Filing ID #10076814

Financial Disclosure Report

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

Filer Information

Name: Hon. Joe Courtney
Status: Member
State/District: CT02

Filing Information

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 05/14/2026

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
M&T Bank Accounts [BA]		$15,001 - $50,000	None		☐
Mass Mutual Whole Life Policy [WU]		$15,001 - $50,000	None		☐
Saint Francis Hospital and Medical Center Pension Plan [PE]		Undetermined	Distribution	$5,001 - $15,000	☐
Hartford Healthcare 401k ⇒ American Funds 2025 Target Date Retirement Fd Cl R-6 (RFDTX) [MF] Description: This asset was inadvertently omitted from prior reports	SP	$15,001 - $50,000	Tax-Deferred		☐
Inherited Brokerage Account ⇒ Invesco National AMT-Free Municipal Bond ETFo (PZA) [EF]	SP	None	Dividends	$1 - $200	☑
Inherited Brokerage Account ⇒ iShares 0-3 Month Treasury Bond ETF (SGOV) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Inherited Brokerage Account ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Inherited Brokerage Account ⇒	SP	$15,001 - $50,000	Capital Gains,	$201 -	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
iShares Core MSCI EAFE ETF (IEFA) [EF]			Dividends	$1,000	
Inherited Brokerage Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	$15,001 - $50,000	Capital Gains, Dividends	$5,001 - $15,000	✓
Inherited Brokerage Account ⇒ iShares Gold Trust Shares (IAU) [EF]	SP	$1,001 - $15,000	Dividends	None	✓
Inherited Brokerage Account ⇒ iShares MBS ETF (MBB) [EF]	SP	$1,001 - $15,000	Interest	$1 - $200	✓
Inherited Brokerage Account ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]	SP	None	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	
Inherited Brokerage Account ⇒ iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]	SP	None	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	✓
Inherited Brokerage Account ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	$1 - $1,000	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ iShares S&P 100 ETF (OEF) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	
Inherited Brokerage Account ⇒ iShares S&P 500 Growth ETF (IVW) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ iShares Short-Term National Muni Bond ETF (SUB) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]	SP	None	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ Materials Select Sector SPDR (XLB) [EF]	SP	None	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]	SP	$15,001 - $50,000	Capital Gains, Dividends	$1,001 - $2,500	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Inherited Brokerage Account ⇒ SPDR Nuveen Bloomberg Short Term Municipal Bond ETF (SHM) [EF]	SP	$1,001 - $15,000	Interest	$1 - $200	✓
Inherited Brokerage Account ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]	SP	None	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF] DESCRIPTION: Asset sold below reportable transaction threshold.	SP	None	Dividends	$1 - $200	
Inherited Brokerage Account ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	✓
Inherited Brokerage Account ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	None	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]	SP	None	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF]	SP	$1,001 - $15,000	Dividends	None	✓
Inherited Brokerage Account ⇒ State Street Consumer Discretionary Select Sector SPDR ETF (XLY) [EF]	SP	$1,001 - $15,000	Capital Gains	$201 - $1,000	✓
Inherited Brokerage Account ⇒ State Street Industrial Select Sector SPDR ETF (XLI) [EF]	SP	$1,001 - $15,000	Dividends	None	✓
Inherited Brokerage Account ⇒ State Street SPDR Nuveen ICE Municipal Bond ETF (TFI) [EF]	SP	$50,001 - $100,000	Dividends	$1,001 - $2,500	✓
Inherited Brokerage Account ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Inherited Brokerage Account ⇒ Sweep Account [IH]	SP	$1,001 - $15,000	Interest	None	
Inherited Brokerage Account ⇒ Vanguard Mid-Cap ETF (VO) [EF]	SP	$1,001 - $15,000	Dividends	None	✓
Inherited Brokerage Account ⇒ Vanguard Russell 1000 Growth ETF (VONG) [EF]	SP	$1,001 - $15,000	Dividends	None	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Inherited Brokerage Account ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]	SP	None	Dividends	$1 - $200	☑
Inherited Brokerage Account ⇒ Vanguard Short-Term Bond ETF (BSV) [EF]	SP	$1,001 - $15,000	Dividends	None	☑
Inherited Brokerage Account ⇒ Vanguard Utilities ETF (VPU) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☐
Inherited IRA ⇒ BlackRock High Yield Portfolio - Institutional (BHYIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Inherited IRA ⇒ Causeway Emerging Markets Fund Insti Cl (CEMIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Cohen & Steers Preferred Securities and Income Fund Inc. Class I (CPXIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Cohen & Steers Real Estate Securities Fund, Inc. Class I (CSDIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Deposit Sweep Account [BA]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Global X MLP ETF (MLPA) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ High Income Fund - I Class (AHIIX) [MF]	SP	None	Tax-Deferred		☑
Inherited IRA ⇒ Invesco Preferred ETF (PGX) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Invesco RAFI Developed Markets ex-U.S. ETF (PXF) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Invesco Senior Loan ETF (BKLN) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Inherited IRA ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Inherited IRA ⇒ iShares International Select Dividend ETF (IDV) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Inherited IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Loomis Sayles Senior Floating Rate and Fixed Income Fd Cl Y (LSFYX) [MF]	SP	None	Tax-Deferred		☑
Inherited IRA ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Inherited IRA ⇒ T. Rowe Price Floating Rate Fund, Inc. (PRFRX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Vanguard Emerging Markets Bond Fund Admiral Shares (VEGBX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Inherited IRA ⇒ Vanguard International High Dividend Yield ETF (VYMI) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Vanguard Total World Stock Index ETF (VT) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
IRA ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF]		None	Tax-Deferred		☑
IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		$15,001 - $50,000	Tax-Deferred		☑
IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		$15,001 - $50,000	Tax-Deferred		☑
IRA ⇒ J.P. Morgan Exchange-Traded Fund Trust JPMorgan Active Growth ETF (JGRO) [EF]		$15,001 - $50,000	Tax-Deferred		☑
IRA ⇒		$50,001 -	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
J.P. Morgan Exchange-Traded Fund Trust JPMorgan International Research Enhanced Equity ETF (JIRE) [EF]		$100,000			
IRA ⇒ JPMorgan Active Bond ETF (JBND) [EF]		$50,001 - $100,000	Tax-Deferred		✓
IRA ⇒ JPMorgan Active Value ETF (JAVA) [EF]		$15,001 - $50,000	Tax-Deferred		✓
IRA ⇒ JPMorgan ActiveBuilders Emerging Markets Equity ETF (JEMA) [EF]		$15,001 - $50,000	Tax-Deferred		✓
IRA ⇒ JPMorgan BetaBuilders International Equity ETF (BBIN) [EF]		None	Tax-Deferred		✓
IRA ⇒ JPMorgan BetaBuilders U.S. Equity ETF (BBUS) [EF]		$100,001 - $250,000	Tax-Deferred		✓
IRA ⇒ JPMorgan BetaBuilders U.S. Mid Cap Equity ETF (BBMC) [EF]		None	Tax-Deferred		✓
IRA ⇒ JPMorgan BetaBuilders USD High Yield Corporate Bond ETF (BBHY) [EF]		$1,001 - $15,000	Tax-Deferred		✓
IRA ⇒ JPMorgan Core Plus Bond ETF (JCPB) [EF]		$50,001 - $100,000	Tax-Deferred		✓
IRA ⇒ JPMorgan Global Select Equity ETF (JGLO) [EF]		$15,001 - $50,000	Tax-Deferred		✓
IRA ⇒ JPMorgan Income ETF (JPIE) [EF]		$15,001 - $50,000	Tax-Deferred		✓
IRA ⇒ JPMorgan International Growth ETF (JIG) [EF]		$1,001 - $15,000	Tax-Deferred		✓
IRA ⇒ JPMorgan International Value ETF (JIVE) [EF]		$15,001 - $50,000	Tax-Deferred		✓
IRA ⇒ Sweep Account [BA]		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
IRA ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		$1,001 - $15,000	Tax-Deferred		☐
IRA ⇒ Vanguard International High Dividend Yield ETF (VYMI) [EF]		None	Tax-Deferred		☑
Rollover IRA ⇒ AB Sustainable Global Thematic Fund - ADV (ATEYX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Rollover IRA ⇒ Calvert Green Bond Fund Class I (CGBIX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Rollover IRA ⇒ Calvert Income Fund Class I (CINCX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Rollover IRA ⇒ Calvert US Large Cap Value [MF]	SP	None	Tax-Deferred		☑
Rollover IRA ⇒ Federated Hermes SDG Engagement Equity Fund IS Class (FHESX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Rollover IRA ⇒ Federated Hermes SDG Engagement High Yield Credit Fund IS Class (FHHIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Rollover IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF] DESCRIPTION: Listed on prior reports as IShares Inc IShares ESG	SP	$1,001 - $15,000	Tax-Deferred		☐
Rollover IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Rollover IRA ⇒ Large Cap Equity Fund - I Class (AFEIX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Rollover IRA ⇒ Mirova Global Megatrends Fund Class Y (ESGYX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Rollover IRA ⇒ Sweep Account [BA]	SP	$1,001 - $15,000	Tax-Deferred		☐
Rollover IRA ⇒ UBS Engage For Impact Fund Class P2 (EIPTX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Rollover IRA ⇒ UBS International Sustainable Equity Fund Class P2 (ESPTX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		✓
Rollover IRA ⇒ UBS Sustainable Development Bank Bond Fund Class P2 (UDBTX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		✓
Rollover IRA ⇒ Victory Pioneer Global Equity Fund Class Y (PGSYX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		✓
TR 403(b) ⇒ T. Rowe Price Retirement 2025 [MF]	SP	$100,001 - $250,000	Tax-Deferred		

* 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 ⇒ JPMorgan BetaBuilders International Equity ETF (BBIN) [EF]		09/26/2025	S	$50,001 - $100,000	
IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		12/18/2025	S (partial)	$15,001 - $50,000	
IRA ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF]		12/18/2025	S	$15,001 - $50,000	
IRA ⇒ JPMorgan BetaBuilders USD High Yield Corporate Bond ETF (BBHY) [EF]		04/08/2025	S (partial)	$15,001 - $50,000	
IRA ⇒ JPMorgan Global Select Equity ETF (JGLO) [EF]		09/26/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		06/26/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ JPMorgan Income ETF (JPIE) [EF]		04/08/2025	S (partial)	$1,001 - $15,000	
IRA ⇒		04/25/2025	S	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
iShares 10-20 Year Treasury Bond ETF (TLH) [EF]			(partial)		
IRA ⇒ JPMorgan BetaBuilders USD High Yield Corporate Bond ETF (BBHY) [EF]		04/25/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ JPMorgan Active Value ETF (JAVA) [EF]		03/28/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ Vanguard International High Dividend Yield ETF (VYMI) [EF]		09/26/2025	S	$1,001 - $15,000	
IRA ⇒ JPMorgan Income ETF (JPIE) [EF]		11/24/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ JPMorgan BetaBuilders U.S. Mid Cap Equity ETF (BBMC) [EF]		02/06/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ JPMorgan BetaBuilders U.S. Mid Cap Equity ETF (BBMC) [EF]		03/28/2025	S	$1,001 - $15,000	
IRA ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF]		02/06/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ JPMorgan BetaBuilders U.S. Equity ETF (BBUS) [EF]		04/25/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF]		09/26/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ JPMorgan ActiveBuilders Emerging Markets Equity ETF (JEMA) [EF]		09/26/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ JPMorgan Active Value ETF (JAVA) [EF]		06/25/2026	S (partial)	$1,001 - $15,000	
IRA ⇒ JPMorgan Active Growth ETF (JGRO) [EF]		09/26/2025	S (partial)	$1,001 - $15,000	
IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		09/26/2025	S (partial)	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
IRA ⇒ JPMorgan Global Select Equity ETF (JGLO) [EF]		02/06/2025	P	$1,001 - $15,000	
IRA ⇒ JPMorgan ActiveBuilders Emerging Markets Equity ETF (JEMA) [EF]		11/24/2025	P	$1,001 - $15,000	
IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		09/26/2025	P	$1,001 - $15,000	
IRA ⇒ JPMorgan International Research Enhanced Equity ETF (JIRE) [EF]		04/25/2025	P	$1,001 - $15,000	
IRA ⇒ JPMorgan Income ETF (JPIE) [EF]		09/26/2025	P	$1,001 - $15,000	
IRA ⇒ JPMorgan BetaBuilders U.S. Equity ETF (BBUS) [EF]		11/24/2025	P	$1,001 - $15,000	
IRA ⇒ JPMorgan Income ETF (JPIE) [EF]		02/06/2025	P	$1,001 - $15,000	
IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		02/06/2025	P	$1,001 - $15,000	
IRA ⇒ JPMorgan Active Growth ETF (JGRO) [EF]		06/26/2025	P	$1,001 - $15,000	
IRA ⇒ JPMorgan Core Plus Bond ETF (JCPB) [EF]		09/26/2025	P	$1,001 - $15,000	
IRA ⇒ JPMorgan Core Plus Bond ETF (JCPB) [EF]		03/28/2025	P	$1,001 - $15,000	
IRA ⇒ JPMorgan Active Growth ETF (JGRO) [EF]		03/28/2025	P	$1,001 - $15,000	
IRA ⇒ JPMorgan BetaBuilders USD High Yield Corporate Bond ETF (BBHY) [EF]		06/26/2025	P	$1,001 - $15,000	
IRA ⇒		09/26/2025	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
JPMorgan International Value ETF (JIVE) [EF]					
IRA ⇒ JPMorgan International Growth ETF (JIG) [EF]		09/26/2025	P	$1,001 - $15,000	
IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		04/25/2025	P	$15,001 - $50,000	
IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		04/08/2025	P	$15,001 - $50,000	
IRA ⇒ JPMorgan International Research Enhanced Equity ETF (JIRE) [EF]		09/26/2025	P	$15,001 - $50,000	
IRA ⇒ JPMorgan Active Bond ETF (JBND) [EF]		12/18/2025	P	$50,001 - $100,000	
Inherited IRA ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	SP	11/24/2025	S (partial)	$1,001 - $15,000	☐
Inherited IRA ⇒ High Income Fund - Investor Class (AHIVX) [MF]	SP	03/21/2025	S	$1,001 - $15,000	☐
Inherited IRA ⇒ High Income Fund - Investor Class (AHIVX) [MF]	SP	03/20/2025	S (partial)	$1,001 - $15,000	☐
Inherited IRA ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	SP	10/20/2025	S (partial)	$1,001 - $15,000	☐
Inherited IRA ⇒ Loomis Sayles Senior Floating Rate and Fixed Income Fd Cl Y (LSFYX) [MF]	SP	04/30/2025	S	$1,001 - $15,000	☐
Inherited IRA ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]	SP	04/09/2025	S (partial)	$1,001 - $15,000	☐
Inherited IRA ⇒ iShares International Select Dividend ETF (IDV) [EF]	SP	08/12/2025	S (partial)	$1,001 - $15,000	☐
Inherited IRA ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	SP	04/09/2025	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Inherited IRA ⇒ Vanguard Total World Stock Index ETF (VT) [EF]	SP	10/20/2025	P	$1,001 - $15,000	
Inherited IRA ⇒ Invesco Senior Loan ETF (BKLN) [EF]	SP	04/30/2025	P	$1,001 - $15,000	
Inherited IRA ⇒ BlackRock High Yield Portfolio - Class A (BHYAX) [MF]	SP	03/21/2026	P	$1,001 - $15,000	
Inherited IRA ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]	SP	11/24/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ Invesco National AMT-Free Municipal Bond ETFo (PZA) [EF]	SP	07/29/2025	S	$15,001 - $50,000	☐
Inherited Brokerage Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	07/29/2025	S (partial)	$15,001 - $50,000	☑
Inherited Brokerage Account ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]	SP	04/09/2025	S	$15,001 - $50,000	☐
Inherited Brokerage Account ⇒ iShares U.S. Equity Factor Rotation Active ETF (DYNF) [EF]	SP	04/09/2025	S	$15,001 - $50,000	☐
Inherited Brokerage Account ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	07/29/2025	S (partial)	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]	SP	07/29/2025	S (partial)	$1,001 - $15,000	☑
Inherited Brokerage Account ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	07/29/2025	S (partial)	$1,001 - $15,000	☑
Inherited Brokerage Account ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]	SP	04/09/2025	S	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒ iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]	SP	07/29/2025	S	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒ iShares S&P 500 Growth ETF (IVW) [EF]	SP	04/09/2025	S (partial)	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒	SP	03/11/2025	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
iShares 0-3 Month Treasury Bond ETF (SGOV) [EF]			(partial)		
Inherited Brokerage Account ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]	SP	07/29/2025	S (partial)	$1,001 - $15,000	✓
Inherited Brokerage Account ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]	SP	05/27/2025	S (partial)	$1,001 - $15,000	
Inherited Brokerage Account ⇒ iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]	SP	01/09/2025	S (partial)	$1,001 - $15,000	
Inherited Brokerage Account ⇒ State Street Utilities Select Sector SPDR ETF (XLU) [EF]	SP	04/09/2025	S	$1,001 - $15,000	
Inherited Brokerage Account ⇒ iShares Short-Term National Muni Bond ETF (SUB) [EF]	SP	10/20/2025	S (partial)	$1,001 - $15,000	
Inherited Brokerage Account ⇒ State Street Consumer Discretionary Select Sector SPDR ETF (XLY) [EF]	SP	07/29/2025	S	$1,001 - $15,000	
Rollover IRA ⇒ Calvert U.S. Large Cap Value Responsible Index Fund Class A (CFJAX) [MF]	SP	04/01/2025	S	$15,001 - $50,000	
Rollover IRA ⇒ Large Cap Equity Fund - Investor Class (AFDIX) [MF]	SP	10/07/2025	S (partial)	$1,001 - $15,000	
Rollover IRA ⇒ Large Cap Equity Fund - Investor Class (AFDIX) [MF]	SP	04/09/2025	S (partial)	$1,001 - $15,000	
Rollover IRA ⇒ UBS Sustainable Development Bank Bond Fund Class P (UDBPX) [MF]	SP	10/20/2025	S (partial)	$1,001 - $15,000	
Rollover IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	10/20/2025	S (partial)	$1,001 - $15,000	
Rollover IRA ⇒ Calvert Income Fund Class I (CINCX) [MF]	SP	03/17/2025	S (partial)	$1,001 - $15,000	
Rollover IRA ⇒ Victory Pioneer Global Equity Fund Class Y (PGSYX) [MF]	SP	05/14/2025	S (partial)	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Rollover IRA ⇒ AB Sustainable Global Thematic Fund - ADV (ATEYX) [MF]	SP	05/14/2025	S (partial)	$1,001 - $15,000	☐
Rollover IRA ⇒ Victory Pioneer Global Equity Fund Class Y (PGSYX) [MF]	SP	10/07/2025	S (partial)	$1,001 - $15,000	☐
Rollover IRA ⇒ UBS Sustainable Development Bank Bond Fund Class P (UDBPX) [MF]	SP	03/17/2025	S (partial)	$1,001 - $15,000	☐
Rollover IRA ⇒ UBS International Sustainable Equity Fund Class P (BNUEX) [MF]	SP	03/17/2025	S (partial)	$1,001 - $15,000	☐
Rollover IRA ⇒ Victory Pioneer Global Equity Fund Class Y (PGSYX) [MF]	SP	11/26/2025	P	$1,001 - $15,000	
Rollover IRA ⇒ AB Sustainable Global Thematic Fund - ADV (ATEYX) [MF]	SP	03/17/2025	P	$1,001 - $15,000	
Rollover IRA ⇒ UBS Engage For Impact Fund Class P2 (EIPTX) [MF]	SP	12/29/2025	P	$1,001 - $15,000	
Rollover IRA ⇒ Calvert Income Fund Class I (CINCX) [MF]	SP	12/23/2025	P	$1,001 - $15,000	
Rollover IRA ⇒ AB Sustainable Global Thematic Fund - ADV (ATEYX) [MF]	SP	12/10/2025	P	$1,001 - $15,000	
Rollover IRA ⇒ Large Cap Equity Fund - I Class (AFEIX) [MF]	SP	10/20/2025	P	$1,001 - $15,000	
Rollover IRA ⇒ UBS Sustainable Development Bank Bond Fund Class P (UDBPX) [MF]	SP	10/07/2025	P	$1,001 - $15,000	
Rollover IRA ⇒ UBS Sustainable Development Bank Bond Fund Class P (UDBPX) [MF]	SP	04/09/2025	P	$1,001 - $15,000	
Rollover IRA ⇒ Large Cap Equity Fund - I Class (AFEIX) [MF]	SP	12/17/2025	P	$1,001 - $15,000	
Rollover IRA ⇒	SP	04/01/2025	P	$15,001 - $50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Large Cap Equity Fund - I Class (AFEIX) [MF]					
Inherited Brokerage Account ⇒ State Street Consumer Staples Select Sector SPDR ETF (XLP) [EF]	SP	07/29/2025	S	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒ iShares MBS ETF (MBB) [EF]	SP	07/29/2025	S (partial)	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]	SP	04/09/2025	S	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒ iShares S&P 500 Growth ETF (IVW) [EF]	SP	03/11/2025	S (partial)	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒ State Street Consumer Discretionary Select Sector SPDR ETF (XLY) [EF]	SP	06/30/2025	S (partial)	$1,001 - $15,000	☑
Inherited Brokerage Account ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]	SP	07/29/2025	S	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒ State Street Consumer Discretionary Select Sector SPDR ETF (XLY) [EF]	SP	05/27/2025	S (partial)	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒ State Street Materials Select Sector SPDR ETF (XLB) [EF]	SP	04/09/2025	S	$1,001 - $15,000	☐
Inherited Brokerage Account ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]	SP	01/09/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ Vanguard Short-Term Bond ETF (BSV) [EF]	SP	04/09/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ iShares Gold Trust Shares (IAU) [EF]	SP	08/25/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]	SP	04/09/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ iShares Gold Trust Shares (IAU) [EF]	SP	03/11/2025	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Inherited Brokerage Account ⇒ iShares MBS ETF (MBB) [EF]	SP	06/30/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]	SP	10/20/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]	SP	04/09/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ State Street Consumer Discretionary Select Sector SPDR ETF (XLY) [EF]	SP	04/09/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ iShares Short-Term National Muni Bond ETF (SUB) [EF]	SP	07/29/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ Invesco National AMT-Free Municipal Bond ETFo (PZA) [EF]	SP	05/27/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ Vanguard Russell 1000 Growth ETF (VONG) [EF]	SP	04/09/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ State Street SPDR Nuveen ICE Short Term Municipal Bond ETF (SHM) [EF]	SP	07/29/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	04/09/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ Vanguard Mid-Cap ETF (VO) [EF]	SP	04/09/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]	SP	04/09/2025	P	$15,001 - $50,000	
Inherited Brokerage Account ⇒ State Street SPDR Nuveen ICE Municipal Bond ETF (TFI) [EF]	SP	07/29/2025	P	$50,001 - $100,000	
Inherited Brokerage Account ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF]	SP	04/08/2025	P	$1,001 - $15,000	
Inherited Brokerage Account ⇒	SP	04/08/2025	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
State Street Industrial Select Sector SPDR ETF (XLI) [EF]					

* 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
Connecticut Children's Medical Center	Spouse Salary	N/A

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

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

- TR 403(b) (Owner: SP)
- IRA
- Inherited IRA (Owner: SP)
  Description: IRA inherited in December 2018
- Inherited Brokerage Account (Owner: SP)
  Location: US
  Description: Account inherited in 2019
- Rollover IRA (Owner: SP)
- Hartford Healthcare 401k (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. Joe Courtney , 05/14/2026