



Filing ID #10083090

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. David J. Taylor
Status: Member
State/District: OH02

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2025
Filing Date: 10/27/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Blackrock 529 - Child 2 ⇒ BR Growth Portfolio Option A [5F] LOCATION: OH	SP	\$50,001 - \$100,000	Tax-Deferred		☐
Blackrock 529 - Child 3 ⇒ BR Growth Portfolio Option A [5F] LOCATION: OH	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Dave's IRA @ Schwab (Abundance) ⇒ AMG River Road Small Cap Value Fund - Class I (ARSIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Dave's IRA @ Schwab (Abundance) ⇒ Artisan Global Value Fund Advisor Shares (APDGX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Dave's IRA @ Schwab (Abundance) ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Dave's IRA @ Schwab (Abundance) ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Dave's IRA @ Schwab (Abundance) ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Dave's IRA @ Schwab (Abundance) ⇒ Grandeur Peak Global Reach Fund, Institutional Class (GPRIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Dave's IRA @ Schwab (Abundance) ⇒ Invesco S&P 500 Equal Weight Financial ETF (RSPF) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Dave's IRA @ Schwab (Abundance) ⇒ New Perspective Fund - Class F-3 (FNPFX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Dave's IRA @ Schwab (Abundance) ⇒ PGIM Jennison Health Sciences Fund Class Z (PHSZX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Dave's IRA @ Schwab (Abundance) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☒
Dave's IRA @ Schwab (Abundance) ⇒ VanEck Morningstar Wide Moat ETF (MOAT) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Dave's IRA @ Schwab (Abundance) ⇒ Vanguard Total International Stock ETF (VXUS) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☒
Dave's IRA @ Schwab (Abundance) ⇒ WisdomTree Global High Dividend Fund (DEW) [EF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ AT&T Inc. (T) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Dave's IRA @ Schwab (Home Grown) ⇒ Chevron Corporation Common Stock (CVX) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco Pharmaceuticals ETF (PJP) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
Dave's IRA @ Schwab (Home Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
Dave's IRA @ Schwab (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Kroger Company (KR) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Dave's IRA @ Schwab (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
Dave's IRA @ Schwab (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
Dave's IRA @ Schwab (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Visa Inc. (V) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ 5/3 Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	☐
David Taylor Trust ⇒ First State Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	☐
David Taylor Trust ⇒ J.P. Morgan Chase bank Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	☐
David Taylor Trust ⇒ OPERS [BA]		\$15,001 - \$50,000	None		☐
David Taylor Trust ⇒ Rental Property [RP] LOCATION: Cincinnati, OH, US		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	☐
David Taylor Trust ⇒ Taylor Asphalt Restoration [OT] DESCRIPTION: LLC owned by spouse		\$100,001 - \$250,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ AT&T Inc. (T) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Chevron Corporation Common Stock (CVX) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Installed Building Products, Inc. Common Stock (IBP) [ST]					
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Invesco Pharmaceuticals ETF (PJP) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Kroger Company (KR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ The J.M. Smucker Company Common Stock (SJM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Visa Inc. (V) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ AGCO Corporation Common Stock (AGCO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ American Financial Group, Inc. Common Stock (AFG) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Chevron Corporation Common Stock (CVX) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ DTE Energy Company Common Stock (DTE) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Globe Life Inc. Common Stock (GL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ NiSource Inc Common Stock (NI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Northrop Grumman Corporation Common Stock (NOC) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ PPG Industries, Inc. Common Stock (PPG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ State Street Energy Select Sector SPDR ETF (XLE) [EF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Timken Company (TKR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐

* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		08/14/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Kroger Company (KR) [ST]		02/20/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		03/27/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		05/14/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ AT&T Inc. (T) [ST]		10/30/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		11/03/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		11/11/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]		08/07/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		11/11/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		03/10/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown)		03/10/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]					
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		08/07/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		03/10/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		11/03/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		02/05/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		02/10/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		06/25/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		06/24/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		08/07/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		08/07/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Visa Inc. (V) [ST]		08/13/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒		02/11/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
The J.M. Smucker Company Common Stock (SJM) [ST]					
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		05/15/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		09/22/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ AT&T Inc. (T) [ST]		07/18/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Kroger Company (KR) [ST]		09/22/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		05/12/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		09/09/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		06/25/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		09/09/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		06/11/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		09/09/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Visa Inc. (V) [ST]		11/12/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		11/03/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		07/18/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		03/10/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Visa Inc. (V) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒		02/25/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Home Depot, Inc. (HD) [ST]					
Dave's IRA @ Schwab (Home Grown) ⇒ AT&T Inc. (T) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		08/14/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Chevron Corporation Common Stock (CVX) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Kroger Company (KR) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]		02/25/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dave's IRA @ Schwab (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		03/27/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Medpace Holdings, Inc. - Common Stock (MEDP) [ST]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		05/14/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		12/10/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ AT&T Inc. (T) [ST]		10/30/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		11/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Visa Inc. (V) [ST]		12/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]		09/09/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		12/10/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		11/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Kroger Company (KR) [ST]		09/16/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		09/03/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dave's IRA @ Schwab (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		08/14/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Home Depot, Inc. (HD) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		03/10/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		08/13/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		08/13/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Visa Inc. (V) [ST]		08/13/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ AT&T Inc. (T) [ST]		07/18/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Procter & Gamble Company (PG) [ST]		09/22/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		07/18/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ RPM International Inc. Common Stock (RPM) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Prologis, Inc. Common Stock (PLD) [ST]		08/14/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dave's IRA @ Schwab (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		09/09/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		09/22/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Chevron Corporation Common Stock (CVX) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		06/11/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		03/10/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]		05/14/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Kroger Company (KR) [ST]		09/22/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Progressive Corporation (PGR) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Medpace Holdings, Inc. - Common Stock (MEDP) [ST]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		06/24/2025	S	\$1,001 - \$15,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		07/18/2025	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dave's IRA @ Schwab (Home Grown) ⇒ AT&T Inc. (T) [ST]		03/10/2025	S	\$1,001 - \$15,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		07/18/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		06/24/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		06/24/2025	S	\$1,001 - \$15,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		06/24/2025	S	\$1,001 - \$15,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Marathon Petroleum Corporation Common Stock (MPC) [ST]		06/24/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ American Electric Power Company, Inc. (AEP) [ST]		11/03/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Kroger Company (KR) [ST]		06/24/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST]		06/24/2025	S	\$1,001 - \$15,000	☐
Dave's IRA @ Schwab (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		06/24/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		12/03/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Medpace Holdings, Inc. - Common Stock (MEDP) [ST]		07/23/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		06/11/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		06/24/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒		05/12/2025	S	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Microsoft Corporation - Common Stock (MSFT) [ST]					
Dave's IRA @ Schwab (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		10/30/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		09/09/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		09/03/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		06/24/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		09/22/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		12/10/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		08/13/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		11/03/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		05/14/2025	S	\$15,001 - \$50,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]		03/27/2025	S	\$15,001 - \$50,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		08/14/2025	S	\$15,001 - \$50,000	☒
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco Pharmaceuticals ETF (PJP) [EF]		06/24/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco Pharmaceuticals ETF (PJP) [EF]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Home Grown) ⇒		05/14/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares U.S. Health Care Providers ETF (IHF) [EF]					
Dave's IRA @ Schwab (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]		02/25/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		03/04/2025	P	\$100,001 - \$250,000	
Dave's IRA @ Schwab (Abundance) ⇒ New Perspective Fund - Class F-3 (FNPFX) [MF]		03/04/2025	P	\$50,001 - \$100,000	
Dave's IRA @ Schwab (Abundance) ⇒ Artisan Global Value Fund Advisor Shares (APDGX) [MF]		03/04/2025	P	\$50,001 - \$100,000	
Dave's IRA @ Schwab (Abundance) ⇒ Grandeur Peak Global Reach Fund, Institutional Class (GPRIX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ AMG River Road Small Cap Value Fund - Class I (ARSIX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Evolutionary Tree Innovators Fund - I Class Shares (INVNX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ PGIM Jennison Health Sciences Fund Class Z (PHSZX) [MF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		10/03/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		12/30/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Dave's IRA @ Schwab (Abundance) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		03/18/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Abundance) ⇒ Evolutionary Tree Innovators Fund - Class A (INVTX) [MF]		10/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Abundance) ⇒ New Perspective Fund - Class F-3 (FNPFXX) [MF]		06/18/2025	S	\$1,001 - \$15,000	☐
Dave's IRA @ Schwab (Abundance) ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		04/14/2025	S	\$1,001 - \$15,000	☐
Dave's IRA @ Schwab (Abundance) ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		10/03/2026	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Abundance) ⇒ AMG River Road Small Cap Value Fund - Class I (ARSIX) [MF]		10/03/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Abundance) ⇒ PGIM Jennison Health Sciences Fund Class Z (PHSZX) [MF]		10/03/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Abundance) ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		10/03/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Abundance) ⇒ Grandeur Peak Global Reach Fund, Institutional Class (GPRIX) [MF]		10/03/2025	S	\$15,001 - \$50,000	☒
Dave's IRA @ Schwab (Abundance) ⇒ Vanguard Total International Stock ETF (VXUS) [EF]		03/04/2025	P	\$50,001 - \$100,000	
Dave's IRA @ Schwab (Abundance) ⇒ WisdomTree Global High Dividend Fund (DEW) [EF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ VanEck Morningstar Wide Moat ETF (MOAT) [EF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]		03/04/2025	P	\$15,001 - \$50,000	
Dave's IRA @ Schwab (Abundance) ⇒		03/04/2025	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Invesco S&P 500 Equal Weight Financial ETF (RSPF) [EF]					
Dave's IRA @ Schwab (Abundance) ⇒ Vanguard Total International Stock ETF (VXUS) [EF]		10/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Abundance) ⇒ WisdomTree Global High Dividend Fund (DEW) [EF]		10/03/2025	P	\$1,001 - \$15,000	
Dave's IRA @ Schwab (Abundance) ⇒ Invesco S&P 500 Equal Weight Financial ETF (RSPF) [EF]		10/03/2025	P	\$1,001 - \$15,000	
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		12/03/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		05/12/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		06/11/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		01/30/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Visa Inc. (V) [ST]		01/30/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Apple Inc. - Common Stock (AAPL) [ST]		10/30/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		09/03/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		06/24/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒		09/22/2025	S	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Lam Research Corporation - Common Stock (LRCX) [ST]					
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		09/09/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		07/18/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ AT&T Inc. (T) [ST]		03/10/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Installed Building Products, Inc. Common Stock (IBP) [ST]		08/07/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		11/03/2025	S	\$1,001 - \$15,000	☒
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		05/14/2025	S	\$1,001 - \$15,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ The J.M. Smucker Company Common Stock (SJM) [ST]		02/20/2025	S	\$1,001 - \$15,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		08/14/2025	S	\$1,001 - \$15,000	☐
David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]		03/27/2025	S	\$1,001 - \$15,000	☒
Dave's IRA @ Schwab (Abundance) ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]		03/04/2025	P	\$15,001 - \$50,000	
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ AB Large Cap Growth Fund, Inc. - Advisor Class (APGYX) [MF]		02/10/2025	S	\$100,001 - \$250,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity Emerging Markets Index Fund (FPADX) [MF]		02/10/2025	S	\$100,001 - \$250,000	☐
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity Small Cap Value Fund (FCPVX) [MF]		02/10/2025	S	\$15,001 - \$50,000	☐
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		02/10/2025	S	\$100,001 - \$250,000	☐
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity International Index Fund (FSPSX) [MF]		02/10/2025	S	\$100,001 - \$250,000	☐
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity Small Cap Index Fund (FSSNX) [MF]		02/10/2025	S	\$50,001 - \$100,000	☐
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		02/10/2025	S	\$250,001 - \$500,000	☐
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ JPMorgan Small Cap Growth Fund R6 (JGSMX) [MF]		02/10/2025	S	\$15,001 - \$50,000	☐
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ American Funds EuroPacific Growth A (AEPGX) [MF]		02/10/2025	S	\$100,001 - \$250,000	☐
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ SMALLCAP World Fund, Inc. Cl R-6 (RLLGX) [MF]		02/10/2025	S	\$50,001 - \$100,000	☐
David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave ⇒ Washington Mutual Investors Fund Cl R-6 Shs (RWMGX) [MF]		02/10/2025	S	\$100,001 - \$250,000	☐

* 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
Sardinia Ready Mix, Inc.	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	First State bank, Winchester, Ohio	May 2020	Mortgage on rental property, Cincinnati, Ohio	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	David Taylor Trust
Director	Sardinia Ready Mix, Inc.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 1995	Myself and the State of Ohio	Continued participation in pension plan

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

◦ Dave's IRA @ Schwab (Abundance) ◦ David Taylor Trust ⇒ Schwab Joint Brokerage #2 - (Non-Managed) ◦ David Taylor Trust ⇒ Schwab Joint Brokerage #1 (Home Grown) ◦ Blackrock 529 - Child 2 (Owner: SP) LOCATION: OH ◦ Blackrock 529 - Child 3 (Owner: SP) LOCATION: OH ◦ Dave's IRA @ Schwab (Home Grown) ◦ David Taylor Trust ◦ David Taylor Trust ⇒ Sardinia Ready Mix 401(k) - Dave

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. David J. Taylor , 10/27/2026