$15,001 - \$50,000     | Dividends                | \$201 - \$1,000     | <input type="checkbox"/>            |
| Trust One ⇒ UBS Muni [MF]<br>DESCRIPTION: UBS Trust                                                       | SP    | \$500,001 - \$1,000,000 | Interest                 | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Trust One ⇒ UBS US Quality Growth At Reasonable Price Fund Class P (QGRPX) [MF]<br>DESCRIPTION: UBS Trust | SP    | \$100,001 - \$250,000   | Capital Gains, Dividends | \$201 - \$1,000     | <input type="checkbox"/>            |
| Trust One ⇒ US Bank #1 [BA]                                                                               | SP    | \$15,001 - \$50,000     | Interest                 | \$201 - \$1,000     | <input type="checkbox"/>            |
| Trust One ⇒ US Bank #2 [BA]<br>DESCRIPTION: CS Trust                                                      | SP    | \$1,001 - \$15,000      | Interest                 | \$1 - \$200         | <input type="checkbox"/>            |
| Trust One ⇒ US Bank #3 [BA]                                                                               | SP    | \$15,001 - \$50,000     | Interest                 | \$1 - \$200         | <input type="checkbox"/>            |
| Trust One ⇒ Vanguard Information Tech ETF (VGT) [EF]                                                      | SP    | \$15,001 - \$50,000     | Capital Gains, Dividends | \$1 - \$200         | <input checked="" type="checkbox"/> |
| Trust One ⇒ Vanguard Mega Cap Value ETF (MGV) [EF]<br>DESCRIPTION: CS Trust                               | SP    | \$50,001 - \$100,000    | Dividends                | \$201 - \$1,000     | <input type="checkbox"/>            |
| Trust One ⇒ Virtus KAR Small-Mid Cap Core Fund Class I (VKSIX) [MF]<br>DESCRIPTION: UBS Trust             | SP    | \$100,001 - \$250,000   | Dividends                | \$201 - \$1,000     | <input type="checkbox"/>            |
| Trust One ⇒ Visa Inc. (V) [ST]<br>DESCRIPTION: UBS Trust                                                  | SP    | \$15,001 - \$50,000     | Dividends                | \$1 - \$200         | <input type="checkbox"/>            |

| Asset                                                                | Owner | Value of Asset      | Income Type(s) | Income          | Tx. > \$1,000?           |
|----------------------------------------------------------------------|-------|---------------------|----------------|-----------------|--------------------------|
| Trust One ⇒<br>Visa Inc. (V) [ST]<br><br>DESCRIPTION: CS Trust       | SP    | \$1,001 - \$15,000  | Dividends      | \$1 - \$200     | <input type="checkbox"/> |
| Trust One ⇒<br>Walmart Inc. (WMT) [ST]<br><br>DESCRIPTION: CS Trust  | SP    | \$1 - \$1,000       | Dividends      | \$1 - \$200     | <input type="checkbox"/> |
| Trust One ⇒<br>Walmart Inc. (WMT) [ST]<br><br>DESCRIPTION: UBS Trust | SP    | \$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?                 |
|---------------------------------------------------------------------------------------------------------------------------------------------|-------|------------|----------|-----------------------|-------------------------------------|
| Trust One ⇒<br>Danaher Corporation Common Stock (DHR) [ST]                                                                                  | SP    | 06/12/2025 | S        | \$50,001 - \$100,000  | <input checked="" type="checkbox"/> |
| Trust One ⇒<br>Johnson & Johnson Common Stock (JNJ) [ST]                                                                                    | SP    | 06/12/2025 | S        | \$15,001 - \$50,000   | <input checked="" type="checkbox"/> |
| ET IRA ⇒<br>Banc of California, Inc. (BANC) [ST]                                                                                            |       | 01/23/2026 | S        | \$1,001 - \$15,000    | <input type="checkbox"/>            |
| ET IRA ⇒<br>Garrett Motion Inc. (GTX) [ST]                                                                                                  |       | 01/23/2026 | S        | \$218.94              | <input type="checkbox"/>            |
| FMS IRA ⇒<br>Tomball TX 889858AE6 [CS]<br><br>DESCRIPTION: Bond                                                                             |       | 08/25/2025 | P        | \$100,001 - \$250,000 |                                     |
| FMS ⇒<br>VLG FL CDD #14 SPL ASSMNT REV DUE 05/01/2053 05.500% [CS]<br><br>DESCRIPTION: VLG FL CDD #14 SPL ASSMNT REV DUE 05/01/2053 05.500% | JT    | 10/24/2025 | P        | \$15,001 - \$50,000   |                                     |
| IRA One ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]                                                                | SP    | 01/20/2026 | S        | \$15,001 - \$50,000   | <input type="checkbox"/>            |

| Asset                                                                                   | Owner | Date       | Tx. Type    | Amount              | Cap. Gains > \$200?                 |
|-----------------------------------------------------------------------------------------|-------|------------|-------------|---------------------|-------------------------------------|
| IRA One ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]            | SP    | 03/24/2026 | S           | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| IRA One ⇒<br>Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]                      | SP    | 01/20/2026 | P           | \$15,001 - \$50,000 |                                     |
| IRA One ⇒<br>Vanguard Information Tech ETF (VGT) [EF]                                   | SP    | 03/27/2025 | P           | \$15,001 - \$50,000 |                                     |
| IRA One ⇒<br>Vanguard Mega Cap Value ETF (MGV) [EF]                                     | SP    | 03/31/2025 | P           | \$15,001 - \$50,000 |                                     |
| 529 1 ⇒<br>529 1 Prepaid [5P]<br><br>LOCATION: FL<br>DESCRIPTION: Tuition reimbursement | SP    | 12/31/2025 | E           | \$1,001 - \$15,000  |                                     |
| 529 1 ⇒<br>529 1 [5P]<br><br>LOCATION: IA<br>DESCRIPTION: Tuition                       | SP    | 09/20/2025 | S (partial) | \$15,001 - \$50,000 |                                     |
| 529 3 ⇒<br>529 3 [5P]<br><br>LOCATION: IA<br>DESCRIPTION: Tuition                       | SP    | 01/07/2026 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Strategy Shares Nasdaq 7HANDL Index ETF (HNDL) [EF]                                     |       | 04/17/2026 | S           | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]                                   |       | 03/13/2026 | P           | \$15,001 - \$50,000 |                                     |
| IRA One ⇒<br>Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]                      | SP    | 01/20/2026 | P           | \$15,001 - \$50,000 |                                     |
| IRA One ⇒<br>Schwab International Equity ETF (SCHF) [EF]                                | SP    | 02/06/2026 | P           | \$15,001 - \$50,000 |                                     |
| IRA One ⇒<br>Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]                      | SP    | 02/25/2026 | P           | \$1,001 - \$15,000  |                                     |
| IRA One ⇒<br>Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]                      | SP    | 01/02/2026 | P           | \$15,001 - \$50,000 |                                     |

| Asset                                                                        | Owner | Date       | Tx. Type | Amount                | Cap. Gains > \$200?                 |
|------------------------------------------------------------------------------|-------|------------|----------|-----------------------|-------------------------------------|
| IRA One ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF] | SP    | 01/02/2026 | S        | \$15,001 - \$50,000   | <input type="checkbox"/>            |
| IRA One ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF] | SP    | 02/05/2026 | S        | \$15,001 - \$50,000   | <input type="checkbox"/>            |
| CS SEP ⇒<br>Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]            |       | 01/20/2026 | P        | \$1,001 - \$15,000    |                                     |
| CS SEP ⇒<br>Schwab International Equity ETF (SCHF) [EF]                      |       | 02/02/2026 | P        | \$15,001 - \$50,000   |                                     |
| CS SEP ⇒<br>Schwab US Dividend Equity ETF (SCHD) [EF]                        |       | 02/17/2026 | P        | \$15,001 - \$50,000   |                                     |
| CS SEP ⇒<br>Schwab U.S. Large-Cap ETF (SCHX) [EF]                            |       | 01/08/2026 | P        | \$1,001 - \$15,000    |                                     |
| CS SEP ⇒<br>Vanguard Information Tech ETF (VGT) [EF]                         |       | 11/19/2025 | P        | \$100,001 - \$250,000 |                                     |
| ET Invest ⇒<br>CVS Health Corporation Common Stock (CVS) [ST]                |       | 03/07/2025 | S        | \$15,001 - \$50,000   | <input checked="" type="checkbox"/> |
| ET Invest ⇒<br>US Bank #3 (cash) [BA]<br>DESCRIPTION: CD                     |       | 03/24/2025 | P        | \$1,001 - \$15,000    |                                     |
| ET Invest ⇒<br>US Bank #3 (cash) [BA]                                        |       | 07/01/2025 | S        | \$1,001 - \$15,000    | <input type="checkbox"/>            |
| Trust One ⇒<br>Schwab International Equity ETF (SCHF) [EF]                   | SP    | 02/06/2026 | P        | \$1,001 - \$15,000    |                                     |
| Trust One ⇒<br>Schwab International Equity ETF (SCHF) [EF]                   | SP    | 02/27/2026 | P        | \$1,001 - \$15,000    |                                     |
| Trust One ⇒<br>Schwab International Equity ETF (SCHF) [EF]                   | SP    | 03/02/2026 | P        | \$1,001 - \$15,000    |                                     |

| Asset                                                                             | Owner | Date       | Tx. Type | Amount                | Cap. Gains > \$200? |
|-----------------------------------------------------------------------------------|-------|------------|----------|-----------------------|---------------------|
| Trust One ⇒<br>Schwab U.S. Large-Cap ETF (SCHX) [EF]                              | SP    | 01/02/2026 | P        | \$15,001 - \$50,000   |                     |
| Trust One ⇒<br>Vanguard Information Tech ETF (VGT) [EF]                           | SP    | 01/02/2026 | P        | \$15,001 - \$50,000   |                     |
| Trust One ⇒<br>Schwab Fundamental US Lg Company Index Fund Insti Shs (SFLNX) [MF] | SP    | 01/02/2026 | P        | \$1,001 - \$15,000    |                     |
| Trust One ⇒<br>Schwab Fundamental US Lg Company Index Fund Insti Shs (SFLNX) [MF] | SP    | 02/05/2026 | P        | \$1,001 - \$15,000    |                     |
| Trust One ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]    | SP    | 05/01/2025 | P        | \$15,001 - \$50,000   |                     |
| Trust One ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]    | SP    | 08/14/2025 | P        | \$100,001 - \$250,000 |                     |
| Trust One ⇒<br>Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]    | SP    | 01/02/2026 | P        | \$50,001 - \$100,000  |                     |

\* 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      |
|------------------|------------------|-------------|
| Fidelity         | Pension          | \$15,780.00 |
| IRA Distribution | IRA Distribution | \$79,621.00 |
| Fissionaire      | Spouse Fee       | N/A         |

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

| Position                   | Name of Organization             |
|----------------------------|----------------------------------|
| Executive Committee Member | National Eagle Scout Association |

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?                             |
| The Ripon Society | 08/02/2025 | 08/09/2025 | ACT - GVA - ACT | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Trust One (100% Interest) (Owner: SP)
- IRA One (Owner: SP)
- IRA Two (Owner: SP)
- SEP 2 (Owner: SP)
- CS SEP
- ET IRA
- SRH Hosp  
LOCATION: US
- 529 1 (Owner: SP)  
LOCATION: IA
- 529 3 (Owner: SP)  
LOCATION: IA
- SEP 1 (Owner: SP)
- FMS IRA
- ET Invest
- FMS (Owner: JT)

## 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. Pete Sessions , 04/28/2026