



Filing ID #10077609

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Robert J. Wittman
Status: Member
State/District: VA01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/12/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Blue Ridge Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	☐
Blue Ridge Bankshares, Inc. Common Stock (BRBS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
C&F Bank Accounts [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
C&F Financial Corporation - Common Stock (CFFI) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
National Western Life Annuity [OT]	SP	\$1,001 - \$15,000	Annuity Payment	\$201 - \$1,000	☐
DESCRIPTION: This is a 403b TSA					
Rental House - Nags Head, NC [RP]	JT	\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	☐
LOCATION: Nags Head, NC, US					
Rental Property- Montross, VA [RP]	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	☐
LOCATION: Montross, VA, US					
401 (a) Virginia Cash Match Plan ⇒ Target Date 2025 Portfolio [OT]		\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Mutual fund available exclusively in Virginia retirement accounts.					
401 (a) Virginia Cash Match Plan ⇒ US Stock Fund [OT]		\$15,001 - \$50,000	Tax-Deferred		☐
DESCRIPTION: Mutual Fund held in Virginia retirement account.					
457 Virginia Deferred Compensation Plan ⇒ Target Date 2025 Portfolio [OT]		\$1,001 - \$15,000	Tax-Deferred		☐
DESCRIPTION: Mutual Fund held in Virginia retirement account.					
457 Virginia Deferred Compensation Plan ⇒ US Stock Fund [OT]		\$100,001 - \$250,000	Tax-Deferred		☐
DESCRIPTION: Mutual Fund held in Virginia retirement account.					
AXA Equitable Life Ins Co ⇒ AXA/Legg Mason Strat Alloc GB [OT]	SP	\$100,001 - \$250,000	Tax-Deferred		☐
DESCRIPTION: Mutual Fund held in variable life insurance plan.					
Morgan Stanley (JT) ⇒ Abbott Laboratories Common Stock (ABT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ AbbVie Inc. Common Stock (ABBV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$15,001 - \$50,000	None		☐
Morgan Stanley (JT) ⇒ American Express Company Common Stock (AXP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ American Tower Corporation (AMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ CASH [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley (JT) ⇒ Charles Schwab Corporation (SCHW) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Chevron Corporation Common Stock (CVX) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Crown Castle Inc. Common Stock (CCI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ Dominion Energy, Inc. Common Stock (D) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ Elevance Health, Inc. Common Stock (ELV) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ ExxonMobil Holdings Corporation Common Stock (XOM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ First Eagle Global Fund Class I (SGIIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Morgan Stanley (JT) ⇒ First Trust Amex Biotech Index Fund (FBT) [EF]		\$15,001 - \$50,000	None		☐
Morgan Stanley (JT) ⇒ First Trust Preferred Securities and Income Fund Class I (FPEIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ Harding Loevner Fund, Inc. International Eq Pt (HLMIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Morgan Stanley (JT) ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley (JT) ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ ITT Inc. Common Stock (ITT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Linde plc - Ordinary Shares (LIN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Lord Abbett Inv Tr. Short Duration Income Fd Cl I (LLDYX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ Lowe's Companies, Inc. Common Stock (LOW) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Marriott International - Class A Common Stock (MAR) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Marsh & McLennan Companies, Inc. Common Stock (MMC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Mastercard Incorporated Common Stock (MA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ McDonald's Corporation Common Stock (MCD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Mondelez International, Inc. - Class A Common Stock (MDLZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Motorola Solutions, Inc. Common Stock (MSI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Nationwide Geneva Small Cap Growth Fund Institutional		\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Service Class (NWKDX) [MF]					
Morgan Stanley (JT) ⇒ Neuberger Berman Intrinsic Value Insti (NINLX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ NYLI MacKay High Yield Muni Bond Fund Class I (MMHIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Packaging Corporation of America Common Stock (PKG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Pepsico, Inc. (PEP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Piedmont Realty Trust, Inc. Class A Common Stock (PDM) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]		\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	☒
Morgan Stanley (JT) ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Royal Gold, Inc. - Common Stock (RGLD) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ S&P Global Inc. Common Stock (SPGI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ State Street SPDR S&P 500 ETF Trust (SPY) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley (JT) ⇒ Texas Instruments Incorporated - Common Stock (TXN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ The Hartford Insurance Group, Inc. Common Stock (HIG) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ TJX Companies, Inc. (TJX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Trane Technologies plc (TT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Union Pacific Corporation Common Stock (UNP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ Visa Inc. (V) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ Walmart Inc. Common Stock (WMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley (JT) ⇒ WEC Energy Group, Inc. Common Stock (WEC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ Xylem Inc. Common Stock New (XYL) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Morgan Stanley (JT) ⇒ Zoetis Inc. Class A Common Stock (ZTS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Morgan Stanley INH IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ CASH [BA]		\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley INH IRA ⇒ First Trust Rising Dividend Achievers ETF (RDVY) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ iShares Biotechnology ETF (IBB) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ iShares Expanded Tech Sector ETF (IGM) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ Janus Henderson Global Life Sciences Fund - I Shares (JFNIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ Lord Abbett Inv Tr. Short Duration Income Fd Cl I (LLDYX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ PGIM Jennison Global Opportunities Fund Class Z (PRJZX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ PGIM Ultra Short Bond ETF (PULS) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ State Street Consumer Discretionary Select Sector SPDR ETF (XLY) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley INH IRA ⇒ State Street Consumer Staples Select Sector SPDR ETF (XLP) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ State Street Utilities Select Sector SPDR ETF (XLU) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ T. Rowe Price Blue Chip Growth Fund, Inc. (TRBCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley INH IRA ⇒ WisdomTree International Hedged Quality Dividend Growth Fund (IHDG) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley IRA ⇒ Invesco S&P 500 Equal Weight Technology ETF (RSPT) [EF]	SP	\$1,001 - \$15,000	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?
Morgan Stanley (JT) ⇒ Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]		03/28/2025	S (partial)	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]		03/28/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		02/24/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Lord Abbett Inv Tr. Short Duration Income Fd Cl I (LLDYX) [MF]		03/28/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]		03/28/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]		03/28/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]		03/28/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley (JT) ⇒ Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]		03/28/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ State Street Consumer Staples Select Sector SPDR ETF (XLP) [EF]		04/08/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF]		04/08/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]		04/08/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]		04/08/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ State Street Utilities Select Sector SPDR ETF (XLU) [EF]		07/08/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]		07/08/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒		07/08/2025	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
State Street Health Care Select Sector SPDR ETF (XLV) [EF]			(partial)		☐
Morgan Stanley INH IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		07/08/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ State Street Consumer Staples Select Sector SPDR ETF (XLP) [EF]		07/08/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Lord Abbett Inv Tr. Short Duration Income Fd Cl I (LLDYX) [MF]		07/09/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]		07/09/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ iShares Expanded Tech Sector ETF (IGM) [EF]		08/13/2025	P	\$15,001 - \$50,000	
Morgan Stanley INH IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		08/13/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]		08/13/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]		08/13/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ Lord Abbett Inv Tr. Short Duration Income Fd Cl I (LLDYX) [MF]		08/13/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley (JT) ⇒ Neuberger Berman Intrinsic Value Insti (NINLX) [MF]		08/06/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley (JT) ⇒ Harding Loevner Fund, Inc. International Eq Pt (HLMIX) [MF]		08/06/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley (JT) ⇒ Nationwide Geneva Small Cap Growth Fund Institutional Service Class (NWKDX) [MF]		08/06/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒		11/03/2025	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares Expanded Tech Sector ETF (IGM) [EF]			(partial)		☐
Morgan Stanley INH IRA ⇒ State Street Consumer Staples Select Sector SPDR ETF (XLP) [EF]		11/03/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]		11/03/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]		11/03/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ iShares Biotechnology ETF (IBB) [EF]		11/17/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ State Street Consumer Discretionary Select Sector SPDR ETF (XLY) [EF]		11/17/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]		11/17/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ iShares Expanded Tech Sector ETF (IGM) [EF]		11/17/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ Janus Henderson Global Life Sciences Fund - I Shares (JFNIX) [MF]	SP	09/02/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Nationwide Geneva Small Cap Growth Fund Institutional Service Class (NWKDX) [MF]	SP	09/02/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley INH IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	09/02/2025	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ iShares U.S. Broker-Dealers & Securities Exchanges ETF (IAI) [EF]		02/24/2025	S	\$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
Virginia Retirement System	Retirement Distribution	\$24,796.08
Morgan Stanley IRA	Spouse Retirement Distributions	N/A
Virginia Retirement System	Spouse Retirement Distribution	N/A
Morgan Stanley IRA	Retirement Distributions	\$9,175.32

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Blue Ridge Bank	November 2018	Real Property at Nags Head, NC	\$500,001 - \$1,000,000
JT	Wells Fargo	July 2020	Mortgage on residence	\$100,001 - \$250,000
JT	Wells Fargo	June 2019	Mortgage on rental - Montross, VA	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
August 1981	Virginia Retirement System	Defined Benefit

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

◦ Morgan Stanley INH IRA (Owner: SP) ◦ AXA Equitable Life Ins Co (Owner: SP)
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- Morgan Stanley INH IRA
- 401 (a) Virginia Cash Match Plan
- Morgan Stanley IRA (Owner: SP)
- 457 Virginia Deferred Compensation Plan
- Morgan Stanley (JT)
LOCATION: US

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Robert J. Wittman , 08/12/2026