



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Morgan McGarvey
Status: Member
State/District: KY03

FILING INFORMATION

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

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Republic Bank Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Republic Bank Savings [BA]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
Results By Design LLC [OL] LOCATION: Louisville, KY, US DESCRIPTION: Consulting firm	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Series I Savings Bond [GS] DESCRIPTION: Fully redeemed		None	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Series I Savings Bond [GS] DESCRIPTION: Fully redeemed	SP	None	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
State of Kentucky Legislators Benefit Plan [DB]		Undetermined	None		<input type="checkbox"/>
Chris IRA ⇒ Chris IRA Cash [IH]	SP	None	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Chris IRA ⇒ Global X U.S. Preferred ETF (PFFD) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris IRA ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred to Chris Results by Design 401K					
Chris IRA ⇒ SPDR Index Shares Fund SPDR Portfolio Emerging Markets ETF (SPEM) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred to Chris Results by Design 401K					
Chris IRA ⇒ SPDR Portfolio Developed World ex-US ETF (SPDW) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred to Chris Results by Design 401K					
Chris IRA ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred to Chris Results by Design 401K					
Chris IRA ⇒ SPDR Portfolio Intermediate Term Treasury ETF (SPTI) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred to Chris Results by Design 401K					
Chris IRA ⇒ SPDR Portfolio Mortgage Backed Bond ETF (SPMB) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris IRA ⇒ SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris IRA ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris IRA ⇒ SPDR Series Trust SPDR Portfolio S&P 500 Growth ETF	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
(SPYG) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K					
Chris IRA ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF] DESCRIPTION: Transferred into Chris Results by Design 401K	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris IRA ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris IRA ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K	SP	None	None		<input checked="" type="checkbox"/>
Chris IRA ⇒ VictoryShares US Small Cap Volatility Wtd ETF (CSA) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Results By Design 401K ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF] DESCRIPTION: Transferred from Chris IRA and Chris SEP	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Chris Results By Design 401K ⇒ JP Morgan U.S. Govt Money Market Premier Cl (OGSXX) [BA] DESCRIPTION: Transferred from Chris SEP	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Chris Results By Design 401K ⇒ State Street SPDR Portfolio Developed World ex-US ETF (SPDW) [EF] DESCRIPTION: Transferred from Chris IRA and Chris SEP	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Chris Results By Design 401K ⇒ State Street SPDR Portfolio Emerging Markets ETF (SPEM) [EF] DESCRIPTION: Transferred from Chris IRA and Chris SEP	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Chris Results By Design 401K ⇒ State Street SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF] DESCRIPTION: Transferred from Chris IRA and Chris SEP	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Chris Results By Design 401K ⇒ State Street SPDR Portfolio Intermediate Term Treasury ETF (SPTI) [EF] DESCRIPTION: Transferred from Chris IRA and Chris SEP	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Chris Results By Design 401K ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF] DESCRIPTION: Transferred from Chris IRA and Chris SEP	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Chris Results By Design 401K ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF] DESCRIPTION: Transferred from Chris IRA and Chris SEP	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Chris Results By Design 401K ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF] DESCRIPTION: Transferred from Chris IRA and Chris SEP	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Chris Results By Design 401K ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF] DESCRIPTION: Transferred from Chris IRA and Chris SEP	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Chris Roth ⇒ Chris Roth Cash [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Chris Roth ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ SPDR Index Shares Fund SPDR Portfolio Emerging Markets ETF (SPEM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ SPDR Portfolio Developed World ex-US ETF (SPDW) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Chris Roth ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Chris Roth ⇒ SPDR Portfolio Intermediate Term Treasury ETF (SPTI) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Chris Roth ⇒ SPDR Portfolio Mortgage Backed Bond ETF (SPMB) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Chris Roth ⇒ SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ SPDR Series Trust SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Chris Roth ⇒ VictoryShares US Small Cap Volatility Wtd ETF (CSA) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ Chris SEP Cash [IH]	SP	None	Tax-Deferred		<input type="checkbox"/>
Chris SEP ⇒ Global X U.S. Preferred ETF (PFFD) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred to Chris Results by Design 401K					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Chris SEP ⇒ JPMorgan US Government Money Market Fund (OGSXX) [BA] DESCRIPTION: Transferred to Results by Design 401K	SP	None	Tax-Deferred		<input type="checkbox"/>
Chris SEP ⇒ SPDR Index Shares Fund SPDR Portfolio Emerging Markets ETF (SPEM) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ SPDR Portfolio Developed World ex-US ETF (SPDW) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K	SP	None	Tax-Deferred		<input type="checkbox"/>
Chris SEP ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K	SP	None	Tax-Deferred		<input type="checkbox"/>
Chris SEP ⇒ SPDR Portfolio Intermediate Term Treasury ETF (SPTI) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K	SP	None	Tax-Deferred		<input type="checkbox"/>
Chris SEP ⇒ SPDR Portfolio Mortgage Backed Bond ETF (SPMB) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ SPDR Series Trust SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Chris SEP ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF] DESCRIPTION: Transferred to Chris Results by Design 401K	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Chris SEP ⇒ VictoryShares US Small Cap Volatility Wtd ETF (CSA) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Health Savings Account ⇒ HSA Cash Account [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Health Savings Account ⇒ Vanguard Target Retirement 2030 Fund (VTHR) [MF] DESCRIPTION: Purchases less than \$1,000	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Heaven Hill Distilleries, Inc 401(K) ⇒ BlackRock High Yield Bond Portfolio - Class A (BHYAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Heaven Hill Distilleries, Inc 401(K) ⇒ Columbia Fds Srs Tr., Columbia MidCap Index Fund Class A (NTIAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Heaven Hill Distilleries, Inc 401(K) ⇒ Columbia Select Large Cap Value Fund Class A (SLVAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Heaven Hill Distilleries, Inc 401(K) ⇒ Invesco Stable Value Retirement Fund Class 1 [OT] DESCRIPTION: Stable Value Fund	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Heaven Hill Distilleries, Inc 401(K) ⇒ iShares S&P 500 Index Fund - Institutional (BSPIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Heaven Hill Distilleries, Inc 401(K) ⇒ MFS International Diversification Fund Class A (MDIDX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Heaven Hill Distilleries, Inc 401(K) ⇒ Neuberger Berman Genesis Trust (NBGEX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Heaven Hill Distilleries, Inc 401(K) ⇒ PGIM Total Return Bond Fund Class R4 (PDBSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Heaven Hill Distilleries, Inc 401(K) ⇒ PIMCO Income Fund Class A (PONAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Heaven Hill Distilleries, Inc 401(K) ⇒ Undiscovered Managers Behavioral Value Fund - R5 (UBVVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Joint Brokerage ⇒ Global X U.S. Preferred ETF (PFFD) [EF] DESCRIPTION: Full sale less than \$1,000	JT	None	None		<input type="checkbox"/>
Joint Brokerage ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ Joint Brokerage Cash [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Joint Brokerage ⇒ SPDR Index Shares Fund SPDR Portfolio Emerging Markets ETF (SPEM) [EF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ SPDR Portfolio Developed World ex-US ETF (SPDW) [EF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Joint Brokerage ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ SPDR Portfolio Intermediate Term Treasury ETF (SPTI) [EF] DESCRIPTION: Sales less than \$1,000	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Joint Brokerage ⇒ SPDR Portfolio Mortgage Backed Bond ETF (SPMB) [EF]	JT	None	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Joint Brokerage ⇒ SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	JT	None	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	JT	None	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	JT	None	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	JT	None	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ SPDR Series Trust SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Joint Brokerage ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF] DESCRIPTION: Appreciated over \$1,000 in 2025	JT	None	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ State Street Industrial Select Sector SPDR ETF (XLI) [EF] DESCRIPTION: Appreciated over \$1,000 in 2025	JT	None	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Joint Brokerage ⇒ VictoryShares US Small Cap Volatility Wtd ETF (CSA) [EF]	JT	None	None		<input checked="" type="checkbox"/>
LPL Joint Brokerage ⇒ Insured Cash Account [BA] DESCRIPTION: Transferred from Vanguard Brokerage	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
LPL Joint Brokerage ⇒ Vanguard S&P 500 Value ETF (VOOV) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Transferred from Vanguard Brokerage					
LPL Joint Brokerage ⇒ Vanguard Total World Stock Index ETF (VT) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Transferred from Vanguard Brokerage					
Morgan Results By Design 401K ⇒ Cash [BA]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Morgan Roth ⇒ Global X U.S. Preferred ETF (PFFD) [EF]		None	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Full sale less than \$1,000					
Morgan Roth ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ Morgan Roth Cash [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Roth ⇒ SPDR Index Shares Fund SPDR Portfolio Emerging Markets ETF (SPEM) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ SPDR Portfolio Developed World ex-US ETF (SPDW) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Roth ⇒ SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Roth ⇒ SPDR Portfolio Intermediate Term Treasury ETF (SPTI) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Roth ⇒ SPDR Portfolio Mortgage Backed Bond ETF (SPMB) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Roth ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ SPDR Series Trust SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Roth ⇒ VictoryShares US Small Cap Volatility Wtd ETF (CSA) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
NY 529 Plan - DC1 ⇒ Target Enrollment 2032 [5F] LOCATION: NY	DC	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
NY 529 Plan - DC2 ⇒ Target Enrollment 2032 [5F] LOCATION: NY	DC	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
UTMA - DC1 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST] DESCRIPTION: Portfolio not managed by filer or filer's spouse; holding gifted stock until child reaches age 18.	DC	\$15,001 - \$50,000	None		<input type="checkbox"/>
UTMA - DC2 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST] DESCRIPTION: Portfolio not managed by filer or filer's spouse; holding gifted stock until child reaches age 18.	DC	\$15,001 - \$50,000	None		<input type="checkbox"/>
UTMA - DC3 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	DC	\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Portfolio not managed by filer or filer's spouse; holding gifted stock until child reaches age 18.					
Vanguard Brokerage ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	JT	None	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Transferred to LPL Joint Brokerage					
Vanguard Brokerage ⇒ Vanguard S&P 500 Value ETF (VOOV) [EF]	JT	None	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Transferred to LPL Joint Brokerage					
Vanguard Brokerage ⇒ Vanguard Total World Stock Index ETF (VT) [EF]	JT	None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to LPL Joint Brokerage					
Voya Financial - Morgan & Pottinger PSC 401(k) ⇒ Vanguard Target Retirement 2055 Fund (VFFVX) [MF]		None	Tax-Deferred		<input checked="" 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?
Chris Roth ⇒ State Street Industrial Select Sector SPDR ETF (XLI) [EF]	SP	06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris Roth ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	SP	03/04/2025	P	\$1,001 - \$15,000	
Chris Roth ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF]	SP	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris Roth ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris Roth ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]	SP	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris Roth ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]	SP	06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Chris Roth ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris Roth ⇒ State Street SPDR Portfolio Emerging Markets ETF (SPEM) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris Roth ⇒ State Street SPDR Portfolio Mortgage Backed Bond ETF (SPMB) [EF]	SP	03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris Roth ⇒ State Street SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	SP	03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris Roth ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	10/29/2025	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Chris Roth ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	03/04/2025	P	\$1,001 - \$15,000	
Chris Roth ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]	SP	10/29/2025	P	\$1,001 - \$15,000	
Chris Roth ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF]	SP	03/04/2025	P	\$1,001 - \$15,000	
Chris Roth ⇒ VictoryShares US Small Cap Volatility Wtd ETF (CSA) [EF]	SP	03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Roth ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF]		10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Roth ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]		10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Roth ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]		10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Roth ⇒ State Street Industrial Select Sector SPDR ETF (XLI) [EF]		06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Roth ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]		06/18/2025	P	\$1,001 - \$15,000	
Morgan Roth ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]		03/04/2025	P	\$1,001 - \$15,000	
Morgan Roth ⇒ State Street SPDR Portfolio Mortgage Backed Bond ETF (SPMB) [EF]		03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Roth ⇒ State Street SPDR Portfolio Emerging Markets ETF (SPEM) [EF]		06/18/2025	P	\$1,001 - \$15,000	
Morgan Roth ⇒ State Street SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]		03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Roth ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]		10/29/2025	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Roth ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]		03/04/2025	P	\$1,001 - \$15,000	
Morgan Roth ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF]		06/18/2025	P	\$1,001 - \$15,000	
Morgan Roth ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]		06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Roth ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]		10/29/2025	P	\$1,001 - \$15,000	
Morgan Roth ⇒ VictoryShares US Small Cap Volatility Wtd ETF (CSA) [EF]		03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris IRA ⇒ Global X U.S. Preferred ETF (PFFD) [EF]	SP	06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris IRA ⇒ State Street Industrial Select Sector SPDR ETF (XLI) [EF]	SP	06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris IRA ⇒	SP	06/18/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]					
Chris IRA ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	SP	10/29/2025	P	\$1,001 - \$15,000	
Chris IRA ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	SP	03/04/2025	P	\$15,001 - \$50,000	
Chris IRA ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF]	SP	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris IRA ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]	SP	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris IRA ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]	SP	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris IRA ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]	SP	06/18/2025	S	\$15,001 - \$50,000	<input type="checkbox"/>
Chris IRA ⇒ State Street SPDR Portfolio Developed World ex-US ETF (SPDW) [EF]	SP	03/04/2025	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Chris IRA ⇒ State Street SPDR Portfolio Emerging Markets ETF (SPEM) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris IRA ⇒ State Street SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]	SP	10/29/2025	P	\$1,001 - \$15,000	
Chris IRA ⇒ State Street SPDR Portfolio Intermediate Term Treasury ETF (SPTI) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris IRA ⇒ State Street SPDR Portfolio Intermediate Term Treasury ETF (SPTI) [EF]	SP	10/29/2025	P	\$1,001 - \$15,000	
Chris IRA ⇒ State Street SPDR Portfolio Mortgage Backed Bond ETF (SPMB) [EF]	SP	03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Chris IRA ⇒ State Street SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	SP	03/04/2025	S	\$15,001 - \$50,000	<input type="checkbox"/>
Chris IRA ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	10/29/2025	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Chris IRA ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	03/04/2025	P	\$1,001 - \$15,000	
Chris IRA ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris IRA ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris IRA ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]	SP	03/04/2025	P	\$1,001 - \$15,000	
Chris IRA ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]	SP	10/29/2025	P	\$15,001 - \$50,000	
Chris IRA ⇒ VictoryShares US Small Cap Volatility Wtd ETF (CSA) [EF]	SP	03/04/2025	S	\$15,001 - \$50,000	<input type="checkbox"/>
Chris IRA ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF]	SP	03/04/2025	P	\$15,001 - \$50,000	
Chris SEP ⇒ Global X U.S. Preferred ETF (PFFD) [EF]	SP	06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris SEP ⇒ State Street Industrial Select Sector SPDR ETF (XLI) [EF]	SP	06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris SEP ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF]	SP	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris SEP ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]	SP	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris SEP ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]	SP	06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Chris SEP ⇒ State Street SPDR Portfolio Mortgage Backed Bond ETF (SPMB) [EF]	SP	03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris SEP ⇒ State Street SPDR Portfolio Emerging Markets ETF (SPEM) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris SEP ⇒ State Street SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	SP	03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris SEP ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	10/29/2025	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Chris SEP ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	SP	03/04/2025	P	\$1,001 - \$15,000	
Chris SEP ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris SEP ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris SEP ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]	SP	10/29/2025	P	\$1,001 - \$15,000	
Chris SEP ⇒ VictoryShares US Small Cap Volatility Wtd ETF (CSA) [EF]	SP	03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Chris SEP ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF]	SP	03/04/2025	P	\$1,001 - \$15,000	
Chris SEP ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	SP	06/18/2025	P	\$1,001 - \$15,000	
Chris SEP ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	SP	03/04/2025	P	\$1,001 - \$15,000	
Morgan Roth ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF]		03/04/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Joint Brokerage ⇒ State Street Industrial Select Sector SPDR ETF (XLI) [EF]	JT	06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Joint Brokerage ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	JT	06/18/2025	P	\$1,001 - \$15,000	
Joint Brokerage ⇒ John Hancock Mortgage-Backed Securities ETF (JHMB) [EF]	JT	03/04/2025	P	\$1,001 - \$15,000	
Joint Brokerage ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF]	JT	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Joint Brokerage ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]	JT	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Joint Brokerage ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]	JT	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Joint Brokerage ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]	JT	06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Joint Brokerage ⇒ State Street SPDR Portfolio Emerging Markets ETF (SPEM) [EF]	JT	06/18/2025	P	\$1,001 - \$15,000	
Joint Brokerage ⇒ State Street SPDR Portfolio Mortgage Backed Bond ETF (SPMB) [EF]	JT	06/18/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Joint Brokerage ⇒ State Street SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]	JT	06/18/2025	P	\$1,001 - \$15,000	
Joint Brokerage ⇒ State Street SPDR Portfolio Intermediate Term Corporate Bond ETF (SPIB) [EF]	JT	03/04/2025	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Joint Brokerage ⇒ State Street SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	JT	03/04/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Joint Brokerage ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	JT	10/29/2025	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Joint Brokerage ⇒ State Street SPDR Portfolio S&P 500 Growth ETF (SPYG) [EF]	JT	03/04/2025	P	\$1,001 - \$15,000	
Heaven Hill Distilleries, Inc 401(K) ⇒ Columbia Fds Srs Tr., Columbia MidCap Index Fund Class A (NTIAX) [MF]	SP	12/05/2025	P	\$1,001 - \$15,000	
Heaven Hill Distilleries, Inc 401(K) ⇒ Columbia Select Large Cap Value Fund Class A (SLVAX) [MF]	SP	12/09/2025	P	\$1,001 - \$15,000	
Heaven Hill Distilleries, Inc 401(K) ⇒ MFS International Diversification Fund Class A (MDIDX) [MF]	SP	12/23/2025	P	\$1,001 - \$15,000	
Voya Financial - Morgan & Pottinger PSC 401(k) ⇒ Vanguard Target Retirement 2055 Fund (VFFVX) [MF]		10/14/2025	S	\$100,001 - \$250,000	<input type="checkbox"/>
Chris SEP ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]	SP	10/29/2025	S	\$1,001 - \$15,000	<input type="checkbox"/>
Joint Brokerage ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF]	JT	06/18/2025	P	\$1,001 - \$15,000	
Joint Brokerage ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]	JT	06/18/2025	P	\$1,001 - \$15,000	
Joint Brokerage ⇒ VictoryShares Free Cash Flow ETF (VFLO) [EF]	JT	10/29/2025	P	\$1,001 - \$15,000	
Joint Brokerage ⇒ VictoryShares Small Cap Free Cash Flow ETF (SFLO) [EF]	JT	03/04/2025	P	\$1,001 - \$15,000	
Joint Brokerage ⇒ VictoryShares US Small Cap Volatility Wtd ETF (CSA) [EF]	JT	03/04/2025	S	\$1,001 - \$15,000	<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 C: EARNED INCOME

Source	Type	Amount
LifePoint Health	Spouse Salary	N/A

Heaven Hill	Spouse Salary	N/A
Results by Design LLC	Spouse consulting income	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Republic Bank & Trust	December 2016	Personal Mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2023	Morgan McGarvey and the state of Kentucky	Future Pension
November 2022	Morgan McGarvey and Morgan & Pottinger PSC	Continued participation in a defined benefit retirement plan managed by former employer through October 2025. Agreement no longer in effect.

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

- o NY 529 Plan - DC1 (Owner: DC)
LOCATION: NY
- o Chris IRA (Owner: SP)
- o Chris Roth (Owner: SP)
- o Chris SEP (Owner: SP)
- o Morgan Roth
- o Joint Brokerage (Owner: JT)
LOCATION: US

- NY 529 Plan - DC2 (Owner: DC)
LOCATION: NY
- Vanguard Brokerage (Owner: JT)
- Heaven Hill Distilleries, Inc 401(K) (Owner: SP)
- UTMA - DC1 (Owner: DC)
- UTMA - DC2 (Owner: DC)
- UTMA - DC3 (Owner: DC)
- Voya Financial - Morgan & Pottinger PSC 401(k)
- Chris Results By Design 401K (Owner: SP)
- LPL Joint Brokerage (Owner: JT)
- Morgan Results By Design 401K
- Health Savings Account (Owner: SP)

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. Morgan McGarvey , 05/14/2026