



Filing ID #10076120

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Neal Patrick MD, Facs Dunn
Status: Member
State/District: FL02

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/13/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cadence Checking Account [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	☐
IRA #1 ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
IRA #1 ⇒ iShares A.I. Innovation and Tech Active ETF (BAI) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
IRA #1 ⇒ iShares Bitcoin Trust ETF (IBIT) [OT] DESCRIPTION: ETF	SP	\$15,001 - \$50,000	Tax-Deferred		☒
IRA #1 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
IRA #1 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
IRA #1 ⇒ iShares Core Universal USD Bond ETF (IUSB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
IRA #1 ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Gold Trust Shares (IAU) [EF]					☐
IRA #1 ⇒ iShares International Aggregate Bond Fund (IAGG) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
IRA #1 ⇒ iShares MBS ETF (MBB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
IRA #1 ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
IRA #1 ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
IRA #1 ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
IRA #1 ⇒ iShares S&P 100 Fund (OEF) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
IRA #1 ⇒ iShares S&P 500 Growth ETF (IVW) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
IRA #1 ⇒ iShares S&P 500 Value ETF (IVE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
IRA #1 ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
IRA #1 ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
IRA #1 ⇒ iShares U.S. Thematic Rotation Active ETF (THRO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
IRA #1 ⇒ Morgan Stanley Sweep Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
IRA #2 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
IRA #2 ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA #2 ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒
IRA #2 ⇒ iShares S&P 100 Fund (OEF) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
IRA #2 ⇒ iShares S&P 500 Growth ETF (IVW) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒
IRA #2 ⇒ iShares S&P 500 Value ETF (IVE) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒
IRA #2 ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒
IRA #3 ⇒ Alerian MLP ETF (AMLP) [EF]		\$100,001 - \$250,000	Tax-Deferred		☒
IRA #3 ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$250,001 - \$500,000	Tax-Deferred		☐
IRA #3 ⇒ AT&T Inc 5.00% Depositary Shares Perpetual Preferred Stock Series A (T.A) [OT] DESCRIPTION: Preferred stock		\$15,001 - \$50,000	Tax-Deferred		☐
IRA #3 ⇒ Cadence Bank 5.50% Series A Non-Cumulative Perpetual Preferred Stock (CADE.A) [OT] DESCRIPTION: Preferred stock		\$50,001 - \$100,000	Tax-Deferred		☐
IRA #3 ⇒ Capital One Fin. Corp. 5.00% Fixed Rate Non-Cumulative Perpetual Preferred Stock, Series I (COF.I) [OT] DESCRIPTION: Preferred stock		\$50,001 - \$100,000	Tax-Deferred		☒
IRA #3 ⇒ Flaherty & Crumrine Dynamic PF (DFP) [OT] DESCRIPTION: ETF		\$50,001 - \$100,000	Tax-Deferred		☐
IRA #3 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$500,001 - \$1,000,000	Tax-Deferred		☒
IRA #3 ⇒ iShares Biotechnology ETF (IBB) [EF]		\$100,001 - \$250,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA #3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$250,001 - \$500,000	Tax-Deferred		☒
IRA #3 ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
IRA #3 ⇒ iShares Russell 2000 Index Fund (IWM) [EF]		\$100,001 - \$250,000	Tax-Deferred		☒
IRA #3 ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF]		\$250,001 - \$500,000	Tax-Deferred		☐
IRA #3 ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
IRA #3 ⇒ JPMorgan Chase & Co 4.75% Depositary Shares Non-Cumulative Preferred Stock, Series GG (JPM.J) [OT]		\$50,001 - \$100,000	Tax-Deferred		☐
DESCRIPTION: Preferred stock					
IRA #3 ⇒ KeyCorp 5.65% Fixed Rate Perpetual Non-Cumulative Preferred Stock, Series F (KEY.J) [OT]		\$50,001 - \$100,000	Tax-Deferred		☐
DESCRIPTION: Preferred stock					
IRA #3 ⇒ Morgan Stanley Sweep Account [BA]		\$15,001 - \$50,000	Tax-Deferred		☐
IRA #3 ⇒ Regions Financial Corp. 4.45% Depositary Shares Series E Non-Cumulative Preferred Stock (RF.E) [OT]		\$50,001 - \$100,000	Tax-Deferred		☐
DESCRIPTION: Preferred stock					
IRA #3 ⇒ T. Rowe Price Capital Appreciation Fund (PRWCX) [MF]		\$250,001 - \$500,000	Tax-Deferred		☒
IRA #3 ⇒ Truist Fin. Corp 4.75% Depositary Shares Series R Non-Cumulative Perpetual Preferred Stock (TFC.R) [OT]		\$15,001 - \$50,000	Tax-Deferred		☐
DESCRIPTION: Preferred stock					
IRA #3 ⇒ US Bancorp Non-Cumulative Perpetual Preferred Stock, Series K (USB.P) [OT]		\$50,001 - \$100,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Preferred stock					
IRA #3 ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]		\$250,001 - \$500,000	Tax-Deferred		☒
IRA #3 ⇒ Vanguard Value ETF (VTV) [EF]		\$50,001 - \$100,000	Tax-Deferred		☐
IRA #3 ⇒ Wells Fargo & Company 5.625% Non-Cumulative Perpetual Class A Preferred Stock, Series Y (WFC.Y) [OT]		\$50,001 - \$100,000	Tax-Deferred		☐
DESCRIPTION: Preferred stock					
NP Dunn TLF Pledge ⇒ Bank of America Sweep Account [BA]		\$1,001 - \$15,000	None		☐
NP Dunn TLF Pledge ⇒ Fidelity Nasdaq Composite Index ETF (ONEQ) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
NP Dunn TLF Pledge ⇒ Invesco Preferred ETF (PGX) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☒
NP Dunn TLF Pledge ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	☒
NP Dunn TLF Pledge ⇒ iShares Biotechnology ETF (IBB) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
NP Dunn TLF Pledge ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☒
NP Dunn TLF Pledge ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	☒
NP Dunn TLF Pledge ⇒ iShares Russell 2000 Index Fund (IWM) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☒
NP Dunn TLF Pledge ⇒ Schwab U.S. Small-Cap ETF (SCHX) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
NP Dunn TLF Pledge ⇒ VanEck IG Floating Rate ETF (FLTR) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☒
NP Dunn TLF Pledge ⇒		\$50,001 -	Dividends	\$1,001 -	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard High Dividend Yield ETF (VYM) [EF]		\$100,000		\$2,500	☐
NP Dunn TLF Pledge ⇒ Vanguard International High Dividend Yield ETF (VYMI) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
NP Dunn TLF Pledge ⇒ Vanguard Value ETF (VTV) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☒
NP Dunn TLF Pledge ⇒ Vanguard Value ETF (VTV) [EF]		\$50,001 - \$100,000	None		☒
NP Dunn Tst Cadence Pldg ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$250,001 - \$500,000	Dividends	\$201 - \$1,000	☒
NP Dunn Tst Cadence Pldg ⇒ iShares Biotechnology ETF (IBB) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☒
NP Dunn Tst Cadence Pldg ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	☒
NP Dunn Tst Cadence Pldg ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	☒
NP Dunn Tst Cadence Pldg ⇒ iShares Russell 2000 Index Fund (IWM) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	☒
NP Dunn Tst Cadence Pldg ⇒ Morgan Stanley Sweep Account [BA]		\$15,001 - \$50,000	None		☐
NP Dunn Tst Cadence Pldg ⇒ VanEck IG Floating Rate ETF (FLTR) [EF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	☒
NP Dunn Tst Cadence Pldg ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☒
NP Dunn Tst Cadence Pldg ⇒ Vanguard International High Dividend Yield ETF (VYMI) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
NP Dunn Tst Cadence Pldg ⇒ Vanguard Value ETF (VTV) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☒

* 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?
IRA #3 ⇒ Capital One Financial Corporation Depositary shares each representing a 1/40th interest in a share of Fixed Rate Non-Cumulative Perpetual Preferred Stock, Series I of the Issuer (COF\$I) [ST]		03/03/2025	P	\$1,001 - \$15,000	
IRA #3 ⇒ Capital One Financial Corporation Depositary shares each representing a 1/40th interest in a share of Fixed Rate Non-Cumulative Perpetual Preferred St (COF\$I) [ST]		06/02/2025	P	\$1,001 - \$15,000	
IRA #2 ⇒ J P Morgan Chase & Co Depositary Shares, each representing a 1/400th interest in a share of JPMorgan Chase & Co. 4.75% Non-Cumulative Preferred Stock, Series GG (JPM\$J) [ST]		09/04/2025	S (partial)	\$1,001 - \$15,000	☐
NP Dunn Tst Cadence Pldg ⇒ Vanguard Value ETF (VTV) [EF]		05/08/2025	P	\$1,001 - \$15,000	
NP Dunn Tst Cadence Pldg ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		05/08/2023	P	\$1,001 - \$15,000	
NP Dunn Tst Cadence Pldg ⇒ iShares Core S&P 500 ETF (IVV) [EF]		05/08/2023	P	\$15,001 - \$50,000	
NP Dunn Tst Cadence Pldg ⇒ iShares Russell 2000 Index Fund (IWM) [EF]		05/08/2025	P	\$1,001 - \$15,000	
NP Dunn Tst Cadence Pldg ⇒ iShares Biotechnology ETF (IBB) [EF]		05/08/2025	S (partial)	\$15,001 - \$50,000	☐
NP Dunn Tst Cadence Pldg ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		05/08/2025	S (partial)	\$1,001 - \$15,000	☐
NP Dunn Tst Cadence Pldg ⇒ Vanguard International High Dividend Yield ETF (VYMI) [EF]		05/08/2025	S (partial)	\$1,001 - \$15,000	☒
NP Dunn Tst Cadence Pldg ⇒ VanEck IG Floating Rate ETF (FLTR) [EF]		05/08/2025	S (partial)	\$1,001 - \$15,000	☐
NP Dunn TLF Pledge ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		04/15/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
NP Dunn TLF Pledge ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		04/15/2025	P	\$15,001 - \$50,000	
NP Dunn TLF Pledge ⇒ iShares Russell 2000 Index Fund (IWM) [EF]		04/15/2025	P	\$15,001 - \$50,000	
NP Dunn TLF Pledge ⇒ Fidelity Nasdaq Composite Index ETF (ONEQ) [EF]		04/15/2025	S	\$15,001 - \$50,000	☐
NP Dunn TLF Pledge ⇒ Invesco Preferred ETF (PGX) [EF]		04/15/2025	S (partial)	\$15,001 - \$50,000	☐
NP Dunn TLF Pledge ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		04/15/2025	S (partial)	\$15,001 - \$50,000	☐
NP Dunn TLF Pledge ⇒ Fidelity Nasdaq Composite Index ETF (ONEQ) [EF]		03/13/2025	P	\$15,001 - \$50,000	
NP Dunn TLF Pledge ⇒ Invesco Preferred ETF (PGX) [EF]		03/13/2025	P	\$15,001 - \$50,000	
NP Dunn TLF Pledge ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		03/13/2025	P	\$15,001 - \$50,000	
NP Dunn TLF Pledge ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		03/13/2025	S (partial)	\$15,001 - \$50,000	☐
NP Dunn TLF Pledge ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		03/13/2025	S (partial)	\$15,001 - \$50,000	☐
NP Dunn TLF Pledge ⇒ iShares Russell 2000 Index Fund (IWM) [EF]		03/13/2025	S (partial)	\$15,001 - \$50,000	☐
NP Dunn TLF Pledge ⇒ iShares Biotechnology ETF (IBB) [EF]		02/13/2025	P	\$1,001 - \$15,000	
NP Dunn TLF Pledge ⇒ iShares Russell 2000 Index Fund (IWM) [EF]		02/13/2025	P	\$1,001 - \$15,000	
NP Dunn TLF Pledge ⇒ VanEck IG Floating Rate ETF (FLTR) [EF]		02/13/2025	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
NP Dunn TLF Pledge ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		02/13/2025	S (partial)	\$50,001 - \$100,000	☐
NP Dunn TLF Pledge ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		02/13/2025	S (partial)	\$1,001 - \$15,000	☐
NP Dunn TLF Pledge ⇒ iShares Core S&P 500 ETF (IVV) [EF]		02/13/2023	S (partial)	\$1,001 - \$15,000	☐
NP Dunn TLF Pledge ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		07/15/2025	P	\$15,001 - \$50,000	
IRA #1 ⇒ iShares U.S. Thematic Rotation Active ETF (THRO) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares Gold Trust Shares (IAU) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]	SP	09/02/2025	P	\$15,001 - \$50,000	
IRA #1 ⇒ iShares A.I. Innovation and Tech Active ETF (BAI) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares International Aggregate Bond Fund (IAGG) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	09/02/2025	P	\$15,001 - \$50,000	
IRA #2 ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]		09/04/2025	P	\$1,001 - \$15,000	
IRA #2 ⇒ JPMorgan Chase & Co 4.75% Depositary Shares Non-Cumulative Preferred Stock, Series GG (JPM.J) [OT] LOCATION: US DESCRIPTION: Preferred stock		09/04/2025	S (partial)	\$1,001 - \$15,000	☐
IRA #2 ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]		09/04/2025	P	\$1,001 - \$15,000	
IRA #2 ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF]		09/04/2025	S (partial)	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA #2 ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]		09/04/2025	P	\$1,001 - \$15,000	
IRA #2 ⇒ iShares S&P 500 Value ETF (IVE) [EF]		09/04/2025	P	\$1,001 - \$15,000	
IRA #2 ⇒ iShares S&P 500 Growth ETF (IVW) [EF]		09/04/2025	P	\$1,001 - \$15,000	
IRA #2 ⇒ iShares Core S&P 500 ETF (IVV) [EF]		09/04/2025	P	\$1,001 - \$15,000	
IRA #3 ⇒ T. Rowe Price Capital Appreciation Fund (PRWCX) [OT] LOCATION: US DESCRIPTION: Mutual fund		12/18/2025	P	\$15,001 - \$50,000	
IRA #3 ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]		03/25/2025	P	\$1,001 - \$15,000	
IRA #3 ⇒ Alerian MLP ETF (AMLP) [EF]		02/18/2025	P	\$1,001 - \$15,000	
IRA #3 ⇒ Alerian MLP ETF (AMLP) [EF]		01/06/2025	P	\$15,001 - \$50,000	
IRA #3 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		01/06/2025	P	\$50,001 - \$100,000	
IRA #3 ⇒ iShares Core S&P 500 ETF (IVV) [EF]		01/06/2025	P	\$250,001 - \$500,000	
IRA #3 ⇒ iShares Russell 2000 Index Fund (IWM) [EF]		01/06/2025	P	\$15,001 - \$50,000	
IRA #3 ⇒ State Street SPDR Bloomberg 1-3 Month T-Bill ETF (BIL) [EF]		01/06/2025	S	\$250,001 - \$500,000	☐
IRA #3 ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]		06/24/2025	P	\$1,001 - \$15,000	
IRA #3 ⇒		05/19/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Alerian MLP ETF (AMLP) [EF]					
IRA #3 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		04/30/2025	P	\$1,001 - \$15,000	
NP Dunn TLF Pledge ⇒ Invesco Preferred ETF (PGX) [EF]		07/15/2025	S (partial)	\$15,001 - \$50,000	☐
NP Dunn TLF Pledge ⇒ Invesco Preferred ETF (PGX) [EF]		06/12/2025	P	\$15,001 - \$50,000	
NP Dunn TLF Pledge ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		06/12/2025	S (partial)	\$15,001 - \$50,000	☐
NP Dunn TLF Pledge ⇒ Vanguard Value ETF (VTV) [EF]		05/08/2025	P	\$1,001 - \$15,000	
NP Dunn TLF Pledge ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		05/08/2025	P	\$1,001 - \$15,000	
NP Dunn TLF Pledge ⇒ iShares Core S&P 500 ETF (IVV) [EF]		05/08/2025	P	\$15,001 - \$50,000	
NP Dunn TLF Pledge ⇒ iShares Russell 2000 Index Fund (IWM) [EF]		05/08/2025	P	\$1,001 - \$15,000	
NP Dunn TLF Pledge ⇒ iShares Biotechnology ETF (IBB) [EF]		05/08/2025	S (partial)	\$15,001 - \$50,000	☐
NP Dunn Tst Cadence Pldg ⇒ iShares Biotechnology ETF (IBB) [EF]		02/03/2025	P	\$1,001 - \$15,000	
NP Dunn Tst Cadence Pldg ⇒ iShares Russell 2000 Index Fund (IWM) [EF]		02/13/2025	P	\$1,001 - \$15,000	
NP Dunn Tst Cadence Pldg ⇒ VanEck IG Floating Rate ETF (FLTR) [EF]		02/13/2025	P	\$50,001 - \$100,000	
NP Dunn Tst Cadence Pldg ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]		02/13/2025	S (partial)	\$1,001 - \$15,000	☐
NP Dunn Tst Cadence Pldg ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		02/13/2025	S (partial)	\$50,001 - \$100,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
NP Dunn Tst Cadence Pldg ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		02/13/2025	S (partial)	\$1,001 - \$15,000	☐
NP Dunn Tst Cadence Pldg ⇒ iShares Core S&P 500 ETF (IVV) [EF]		02/13/2025	S (partial)	\$1,001 - \$15,000	☐
NP Dunn TLF Pledge ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		05/08/2025	S (partial)	\$1,001 - \$15,000	☐
NP Dunn TLF Pledge ⇒ Vanguard International High Dividend Yield ETF (VYMI) [EF]		05/08/2025	S (partial)	\$1,001 - \$15,000	☐
NP Dunn TLF Pledge ⇒ VanEck IG Floating Rate ETF (FLTR) [EF]		05/08/2025	S (partial)	\$1,001 - \$15,000	☐
IRA #1 ⇒ iShares Core Total USD Bond Market ETF (IUSB) [EF]	SP	09/02/2025	P	\$15,001 - \$50,000	
IRA #1 ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	09/02/2025	P	\$15,001 - \$50,000	
IRA #1 ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]	SP	09/02/2025	S	\$15,001 - \$50,000	☐
IRA #1 ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	09/02/2025	S (partial)	\$50,001 - \$100,000	☐
IRA #1 ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	SP	09/02/2025	P	\$15,001 - \$50,000	
IRA #1 ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares Russell 2000 Index Fund (IWM) [EF]	SP	09/02/2025	S	\$15,001 - \$50,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA #1 ⇒ iShares S&P 500 Value ETF (IVE) [EF]	SP	09/02/2025	P	\$15,001 - \$50,000	
IRA #1 ⇒ iShares S&P 500 Growth ETF (IVW) [EF]	SP	09/02/2025	P	\$15,001 - \$50,000	
IRA #1 ⇒ iShares S&P 100 Fund (OEF) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares U.S. Technology ETF (IYW) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	09/02/2025	S (partial)	\$1,001 - \$15,000	☐
IRA #1 ⇒ iShares Biotechnology ETF (IBB) [EF]	SP	09/02/2025	S (partial)	\$15,001 - \$50,000	☐
IRA #1 ⇒ Vanguard Value ETF (VTV) [EF]	SP	09/02/2025	S	\$15,001 - \$50,000	☐
IRA #1 ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	SP	09/02/2025	S	\$50,001 - \$100,000	☐
IRA #1 ⇒ iShares MBS ETF (MBB) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	08/26/2025	S (partial)	\$15,001 - \$50,000	☐
IRA #1 ⇒ iShares Bitcoin Trust ETF (IBIT) [OT] LOCATION: US DESCRIPTION: ETF	SP	09/05/2025	P	\$15,001 - \$50,000	
IRA #1 ⇒ iShares Bitcoin Trust ETF (IBIT) [OT] LOCATION: US DESCRIPTION: ETF	SP	08/27/2025	P	\$15,001 - \$50,000	
IRA #1 ⇒ iShares Gold Trust Shares (IAU) [EF]	SP	09/16/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA #1 ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]	SP	09/16/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares A.I. Innovation and Tech Active ETF (BAI) [EF]	SP	09/16/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	09/16/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares Core Total USD Bond Market ETF (IUSB) [EF]	SP	09/16/2025	S	\$1,001 - \$15,000	☐
IRA #1 ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	09/16/2025	S (partial)	\$1,001 - \$15,000	☐
IRA #1 ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF]	SP	09/16/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF]	SP	09/16/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	SP	09/16/2025	S (partial)	\$1,001 - \$15,000	☐
IRA #1 ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]	SP	09/16/2025	S (partial)	\$1,001 - \$15,000	☐
IRA #1 ⇒ iShares S&P 100 Fund (OEF) [EF]	SP	09/16/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares U.S. Technology ETF (IYW) [EF]	SP	09/16/2025	S	\$1,001 - \$15,000	☐
IRA #1 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	11/18/2025	P	\$1,001 - \$15,000	
IRA #1 ⇒ iShares Core Universal USD Bond ETF (IUSB) [EF]	SP	11/18/2025	S (partial)	\$1,001 - \$15,000	☐
IRA #1 ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	11/18/2025	S (partial)	\$15,001 - \$50,000	☐
IRA #1 ⇒	SP	11/18/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares MSCI USA Momentum Factor ETF (MTUM) [EF]					
IRA #1 ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	SP	11/18/2025	S (partial)	\$1,001 - \$15,000	☐
IRA #1 ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]	SP	11/18/2025	S (partial)	\$1,001 - \$15,000	☐
IRA #1 ⇒ iShares S&P 500 Value ETF (IVE) [EF]	SP	11/18/2025	P	\$1,001 - \$15,000	

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Morgan Stanley	Spouse IRA Distribution	N/A
Morgan Stanley	IRA Distribution	\$24,231.60

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
PARTNER	PATIENT PRACTIONERS, LLC
PARTNER	WORLDWIDE EQUINE IMAGING, LLC
PARTNER	GLOBAL CT & PET IMAGING, LLC
PARTNER	GULF RESOURCES, LLC
PRINCIPAL	NEAL P. DUNN CONSULTING

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 Aspen Institute, Inc.	05/26/2025	05/31/2025	Washington, D.C. - Malaga and Seville, Spain - Washington, D.C.	0	☒	☒	☒

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

◦ IRA #3 DESCRIPTION: Held at Morgan Stanley ◦ IRA #1 (Owner: SP) DESCRIPTION: Held at Morgan Stanley ◦ NP Dunn Tst Cadence Pldg LOCATION: US ◦ IRA #2 DESCRIPTION: Held at Morgan Stanley ◦ NP Dunn TLF Pledge

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. Neal Patrick MD, Facs Dunn , 08/13/2026