UNITED STATES HOUSE OF REPRESENTATIVES
2025 FINANCIAL DISCLOSURE REPORT

Form A
For Use by Members Officers and Employees

AUG 12 2026
LEGISLATIVE RESOURCE CENTER
(Office Use Only)
2026 AUG 17 PM 2 07
OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES
MC

Name GEORGE WHITESIDES **Daytime Telephone** _____

A $200 penalty shall be assessed against any individual who files more than 30 days late

FILER STATUS	☑ Member of the U S House of Representatives — State CA District 27	☐ Officer or Employee — Employing Office _____	Staff Filer Type (If Applicable) Shared ☐ Principal Assistant ☐
REPORT TYPE	☑ 2025 Annual (Due May 15 2026)	☐ Amendment	☐ Termination — Date of Termination _____

A Did you your spouse or your dependent child a Own any reportable asset that was worth more than $1 000 at the end of the reporting period? or b Receive more than $200 in unearned income from any reportable asset during the reporting period?	Yes ☑ No ☐	**F** Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?	Yes ☑ No ☐
B Did you your spouse or your dependent child purchase sell or exchange any securities or reportable real estate in a transaction exceeding $1 000 during the reporting period?	Yes ☑ No ☐	**G** Did you your spouse or your dependent child receive any reportable gift(s) totaling more than $480 in value from a single source during the reporting period?	Yes ☐ No ☑
C Did you or your spouse have earned income (*e g* salaries honoraria or pension/IRA distributions) of $200 or more during the reporting period?	Yes ☐ No ☑	**H** Did you your spouse or your dependent child receive any reportable travel or reimbursements for travel totaling more than $480 in value from a single source during the reporting period?	Yes ☐ No ☑
D Did you your spouse or your dependent child have any reportable liability (more than $10 000) at any point during the reporting period?	Yes ☑ No ☐	**I** Did any individual or organization donate to charity in lieu of paying you for a speech appearance or article during the reporting period?	Yes ☑ No ☐
E Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes ☑ No ☐	**ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER YES**	

PRELIMINARY INFORMATION – ANSWER EACH OF THESE QUESTIONS

IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION ANSWER EACH OF THESE QUESTIONS

IPO – Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered yes to this question please contact the Committee on Ethics for further guidance	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 that benefits 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 your dependent child because they meet all three tests for exemption? Do not answer "yes unless you have first consulted with the Committee on Ethics	Yes ☐	No ☐

SCHEDULE A – ASSETS & UNEARNED INCOME"

Name George Whitesides

BLOCK A — Assets and/or Income Sources

Id ntify( )each sset th ld fc investment prod ction f Incom nd with f market val exceeding $1 000 at th d f th reportingp ri d nd(b) ny the reportable as et rce of i com that ge rat d m re tha $200 i am d inc m d ng the yea

Provid complete names f stocks nd mutual funds (d t ly ticke ymb ls)

F all IRAs d othe reti ment plans (h as 401(k) *pla)p ovid the valu f each asset held i th co nt* th t exceed the reporti g thresh lds.

Fo b k d oth rca h cco ts total th mount l ll interest-b ring acco nts if th tal la ove $5 000 i t every fi cial instituti wh re there is more th $1 000 i int rest b ing counts

F rental and th r re l p p rty h ld f Investm t, provid complete ddress description, e.g. rental prop rty d ty d stat

F wn rship int rest in privately-h ld b i ss that ot p blicly trad d stat th nam of th bu ss th nature of its ctivities end its g graphi location i Block A.

Exclude: Y pers l resid Includi g co d h mes nd voc ti h m (*unl ss* there wa rental i com d ring th rep rting p riod) and ny fin l l interest i or income d rived from, a fed ral retirem nt program I ludi g th Thrift Savi gs Pla

If yo p rt privately-traded fund th is Excepted Investm t F d ple se heck th EIF" box.

If yo choo yo m y indicate th t t In m rce l th t f yo pous (SP) d p d nt hild (DC) *j ntly h ld with nya (JT) i th pti l colum* th far left.

Fo d ta'led dis ssi f S hed le A req irements pleas ref to th I str ti b klet.

BLOCK B — Value of Asset

I dicate valu of asset at los f th rep rting p riod. If yo valuation meth d th th f l m rket val ple pa ify ha meth d u d

If asset was sold d g the reporting period d is Included nly because It gen rated Incom th valu hould b N ne

Colum M I f ass ts held by yo po se d pend nt hild in which yo have Interest.

BLOCK C — Type of Income

Ch ck ll columns that pply Fo cco ts th g er te tax def rred Incom (uch as 401(k) IRA, 529 cc unts) yo may ch ck the "Tax Deferred" column. Divid nds, Interest, nd capital gains, ev n If Invest d must be disclo ed Incom fo ss ts held in taxabl accounts. Ch ck N ne If th sset generated Inc m d ri g th rep rting period.

BLOCK D — Amount of Income

F as ts fo which yo hecked "Tax-D f rred I Blo k C y may h ck th N column. Fo ll ther ass ts indicate th category of Incom by h king th ppropriate b below. Di idend Interest, nd capital gains, even if reinvested must b disclo ed Incom fo ets held in taxable accounts Check N if I com was earned rgenerated

Colum XII i f ass ts h ld by yo p us d p nd nt hild i whi h yo have Interest.

BLOCK E — Transaction

I dicate if th asset h d purchases (P) les (S) exchang (E) exc d ng $1 000 i th reporti g period

If ly p rti n of an t w ld pla indicate as follows. (S (p rt))

Leave thi lum blank f there re no tra ti ns that exceeded $1 000

| | | |

SCHEDULE A – ASSETS & "UNEARNED INCOME"

Name George Whitesides

BLOCK A Assets and/or Income Sources			BLOCK B Value of Asset													BLOCK C Type of Income								BLOCK D Amount of Income												BLOCK E Transaction
SP DC, JT	ASSET NAME	EIF	A N	B $1 $1 000	C $1 001 $15 000	D $16 001 $50 000	E $50 001 $100 000	F $100 001 $250 000	G $250,001 $500 000	H $500 001 $1 000 000	I $1 000 001 $5 000 000	J $5 000 001 $25 000 000	K $25 000 001-$50 000 000	L Ove $50 000 000	M Sp /DC Asset ove $1 000 000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX DEFERRED	Oth Typ f I m (Sp ally o g P rt hip l com F m l m)	I N	II $1 $200	III $201 $1 000	IV $1 001 $2,500	V $2 501 $5 000	VI $5 001-$15 000	VII $15 001-$50 000	VIII $50 001-$100 000	IX $100 001 $1 000,000	X $1 000 001-$5,000 000	XI Ove $5,000 000	XII Sp e/DCA ot with ing m ov $1 000 000	
	Money Market Fund								X										X										X							
	Redwood Credit Union Checking							X								X																				
	Federated Treasury Obligation		X																X										X							
	JPM Ultra-Short Muni								X								X			X									X							X
	JPM Ultra-Short Muni									X							X			X										X						X
	529 American funds 2027					X																X														
	529 American funds 2027	F2							X													X														
	529 American funds 2030					X																X														
	529 American funds 2030	F2							X													X														
	Capital Group Growth ETF							X									X									X										X
	Invesco QQQ ETF									X							X										X									X
	Invesco S&P Equal Weight ETF								X								X										X									X
	Industrial Sector ETF						X										X									X										X
	S&P500 High Dividend ETF		X																	X							X									X
	Technology Sector ETF									X							X			X							X									X
	Vaneck Semiconductor ETF								X								X									X										
	Vanguard Div Appreciation	ETF					X										X										X									X
	ESG US stock ETF									X							X												X							X

SCHEDULE A – ASSETS & "UNEARNED INCOME"

Name George Whitesides

BLOCK A Assets and/or Income Sources			BLOCK B Value of Asset													BLOCK C Type of Income								BLOCK D Amount of Income												BLOCK E Transaction
SP DC JT	ASSET NAME	EIF	A Non	B $1 $1 000	C $1 001-$15 000	D $15 001 $50 000	E $50 001-$100,000	F $100 001 $250 000	G $250 001 $500,000	H $500 001 $1 000 000	I $1 000 001 $5 000 000	J $5 000 001-$25 000 000	K $25 000 001-$50 000 000	L Over $50 000 000	M Spouse/DC Asset over $1 000 000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Spouse/DC Partnership income)	I None	II $1 $200	III $201 $1 000	IV $1 001 $2 500	V $2 501 $5 000	VI $5 001-$15 000	VII $15 001 $50 000	VIII $50 001 $100 000	IX $100 001 $1 000 000	X $1 000 001 $5 000 000	XI Over $5 000 000	XII Spouse/DC Asset within one of $1 000 000	
	Vanguard S&P 500 ETF									X							X											X								X
SP	FTSE All-World ex SmCap ETF		X																	X										X						X
SP	FTSE Emerging Mkt ETF		X																	X										X						X
SP	Mid-Cap Growth ETF		X																	X												X				X
SP	Mid Cap Value ETF		X																	X												X				X
SP	Small cap Growth ETF		X																	X												X				X
SP	Small Cap Value ETF		X																	X												X				X
	iShares Mid Cap ETF						X										X									X										
	iShares Tech Software ETF		X																	X									X							X
	MSCI USA Quality ETF								X								X										X									X
	Russell 1000 Value ETF							X									X										X									X
	Financial Select Sector ETF							X									X									X										X
	Technology Sector ETF								X								X										X									X
	Vaneck Semiconductor ETF							X									X									X										
SP	S&P 500 Equal Weight ETF								X								X											X								X
SP	S&P 500 Quality ETF									X							X											X								X
SP	Invesco QQQ ETF								X								X									X										X
SP	S&P Mid Cap ETF		X																	X								X								X

SCHEDULE A – ASSETS & ' UNEARNED INCOME

Name George Whitesides

BLOCK A Assets and/or Income Sources			BLOCK B Value of Asset													BLOCK C Type of Income								BLOCK D Amount of Income												BLOCK E Transaction
SP DC, JT	ASSET NAME	EIF	A None	B $1 $1 000	C $1 001 $15 000	D $15 001-$50 000	E $50 001-$100 000	F $100 001 $250 000	G $250 001 $500 000	H $500 001 $1 000 000	I $1 000 001 $5 000 000	J $5 000 001 $25 000 000	K $25 000 001 $50 000 000	L Over $50 000 000	M Spouse/DC Asset over $1 000 000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify Partial or Full)	I None	II $1-$200	III $201 $1 000	IV $1 001 $2,500	V $2 501-$5 000	VI $5 001-$15 000	VII $15 001 $50 000	VIII $50 001 $100 000	IX $100 001-$1 000 000	X $1 000 001-$5 000 000	XI Over $5 000 000	XII Spouse/DC Asset with Income over $1 000 000	
SP	S&P Small Cap ETF		X																	X							X									
SP	MSCI USA Quality ETF								X								X			X								X								X
SP	FTSE All-Wrld Ex US ETF									X							X			X										X						X
SP	Vanguard Growth ETF									X							X										X									
SP	Vanguard High Div ETF								X								X			X									X							X
SP	Mega Cap Growth ETF									X							X										X									
SP	Mega Cap Value ETF								X								X			X										X						X
SP	Vanguard S&P 500 ETF									X							X												X							X
SP	Vanguard Value ETF								X								X			X										X						X
	iShares Biotech ETF		X																	X										X						X
	S&P 500 High Div ETF		X																	X								X								X
	Invesco QQQ Trust ETF							X														X														X
	S&P Equal Weight ETF						X															X														X
	S&P 500 Quality ETF							X														X														X
	MSCI USA Quality ETF						X															X														X
	Russell 1000 Value ETF					X																X														
	Financial Sector ETF					X																X														X
	Industrial Sector ETF				X																	X														

SCHEDULE A – ASSETS & UNEARNED INCOME"

Name George Whitesides

BLOCK A Assets and/or Income Sources			BLOCK B Value of Asset													BLOCK C Type of Income								BLOCK D Amount of Income												BLOCK E Transaction
SP DC JT	ASSET NAME	EIF	A None	B $1 $1 000	C $1 001 $15 000	D $15 001 $50 000	E $50 001 $100,000	F $100 001 $250 000	G $250,001 $500 000	H $500 001 $1 000 000	I $1 000 001 $5 000 000	J $5 000,001 $25 000 000	K $25 000 001 $50 000 000	L Over $50 000 000	M Spouse/DC Asset Over $1 000 000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX DEFERRED	Oth Type of Income (Specify Spouse/DC Asset Income)	I None	II $1 $200	III $201 $1 000	IV $1 001 $2 500	V $2,501 $5 000	VI $5 001 $15 000	VII $15 001 $50 000	VIII $50 001 $100 000	IX $100 001 $1 000 000	X $1 000 001-$5,000 000	XI Over $5,000 000	XII Spouse/DC Asset with Income over $1 000 000	
	Technology Sector ETF						X															X														X
	S&P 500 ETF								X													X														X
	Capital Group Growth ETF								X								X									X										X
	Invesco QQQ Trust ETF										X						X											X								X
	S&P 500 Equal Weight ETF								X								X											X								X
	S&P 500 Quality ETF								X								X											X								X
	S&P 500 Mid-Cap ETF		X																	X									X							X
	S&P Small-Cap ETF		X																	X						X										X
	iShares tech-Software ETF		X																	X								X								X
	MSCI USA Quality ETF									X							X												X							X
	Russell 1000 Value ETF								X								X											X								X
	Financial Sector ETF							X									X										X									X
	Health Care Sector ETF		X														X									X										X
	Growth of America fund (MF)										X						X												X							X
	Washington Mutual Investors (MF)										X						X												X							X
	WCM Focused Intl Growth (MF)							X									X										X									X
	MFS Intl Growth fund (MF)								X								X											X								X
	Growth of America fund (MF)										X						X												X							X

SCHEDULE A – ASSETS & "UNEARNED INCOME"

Name George Whitesides

BLOCK A Assets and/or Income Sources			BLOCK B Value of Asset													BLOCK C Type of Income								BLOCK D Amount of Income												BLOCK E Transaction
SP DC JT	ASSET NAME	EIF	A None	B $1-$1 000	C $1 001-$15,000	D $15 001 $50 000	E $50 001 $100 000	F $100 001 $250 000	G $250 001 $500 000	H $500 001 $1 000 000	I $1 000 001-$5 000 000	J $5 000 001 $25 000 000	K $25 000 001-$50 000 000	L Over $50 000 000	M Spouse/DC Asset over $1 000 000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX DEFERRED	Other Type of Income (Specify Partnership Income)	I None	II $1-$200	III $201-$1 000	IV $1 001 $2 500	V $2 501 $5,000	VI $5,001-$15 000	VII $15 001 $50 000	VIII $50 001 $100 000	IX $100 001 $1 000 000	X $1 000,001 $5 000 000	XI Over $5 000 000	XII Spouse/DC Asset with income over $1 000 000	
	Washington Mutual Investors	(MF)									X						X												X							X
	Franklin Rising Dividend	(MF)	X																	X								X								X
	Vanguard Target 2045	(MF)	X																	X										X						X
	Washington Mutual Investors	(MF)	X																	X												X				X
	MFS Intl Growth fund	(MF)					X															X														X
	MFS Intl Growth fund	(MF)							X								X										X									
SP	Space Forge	X					X									X																				
	Atreides Foundation fund	X									X					X																				
	Bridge Investment Group	X							X								X												X							
	Celestial Citizen	X				X										X																				
	Foresite Capital Mgmt	X						X								X																				
	Hawk Ridge Partners	X								X						X																				
	NB Secondary Opportunities	X							X								X													X						
	Pomona Investment fund	X								X							X												X							
SP	Free Wilbur LLC	X						X								X																				
SP	Nikola Venus	X						X								X																				
	Summit Partners	X								X						X																				

SCHEDULE A – ASSETS & UNEARNED INCOME"

Name George Whitesides

BLOCK A Assets and/or Income Sources			BLOCK B Value of Asset													BLOCK C Type of Income								BLOCK D Amount of Income												BLOCK E Transaction
SP DC JT	ASSET NAME	EIF	A N	B $1 $1 000	C $1 001 $15 000	D $15 001 $50 000	E $50 001 $100 000	F $100 001 $250 000	G $250 001 $500,000	H $500 001 $1 000 000	I $1 000 001 $5 000 000	J $5 000 001-$25 000 000	K $25 000 001-$50 000 000	L Ove $50 000,000	M Spou a/DC As t ove $1 000 000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX DEFERRED	Oth Typ of In m (Specify e.g. P rtnership l com or Farm Incom)	I N ne	II $1-$200	III $201 $1 000	IV $1 001 $2,500	V $2,501 $5 000	VI $5 001 $15 000	VII $15 001 $50 000	VIII $50 001-$100 000	IX $100 001 $1 000 000	X $1 000 001 $5 000 000	XI Over $5 000 000	XII Sp a/DC Asset with Inc m r $1 000 000	
— Divested Assets —																																				
SP	Innoviva, Inc		X																	X												X				X
	American Electric Power		X																	X								X								X
	Bank of America		X																	X										X						X
	Chubb Limited		X																	X											X					X
	Citigroup, Inc		X																	X									X							X
	Coca-Cola Co		X																	X										X						X
	Comcast Corp		X																	X								X								X
	Home Depot		X																	X											X					X
	Innoviva, Inc		X																	X											X					X
	Johnson & Johnson		X																	X										X						X
	JPM Chase		X																	X										X						X
	Linde PLC		X																	X											X					X
	Lockheed Martin		X																	X										X						X
	Marsh & McLennan		X																	X												X				X
	McDonalds Corp		X																	X											X					X
	Medtronic Plc		X																	X								X								X
	Microsoft Corp		X																	X												X				X

SCHEDULE A – ASSETS & ' UNEARNED INCOME'

Name George Whitesides

BLOCK A Assets and/or Income Sources			BLOCK B Value of Asset													BLOCK C Type of Income								BLOCK D Amount of Income												BLOCK E Transaction
SP DC, JT	ASSET NAME	EIF	A N	B $1 $1 000	C $1 001 $15 000	D $15 001 $50 000	E $50 001 $100,000	F $100 001 $250 000	G $250 001 $500 000	H $500 001 $1 000 000	I $1 000 001-$5 000 000	J $5 000 001-$25 000 000	K $25 000 001 $50 000 000	L Ove $50 000 000	M Sp use/DC As t over $1 000 000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Oth Typ l In m (Spe lty g P rtne hip l m or Farm Incom)	I N	II $1 $200	III $201-$1 000	IV $1 001 $2,500	V $2,501 $5,000	VI $5 001 $15 000	VII $15 001 $50 000	VIII $50 001 $100 000	IX $100 001 $1 000 000	X $1 000 001-$5 000 000	XI Ove $5 000 000	XII Spo e/DC A set with In me ov $1 000 000	
	Nextera Energy		X																	X										X						X
	Novartis AG		X																	X										X						X
	Procter & Gamble		X																	X										X						X
	Republic Services		X																	X											X					X
	Rockwell Automation		X																	X										X						X
	Royal Caribbean		X																	X												X				X
	RTX Corp		X																	X										X						X
	Sandoz Group AG		X																	X								X								X
	Texas Instruments		X																	X										X						X
	Union Pacific		X																	X										X						X
	Visa, Inc		X																	X										X						X
	Netflix, Inc		X																	X												X				X

SCHEDULE B – TRANSACTIONS

Name George Whitesides

Rep rt ny purcha e le, exch g transacti ns that ed d $1 000 l tho rep rting peri d of ny security real prop rty held by you, you p se yo d p nd nt hild fo Investm nt th prod ction fi coma. I lud tra sacti ns that res tted in capital loss. Provid bri f des ripti f exch ge trans cti n. Exclude transactions betwee you yo r pouse, d pe d nt children, the p rchas or l f yo p ra l re d unles it g erated re tal income. If ly port f asset l sold please choose parti l sale as th typ f transaction.

Capital Gains. If sales transacti esulted in capital gai th t exceed d $200 check th capital gains box, nles it was n asset l tax-d ferred acco t, d di l se the pital gai i m Sch d le A.

Colum K l s f ssets lely h ld by you po se d p nd nt hild

SP DC JT	Asset	Type of Transaction: P h	S l	P rtl l Sal	Ex hang	Ch k Box if Capit l G l Exc d d $200	Date (MO/DA/YR) Q arterly M nthly Bi-we kly if pplicabl	Amount of Transaction: A $1 001 $15 000	B $15 001 $50 000	C $50 001 $100 000	D $100 001 $250 000	E $250 001 $500 000	F $500 001 $1 000 000	G $1 000 001 $5 000 000	H $5 000 001 $25 000,000	I $25 000 001 $50 000 000	J Ove $50 000 000	K Ove $1 000 000 /Sp a/DC
SP	*Exampl* M g Corp Sto k			X		X	3/9/25		X									
See Attached																		

Use additional sheets if more space is required

SCHEDULE C – EARNED INCOME

Name George Whitesides

List the source, type and amount of earned income from any source (other than the filer's current employment by the U S government) totaling $200 or more during the reporting period For a spouse list the source and amount of any honoraria list only the source for other spouse earned income exceeding $1 000 See examples below

EXCLUDE. Military pay (such as National Guard or Reserve pay) federal retirement programs and benefits received under the Social Security Act.

INCOME LIMITS and PROHIBITED INCOME Be advised that the outside earned income limit and prohibitions on types of income may apply to you after you are on House payroll. The 2025 limit on outside earned income for Members and employees compensated at or above the senior staff" rate was $33 285 The 2026 limit is $33 855 In addition certain types of income (notably honoraria director's fees and payments for professional services involving a fiduciary relationship) are totally prohibited for Members and senior staff

	Source (include date of receipt for honoraria)	Type	Amount
Examples	Keen State	Approved T hing Fee	$6,000
	State of M ryland	Legislative Pensi	$18,000
	Civil W Roundtable (Oct. 2)	Sp se Speech	$1 000
	Ontario Co ty Board of Educati	Sp se Salary	N/A

Use additional sheets if more space is required

SCHEDULE D – LIABILITIES

Name George Whitesides | Page 12 of 30

Report liabilities of over $10 000 owed to any one creditor *at any time* during the reporting period by you your spouse or your dependent child **Mark the highest amount owed during the reporting period** **Members** Members are required to report all liabilities secured by real property including mortgages on their personal residence **Exclude** Any mortgage on your personal residence (unless you rent it out or are a Member) loans secured by automobiles household furniture or appliances liabilities of a business in which you own an interest (unless you are personally liable) and liabilities owed to you by a spouse or the child parent, or sibling of you or your spouse Report a ***revolving charge account*** (i e credit card) only if the balance at the close of the reporting period exceeded $10 000 Column K is for liabilities held solely by your spouse or dependent children

SP DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability A $10 001 $15 000	B $15 001 $50 000	C $50 001 $100 000	D $100 001 $250 000	E $250 001 $500 000	F $500 001 $1 000 000	G $1 000 001 $5 000 000	H $5 000 001 $25 000 000	I $25 000 001 $50 000 000	J Over $50 000 000	K Over $1 000 000 (Spouse/DC LI bility)
	Exampl First B k f Wilmington, DE	5/25	M rtgage Ra tal Prop rty Dove DE				X							
JT	UBS	5/20	Mortgage							X				
JT	UBS	5/22	Mortgage							X				

SCHEDULE E – POSITIONS

Report all positions compensated or uncompensated held during the current or prior calendar year as an officer director trustee of an organization partner proprietor representative employee or consultant of any corporation firm partnership or other business enterprise nonprofit organization labor organization or educational or other institution other than the United States **Exclude** Positions held in any religious social fraternal, or political entities (such as political parties and campaign organizations) and positions solely of an honorary nature

Position	Name of Organization
Board Chairman (not current)	Megafire Action
Partner (not current)	Convective Capital
Board Member (not current)	Antelope Valley Economic Development & Growth Enterprise
Co-Founder (not current)	Mission AstroAccess
Co-Founder (not current)	Aerospace Workshop, B3K Prosperity
Space Innovation Council (not current)	CalTech

Use additional sheets if more space is required

SCHEDULE D – LIABILITIES

Name George Whitesides

Report liabilities of over $10 000 owed to any one creditor ***at any time*** during the reporting period by you your spouse or your dependent child **Mark the highest amount owed during the reporting period Members** Members are required to report all liabilities secured by real property including mortgages on their personal residence **Exclude** Any mortgage on your personal residence (unless you rent it out or are a Member) loans secured by automobiles household furniture or appliances liabilities of a business in which you own an interest (unless you are personally liable) and liabilities owed to you by a spouse or the child parent, or sibling of you or your spouse Report a ***revolving charge account*** (i e credit card) only if the balance at the close of the reporting period exceeded $10 000 Column K is for liabilities held solely by your spouse or dependent children

SP DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability A $10 001 $15 000	B $15 001 $50 000	C $50 001 $100 000	D $100 001 $250 000	E $250 001 $500 000	F $500 001 $1 000 000	G $1 000 001 $5 000 000	H $5 000 001 $25 000 000	I $25 000 001 $50 000 000	J Ov r $50 000 000	K Over $1 000 000 (Spouse/DC Liability)
	Exampl First Bank f W lmington, DE	5/25	M rtgage Re tal Prop rty D ve DE				X							

SCHEDULE E – POSITIONS

Report all positions compensated or uncompensated held during the current or prior calendar year as an officer director trustee of an organization partner proprietor representative employee or consultant of any corporation firm partnership or other business enterprise nonprofit organization labor organization or educational or other institution other than the United States **Exclude** Positions held in any religious social fraternal or political entities (such as political parties and campaign organizations) and positions solely of an honorary nature.

Position	Name of Organization
Advisory Council (not current)	Mechanical and Aerospace Engineering Department, Pr nceton University
Specific Advisory Board (not current)	Space-Based Solar Power Project, CalTech
Mentor (Not current)	Matthew Isakowitz Fellowship Program
Advisory Council Member (Not current)	Aurelia Institute
Manager (Not current)	Bluebird B LLC
Mentor (Not current)	Brooke Owens Fellowship

Use additional sheets if more space is required.

SCHEDULE D – LIABILITIES

Name George Whitesides | Page 14 of 30

Report liabilities of over $10 000 owed to any one creditor ***at any time*** during the reporting period by you your spouse or your dependent child **Mark the highest amount owed during the reporting period** **Members** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude.** Any mortgage on your personal residence (unless you rent it out or *are a Member) loans secured by automobiles household furniture or appliances liabilities of a business in which you own an interest (unless you are personally liable) and liabilities owed to you by a spouse* or the child parent, or sibling of you or your spouse Report a ***revolving charge account*** (r e credit card) only if the balance at the close of the reporting period exceeded $10 000 Column K is for liabilities held solely by your spouse or dependent children

SP DC JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability A $10 001 $15 000	B $15 001 $50 000	C $50 001 $100 000	D $100 001 $250 000	E $250 001 $500 000	F $500 001 $1 000 000	G $1 000 001 $5 000 000	H $5 000 001 $25 000 000	I $25 000 001 $50 000 000	J Over $50 000 000	K Over $1 000 000 (Spouse/DC Liability)
	Exampl First Ba k f Wilm gt n, DE	5/25	M rtgage Rental Property Dove DE				X							

SCHEDULE E – POSITIONS

Report all positions compensated or uncompensated held during the current or prior calendar year as an officer director trustee of an organization partner proprietor representative employee or consultant of any corporation firm partnership or other business enterprise nonprofit organization labor organization or educational or other institution other than the United States **Exclude** Positions held in any religious social, fraternal, or political entities (such as political parties and campaign organizations) and positions solely of an honorary nature

Position	Name of Organization
Chairman (Not current)	Space Advisory Board, Virgin Galactic
Advisory Board (Not current)	Alliance for SoCal Innovation
Member	Osprey Circle LLC
Member	Space Love LLC
Advisory Council Member (Not current)	Giant Magellan Telescope

Use additional sheets if more space is required

SCHEDULE F – AGREEMENTS

Name George Whitesides | Page 15 of 30

Identify the date parties to and general terms of any agreement or arrangement that you have with respect to future employment· a leave of absence during the period of government service continuation or deferral of payments by a former or current employer other than the U S government; or continuing participation in an employee welfare or benefit plan maintained by a former employer

Date	Parties to Agreement	Terms of Agreement
2020	Virgin Galactic LLC, Virgin Galactic Holdings, George Whitesides	Tickets (2) for rocket-powered space flight

SCHEDULE G – GIFTS

Report the source (by name) a brief description and the value of all gifts totaling more than $480 received by you your spouse or your dependent child from any source during the year **Exclude** Gifts from relatives gifts of personal hospitality from an individual (which may not include a registered lobbyist or foreign agent) local meals and gifts to a spouse or dependent child that are totally independent of his or her relationship to you Gifts with a value of $192 or less need not be added towards the $480 disclosure threshold **Note** The gift rule (House Rule 25 clause 5) prohibits acceptance of gifts except as specifically provided in the rule and some gifts require prior approval of the Committee on Ethics

Source		Description	Value
Example.	M Joseph Smith, Arlington, VA	Silver Platt (prio d terminati f p rsonal friendship received from th Committee Ethics)	$500

Use additional sheets if more space is required

SCHEDULE H – TRAVEL PAYMENTS and REIMBURSEMENTS

Name George Whitesides

Identify the source and list travel itinerary dates and nature of expenses provided for travel and travel-related expenses totaling more than $480 received by you your spouse or your dependent child during the reporting period Indicate whether a family member accompanied the traveler at the sponsor's expense Disclosure is required regardless of whether the expenses were paid directly by the sponsor or were paid by you and reimbursed by the sponsor

EXCLUDE. Travel related expenses provided by federal, state and local governments or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U S C § 7342) political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to the filer

	Source	Date(s)	City of Departure-Destination-City of Return	Lodging? (Y/N)	Food? (Y/N)	Family Member Included? (Y/N)
Examples:	Government of China (MECEA)	Aug. 6-11	DC-Beijing, China-DC	Y	Y	N
	Habitat for Humanity (Charity Fundraiser)	Mar 3-4	DC-Boston-DC	Y	Y	Y

Use additional sheets if more space is required.

SCHEDULE I – PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

Name George Whitesides

List the source, activity (i e speech appearance or article) date and amount of any payment made by the sponsor of an event to a charitable organization in lieu of paying an honorarium to you A separate confidential list of charities receiving such payments must be filed directly with the Committee on Ethics

	Source	Activity	Date	Amount
Examples	Association of American Associations Washington DC	Speech	Feb 2 2025	$2 000
	XYZ Magazine	Article	Aug. 13, 2025	$500
(SP) UNS TO SPACEKIND FOUNDATION		CONSULTING	JUNE 6, 2025	$ 1200

Use additional sheets if more space is required

FILER NOTES
(Optional)

Name George Whitesides	Page 18 of 30

NOTE NUMBER	NOTES

Use additional sheets if more space is required

Sub Holding of	Date	Amount of Transaction	Asset Type	Type of Transaction	Recurring	Partial Transaction?	Asset Class	Comment
George Whitesides IRA	2/6/2025	$1,000 $15,000	SELECT SECTOR SPDR TR FINANCIAL XLF	P			ETF	T conti ue best practices, these transacti ns reflect purch ses sales of passive ETFs or mutual funds.
George Whitesides IRA	2/6/2025	$1,000 $15,000	ISHARES TR EXPANDED TECH-SOFTWARE SECTORETF IGV	P			ETF	T continue best practices, these transactions reflect purchases or sales f pa sive ETFs mutual fund
Georg Whitesides IRA	2/6/2025	$1,000 $15,000	INVESCO EXCHANGE-TRADED FD TR S&P 500 QUALITY ETF SPHQ	P			ETF	T continue best practices, these transacti ns reflect purchases or sales f passive ETFs mutu l funds.
Georg Whitesi es IRA	2/6/2025	$15,001 $50,000	SELECT SECTOR SPDR TR TECHNOLOGY XLK	S		Yes	ETF	T continue best practices, these transactions reflect purchases or sales f passive ETFs mutual funds.
Ge rg Whitesides IRA	2/20/2025	$1,000 $15,000	INVESCO EXCHANGE-TRADE FD TR S&P 500 QUALITY ETF SPHQ	P			ETF	T continue best practices, these transactions reflect purchases or sales f passive ETFs mutual funds.
George Whitesides IRA	2/20/2025	$1,000 $15,000	MFS INTERNATIONAL GROWTH FUND CLASS I MQGIX	P			Mutual Fund	T continue best ractices, these transacti ns reflect purchases or sales f passive ETFs or mutual funds.
George Whitesides IRA	2/20/2025	$15,001 $50,000	AMERICAN CENTY ET TR A ANTIS U S SMALLCAP VALUE ETF AVUV	S		N	ETF	T continue best practices, these transacti ns reflect purchases sales f passive ETFs or mutual funds.
George Whitesides IRA	3/26/2025	$15,001 $50,000	MFS INTERNATIONAL GROWTH FUND CLASS I MQGIX	P			Mutual Fund	T continue be practices, these transacti ns reflect purch es sales f passive ETFs or mutual funds.
George Whitesides IRA	3/26/2025	$15,001 $50,000	ISHARES TR CORE S&P SMALL-CAP ETF IJR	S		N	ETF	T continue best practices, these transactions reflect purchases sales f passive ETFs mutual funds.
Georg White ides RA	3/31/2025	$1,000 $15,000	VANGUARD INDEX FDS S&P 500 ETF SHS NEW VOO	P	es Quarterly		ETF	Transaction occurred utomatic reinvestment of dividends received Int passive ETFs or mutual funds fte transitioning ut f sing stocks, pe best practices.
G rge Whitesides IRA	4/22/2025	$1,000 $15,000	SPDR SER TR S&P 500 HIGH DIVID ETF SPYD	P			ETF	T continue best practices, these transactions refl ct purchases sales f passive ETFs or mutual funds.
Georg Whitesides IRA	4/22/2025	$1,000 $15,000	MFS INTER TIONAL GROWTH FUND CLASS I MQGIX	P			Mutual Fund	T continue best practices, these transactions refl ct purchases sales of passive ETFs mutual funds.
George Whitesides IRA	4/22/2025	$1,000 $15,000	PACER FDS TR US CASHCOWS 100 ETF COWZ	S		N	ETF	T co tinue best practices, these transacti ns reflect purchases sales f passive ETFs or mutual fund
George Whitesides IRA	6/26/2025	$1,000 $15,000	ISHARES TR EXPAN E TECH-SOFTWARE ECTORETF IGV	P			ETF	T continue best practices, these transacti ns reflect purchases sales f passive ETFs mutual funds.
George Whi esides IRA	6/26/2025	$15,001 $50,000	INVESCO EXCHANGE TRADE FD TR S&P 500 QUALITY ETF SPHQ				ETF	T continue best practices, these transactions reflect urchases sales f passive ETF mutual funds.
Georg Whitesides IRA	6/26/2025	$15,001 $50,000	SELECT SECTOR SPDR TR FINANCIAL XLF	P			ETF	T continue best practices, these transactions reflect purchases sales of passive ETFs mutual funds.
G rge Whitesides IRA	6/26/2025	$15,001 $50,000	SELECT SECTOR SPDR TR TECHNOLOGY XLK	P			ETF	T continue best practices, these transacti ns reflect purchases sales f passive ETF mutual funds.

George Whiteside RA	6/26/2025	$1,000 $15,000	SELECT SECTOR SPD TR EALTH CAR XL	S			ETF	T continue best practices, these transactions reflect purchases sales f passive ETFs mutual funds.
George Whiteside RA	6/26/2025	$15,001 $50,000	ISHARES TR MSCI USA QUALITY FACTOR ETF QU			Yes	ETF	T continue best practices, these transactions reflect purchases sales f passive ETFs or mutual funds.
George Whiteside RA	6/26/2025	$15,001 $50,000	ISHARES TR CORE S&P MI -CAP ETF IJH	S			ETF	T continue best practices, these transactions reflect purchases sales f passive ETFs or mutual funds.
Ge rge Whiteside RA	7/3/2025	$1,000 $15,000	ISHARES TR EXPANDED TECH-SOFTWAR SECTORETF IGV				ETF	T continue best practices, these transactions reflect purchases sales f passive ETF mutual funds.
George Whiteside RA	7/3/2025	$1,000 $15,000	SELECT SECTOR SPDR TR FINANCIAL XLF				ETF	continue be practices, these transactions reflect purchases sales f pa ive ETFs or mutua funds.
George Whiteside RA	7/3/2025	$1,000 $15,000	NVESC QQQ IT SER 1 QQQ				ETF	T co tinue best practices, these transacti ns reflect urcha es les of passiv ETF or mutual funds.
George Whiteside RA	7/3/2025	$1,000 $15,000	SELECT SECTO SPD TR TECHNOLOGY XLK				ETF	continue best practices, these transactions reflect purchases sales f passive ETFs mutual funds.
George Whiteside IRA	7/3/2025	$1,000 $15,000	SPD SER TR S&P 500 HIGH DIVI ETF SPYD	S			ETF	continue best practices, these transactions reflect purcha es sa es of passive ETF mutual funds.
George Whiteside IRA	7/3/2025	$15,00 $50,000	SSGA ACTIVE ETF TR SPDR BLACKSTONE SR LN ETF SRLN	S			ETF	continue best practices, these transactions reflect purchases sales f passive ETFs mutu l funds.
George Whiteside RA	7/3/2025	$1,000 $15,000	DOU LELINE CO E FIXE NCOM FU CLASS I BLFX				Mutual Fund	To continue best practices, these transactions reflect purchases sa es passive ETFs or mutua funds.
George Whiteside RA	9/15/2025	$1,000 $15,000	SELECT SECTO SPDR TR NANCIAL XLF	P			ETF	continue best practices, these transactions reflect purchases sale passive ETF mutual funds.
George Whiteside RA	9/15/2025	$15,001 $50,000	SELECT SECTOR PD TR TECHNOLOGY XLK				ETF	T continue best practices, these transactions reflect purchases sales f passive ETFs or mutual funds.
George Whiteside RA	9/15/2025	$15,001 $50,000	NVESCO EXCHANGE-TRADED FD TR S&P 500 QUALITY ETF SPHQ			es	ETF	T continue best practices, these transactions reflect purcha es sales f passive ETFs mutual fund
George Whiteside RA	11/26/2025	$1,000 $15,000	NVESCO EXCHANGE TRADE FD TR S&P 500 QUALITY ETF SPHQ				ETF	T continue best practi es, these transactions reflect urchases sales f passive ETFs mutual funds.
George Whiteside RA	11/26/2025	$1,000 $15,000	MFS NTERNA ONAL GROWTH FUND CLASS MQGIX				Mutual Fund	co tinue best practices, these transa ns reflect purchases sales passive ETFs mutual funds.
George Whiteside RA	1 /26/2025	$1,000 $ 5,000	NVESC EXCHANGE-TRADED FD TR S&P 500 QUAL WEIGHT ETF RSP	P			ETF	continue best practices, these transactions reflect purchase sales f passive ETF or mutua funds.
Ge rge Whiteside RA	11/26/2025	$15,001 $50,000	ISHARES TR EXPANDED TECH-SOFTWAR SECTORETF ISV	S			ETF	T continue best practices, thes transactions reflect purchases or sales f passive ETF or mutua funds.
George Whiteside	12/17/2025	$1,000 $15,000	MFS NTERNATI AL GROWTH FU D CLASS I MQGIX	P			Mutual Fund	Transacti ccurred an utomatic reinvestme f dividends receive into passive ETF mutua funds fter transitioning ut f single stocks, per best practices.

Sub Holding of	Date	Amount of Transaction	Asset Type	Type of Transaction	Recurring	Capital Gains Exceeded $200?	Partial Transaction	Asset Class	Comment
Cormorant est rust (SP)	7/3/202	$100,001 $250,000	INVESCO QQQ TR NIT SER QQQ					ETF	continue best practices, these transactions reflect purchases sales of passive ETFs or mutua funds.
Cormora est rust (SP)	7/3/2025	$15,001 $50,000	ISHARES TR COR S&P SMALL-CAP ETF UR			es	No	ETF	continue best practices, these transactions reflect purchases sales of passive ETFs or mutual funds.
Cormora est rust (SP)	7/3/2025	$15,001 $50,000	ISHARES TR CORE S&P MID-CAP ETF IJH			es		ETF	T continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Cormora est Trust (SP)	7/21/2025	$100,001 $250,000	VANGUARD DEX FDS S&P 500 ETF SHS EW VOO					ETF	continue best practices, these transactions reflect purchases les of passive ETF or mutua funds.
Cormorant est Trust (SP)	7/21/2025	$100,001 $250,000	ISHARES TR MSCI SA QUALITY ACTOR ETF QUAL			es	es	ETF	continue best practices, these transactions reflect purchases sales of passive ETFs or mutua funds.
Cormorant est rust (SP)	9/23/2025	$1,000 $15,000	VANGUARD NTL EQUITYINDEX FDS ANGUARD FTSE ALL WORLD EX USETF VEU					ETF	nsactio ccurred as an utomatic reinvestment dividends receive into passive ETFs mutua funds after transitioning out of single stocks, per best practices.
Cormorant est Trust (SP)	/24/2025	$1,000 $15,000	VANGUARD WHITEHALL FDS HIGH DIVI EN ELD ETF SHS VYM					ETF	nsaction occurred as utomatic reinvestment of dividends received into passive ETFs mutual funds after transitioning out of single stocks, per best practices.
Cormorant est rust (SP)	9/25/2025	$1,000 $15,000	INVESCO EXCHANGE-TRADED FD TR S&P 500 EQUAL WEIGHT ETF RSP					ETF	nsaction ccurred as utomatic reinvestment dividends received into passive ETFs mutual funds after transitionin out of single stocks, pe best practices.
Cormora est Trust (SP)	/25/2025	$1,000 $15,000	INVESCO EXCHANGE-TRADED FD TR S&P 500 QUALITY ETF SPHQ					ET	Transaction occurred as utomatic reinvestment of dividends received into passive ETFs mutua unds after transitioning out of single ocks, per best practices.
Cormora est rust (SP)	/1/2025	1,000 $15,000	VANGUARD INDEX FDS S&P 500 ETF SHS NEW VOO					ETF	ransaction occurre as automatic reinvestment of dividends received into passive ETFs or mutua funds after transitioning out of rgle stocks, per best practices.
Cormorant est rust (SP)	10/2/2025	1,000 $15,000	VANGUARD DEX FDS VAN UARD VALUE ETF VTV					ET	ransactio occurred as an utomatic reinvestment of dividends received into passive ETFs or mutua funds after transitioning out of single stocks, per best practices.
Cormora est rust (SP)	/2/2025	$1,000 $15,000	ANGUARD WORLD FD ANGUARD EGA CAP ALU ETF MGV					ETF	nsaction occurred as automatic reinvestment of dividends received into passive ETFs or mutual funds after transitioning out f rgle ocks, per best practices.

Sub Holding of	Date	Amount of Transaction	Asset Type	ype of ransaction	Recurring	Capital Gains Exceeded	Partial Transaction?	Asset Class	Notes	Comment
Loretta Whiteskies Individual (SP)	3/24/2025	$100,00 $250,000	ANGUARD INDEX FDS ANGUARD SMALL-CAP ALU ETF VBR			Yes	No	ETF		continue best practices, transactions reflect purch es or sales of passive ETFs or utual unds.
Loretta Whiteskies Individual (SP)	3/24/2025	$250,00 $500,000	ANGUARD INDEX FDS MID-CAP GROWTH ETF VOT			es	No	ETF		continue best practices hes transactions reflect purchases or sales of passive ETF or mutual funds.
Loretta Whiteskies Individual (SP)	3/24/2025	100,00 $250,000	AN UARD INTL EQUITYINDEX FDS FTSE ALL-WORLD EX USA SMALL CAP INDEX VSS			Yes	No	ETF		T cont ue bes practices, these transactions reflect purchases sa of pas ETFs or utual funds.
Loretta Whiteskies Individual (SP)	3/24/2025	250,00 $500,000	ANGUARD INDEX FDS ANGUARD MID-CAP ALUE ETF VOE			es	No	ETF		continue best practices, hes transactions reflect purchases or of passive ETFs or mutual funds.
Loretta Whiteskies Individual (SP)	3/24/2025	$15,00 $50,000	ANGUARD INDEX FDS ANGUARD ALUE ETF VTV			es	es	ETF	Ass Moved to Cormorant est ust on 4/23/25.	continue best practices, these ansactions reflect purchases or sales of passiv ETF or utual funds.
Loretta Whiteskies Idual (SP)	3/24/2025	15 00 $50 000	NGUARD INTL EQUITYIN EX FDS AN ARD FTS ALL WORLD EX USETF VEU			Yes	es	ETF	Asset Moved to Cormorant est Trust on 4/23/25.	continue best practices, these transactions reflect purchases or sales of passive ETFs or utual unds.
Loretta Whiteskies Individual (SP)	3/24/2025	$250,00 $500,000	GUARD INTL EQUITYINDEX FDS FTSE EMERGING KTS ETF VWO			es		ETF		continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
Loretta Whiteskiesd Individual (SP)	/24/2025	$1,000 $15,000	ANG ARD WHITEHALL FDS DIVIDEND YIELD ETF SHS VYM			es	es	ETF	Asset Moved to Cormorant est rus on 4/23/25.	continue best practices, these transactions reflect purchases or sales of passive ETFs or utual funds
Loretta Whiteskies Individual (SP)	3/24/2025	$100,001 $250,000	ANGUARD INDEX FDS VANGUARD MALL-CAP ROWTH ETF VBK			Yes	No	ETF		continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
Loretta Whiteskies Individual (SP)	3/24/2025	1,000 $15,000	ANGUARD WORLD FD ANGUARD MEG CAP LUE ETF MGV			es	es	ETF	Asset Moved to Cormorant est rust on 4/23/25.	continue best actices, these transactions reflect purchases or sales of passive ETFs utua funds.
Loretta Whiteskies Individual (SP)	3/24/2025	$500,00 $1,000,000	ANGUARD INDEX DS S&P 500 ETF SHS EW DO					ETF	Asset Moved to Cormorant est rust on 4/23/2	continue best practices, these transactions reflect purchases or sales of passive ETFs or utual unds.
Loretta Whiteskies Individual (SP)	3/24/2025	1,000 15,000	ANGUARD DEX FDS ANGUARD GROWTH ETF VU					ETF	Asset Moved Corm ant est rust on 4/23/25.	To continue best practices, these transactions reflect purchases or sales of passive ETFs or utual funds.

Loretta Whiteside Individual (SP)	3/24/2025	$250,0 $500,000	INVESCO EXCHAN E-TRADED FD TR S&P 500 QUAL WE GHT ETF RSP					ETF	Asset Moved to Cormorant est rus on /23/25.	continue best practices these transactions reflect purchases or sles of passive ETFs or mutual unds.
Loretta Whiteside ndividual (SP)	3/24/2025	$50,00 100,000	NVESCO QQQ TR SE QQQ					ETF	Asset owed to Cormorant est rust /23/2	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Loretta W Iteside Individual (SP)	3/24/2025	$1,000 $15,000	ANG ARD WORLD D ANGUARD M CAP GROWTH ETF M					ETF	Asset Moved to Cormorant est rust on 4/23/25.	continue bes practices, these ansactions reflect purchases or sales of passive ETFs or mutual funds.
Loretta Whiteside Individual (SP)	3/24/2025	$150,001 00,000	ISHARES TR MSCI USA QUALITY ACTO ETF QUAL					ETF	Asset Moved to Cormorant Nest rus on /23/25	continue best practices, these ansactions reflect purchases or sales of passive ETFs or mutual funds.
Loretta Whites des dividual (SP)	3/24/2025	$15,00 $50,000	ISHARES TR CORE S& SMALL-CAP ETF IR					ETF	Asset Moved to Cormorant est Trust on /23/25.	continue best practices, these transactions reflect purchases or sales of passive ETF or mutual unds.
Loretta Wh esides dividual (SP)	3/24/2025	$250,001 $500,000	NVESCO EXCHANG TRADED TR S& 500 QUALITY ETF SPHQ					ETF	Asset Moved to Cormorant est rust on 4/2 /25.	continue bes practices, these transactions reflect purchases or sales of passiv ETFs or mutual unds.
Loretta Whiteside Individual (SP)	3/24/2025	$15,00 $50,000	ISHARES TR CORE S& MID-CAP ETF IJH					ET	Asset Moved to Cormorant est rus on 4/23/25.	continue bes practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
Loretta Whiteside Individual (SP)	3/25/2025	$100,00 $2 ,000	INNOVIV IN COM INV				No	Stock		avoi any possible onflicts of interest with my future Congression work, transitioned single stock, company-specific holdings into passive ETF an mutual funds, per best practices.
Loretta Whites des dividual (SP)	3/25/2025	100,00 $25 ,000	INNOVIV NC COM INV			es		Stock		avoid any possible conflicts of interes with my future Congressional work, transitioned my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
Loret W div ual (SP)	3/3 /2025	$1,000 $15,000	NGUARD INDEX FDS GUARD ALUE ETF VTV					ETF	Asset Moved to Cormorant est Trus on 4/23/2	Transaction occurred as an automatic reinvestment of dividends eceived int passiv ETFs or utual funds after transitioning out of single stocks, per best practices.
Loretta Wh es es Individual (SP)	3/3 /2025	$1,000 $15,000	ANGUARD INDEX DS S&P 500 ETF SH EW VOO					ETF	Asset Moved to Cormorant est Trust on 4/23/25.	ransaction occurred as an automatic reinvestmen of dividends received into pas ive ETFs or utual funds after transitioning out of ngle stocks, per best practices.
Loretta Whiteside Individual (SP)	3/3 /2025	$1,000 $15,000	ANGUARD WORLD FD ANGUARD MEGA CAP AUE ETF MGV					ETF	Asset Moved Cormorant est Trust on 4/23/2	ansaction occurred as an automatic reinvestmen of ividends received nto passive ETFs or utua funds er transitioning out of singl stocks, per best practices.

Sub Holding of	Date	Amount of Transaction	Asset Type	Type of Transaction	Recurring	Capital Gains Exceeded $200?	Partial Transaction	Asset Class	Notes	Comment
Bluebird Trust	7/23/2025	$50,001 $100,000	SELECT ECTORSPDR TRTECHNOLOGY XLK					ETF		continue best practices, these transactions refl purchases or sales of passive ETFs or mutual funds.
uebird rust	7/23/2025	$15,001 $50,000	NVESCO QQQ TR UNIT SER QQQ					ETF		To continue best practices, these transactions re ect purchases or sales of passive ETFs or mutual funds.
uebird Trust	/23/2025	$50,001 $100,000	JPMORGAN ULTRA SHORT MUNICI AL FUND CLASS USMTX			Yes	es	Mutual und		continue best practices, these ransactions reflect urchases or sales of passive ETF or mutual funds.
uebird B Trust	7/29/2025	$50,001 $100,000	SELECT SECTO SPDR TR TECHNOLOGY XLK					ETF		continue best practices, these transactions reflect purchases or sales of passive ETFs or utua funds
Bluebird Trust	7/29/2025	$50,001 $100,000	JPMORGAN ULTRA HORT MUNICIPAL FUN CLASS USMTX			Yes	es	Mutual und		continue best practices, these transactions reflect punch es or sales of passive ETF or mutual funds.
bird rust	7/30/2025	$1,000 $15,000	JPMORGAN ULTRA HORT MUNI AL FUN CLASS USMTX					Mutual und		ransaction occurred as an automatic reinvestment of ends received into passive ETFs or mutua funds after transitioning out of singl stocks, per best practices.
luebird Trust	8/1 /2025	$15,001 $50,000	JPMORGAN ULTRA HORT MUNI AL FUND CLASS USMTX			es	Yes	Mutual und		continue best practices, these transactions reflect purchases or sales of passive ETF or mutual funds.
ebird rust	8/13/2025	$100,001 $250,000	SELECT SECTOR SPDR TR TECHNOLOGY XLK					ETF		To continue best practices, these transactions reflect purchases or sales passive ETFs or mutual funds.
uebird rust	8/13/2025	$50,001 $100,000	JPMORGAN ULTRA HORT UNICI AL FUN CLASS USMTX			es	es	Mutual und		continue best practices, these transactions ect purchases or sales of passive ETF or mutual funds
uebird rust	9/9/2025	$15,001 $50,000	AMERICAN GROWTH FUN OF AMERICA CLASS F3 GAFFX					Mutual und	Sh class conve on of AGTHX to GAFFX on /13/25. GAFFX moved to Bluebi Trust on /21/25.	continue best practices, these transactions reflect purchases or sales passive ETF or mutual funds.
ue rd rust	9/9/2025	$50,001 $100,000	SELECT SECTOR SPDR TR FINANCIAL XLF					ETF		continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Bluebird rust	9/9/2025	$50,001 $100,000	JPMORGAN ULTRA SHOR MUNI AL FUND CLASS USMTX			es	es	Mutual nd		cont best rectices, these transactions refla purchases or sales passive ETFs or mutu funds.
ue rd Trust	9/18/202	$1,000 $15,000	AMERICAN WASHINGTON MUTUAL INVESTORS FUND CLASS F3 FWMIX					Mutual Fund		Transaction occurred as automatic reinvestment of dividen rece into passive ETFs or mutua funds fter transitioning out of ngl stocks, per best practices.
uebird Trust	9/26/2025	$1,000 $15,000	IN ESCO EXCHANGE-TRADED TR S&P 500 EQUAL WEIGHT ETF RS					ETF		Transaction occurred as an utomatic reinvestme nt of dividends received into passive ETFs or utual funds after transitioning out of singl stocks, per best practices.
Blue rd Trust	10/2/2025	$50,001 $100,000	CAPITAL GR UP GROWTHETF SHS CGGR					ETF		continu best practices, these ransactions reflect purchas or sa es of passive ETFs or mutual funds.
ue rd rust	0/2/2025	$15,001 $50 000	ELECT CTO SPD TR TECHNOLOGY XLK					ETF		continue best practices, these transactions flect purchases or sal of passive ETF or mutual funds.
Bluebird rust	0/2/2025	$50,001 $100,000	JPMO GAN ULTRA SHORT MUNI AL FUN CLASS USMTX			Yes	es	Mutual Fund		continue best practices, these transactions flect purchases or sales passive ETFs or mutual funds.

Bluebird rust	0/9/2025	$50,001 $100,000	CAPITAL GROUP GROWTHETF SNS CGGR					ETF		cont best practices, these transaction refle purchases sale f passive ETFs mutual funds.
uebird T st	10/9/2025	$50,001 $100,000	JPMORGAN ULTRA SHOR MUNICIPAL FUND CLASS USMTX			Yes	Yes	Mutual Fund		con nue be practice these transactions refl urchases or sales of passive ETFs mutual funds.
luebird rust	10/22/2025	$50,001 $100,000	CAPITAL GR UP GROWTHETF SNS CGGR					ETF		continue best practices, these transactions refl purchases or sales f passive ETF or mutual fund
uebird rust	10/22/2025	$50,001 $100,000	PMORGAN ULTRA SHORT MUN FUND CLASS USMTX				es	Mutual Fund		To continue best practices, these transaction refl purchases sales passive ETF utu unds.
uebird B Trust	10/28/2025	$50,001 $100,000	INVESCO QQQ TR UNIT SER QQQ					ETF		con be practices, these transactions refle rchases or sales passive ETFs mutual funds.
Blue rd Trust	0/28/2025	$15,001 $50,000	JPMORGAN ULTRA SHOR MUNICI AL FUN CLASS USMTX			es	Yes	Mutual Fund		con be practices, these transaction refl ct purchases or sal of passive ETFs mutual unds.
uebird Tru	1/ /2025	$50,001 $100,000	NVESCO QQQ TR UN SER QQQ	P				ETF		con nue best practices, these transactions refle purchase or sales passive ETF or mutual fu ds.
Blue rd rust	11/4/2025	$15,001 $50,000	JPMORGAN ULTRA SHORT MUNICIP FUND CLASS USMTX			es	Ye	Mut Fund		con nu be practice these transactions refle purchases sales of passive ETFs ut al nds.
Bl rd rust	11/26/2025	$50,001 $100,000	MFS INTERNA ONAL GROWTH FUN CLASS MOGIX					Mutual nd		To conti est practice these transactions refl rchas sales of passive ETF mutual funds.
rd Trust	11/26/2025	$50,001 $100,000	ISHARES TR EXPANDED TECH- FTWARE SECTORETF GV			es		ETF		con nue best practices, these transactions refle purchases sal passive ETFs mutual funds.
Bl bird rust	12/9/2025	$15,001 $50,000	INVESCO EXCHANGE-TRADED TR S&P 500 EQUAL WEIGHT ETF RSP	P				ETF		con nu best practices, these transactions re purchases or sal passive ETF mutual funds.
uebird Trust	2/9/2025	$1,000 $15,000	ELECT SECTOR SPDA TR ST TE STREET FINLSELECT SECTOR SP ETF XLF					ETF		con nu best practices, these transaction re ct purchases or sales passive ETF m tual fu ds.
Blue rd Trust	12/9/2025	$1,000 $15,000	ISHARES TR RUSSELL 3000 ALUE ETF IWD					ETF		con best practices these transactions refl purchases or sales f passive ETF or mutual funds.
bird Tru	12/9/2025	$15,001 $50,000	JPMORGAN ULTRA RT MUNICIPAL FUN CLASS USMTX			Yes	Yes	Mutual F nd		To con be practices, these transaction re urchas sal f passive ETFs or mutual funds.
Bl bird ru	12/17/2025	$1,000 $15,000	MFS NTERNATIO AL GROWTH FU CLASS MOGI					Mutual nd		ransaction occurred as an utomatic re vestm of ivid nds rece ve nto passive ETFs or utual fund after transitioning ut of singl stocks, er best practice
uebi rust	2/18/2025	$100,001 $250,000	AMERICAN GROWTH FUND AMERICA CLASS GAFFX					Mutual d		Transaction occurred as an automati reinvestme of dividends received to passive ETFs al fund afte transitioning ut of singl stocks, pe best practices.
Blu rd Trust	2/19/2025	$1,000 $15,000	ISHARES TR MSCI USA QUALITY ACTO ETF QUAL					ETF		Transaction occurre as an automatic reinvestm of divid ds rece ve l to passive ETFs or m tual fund afte transitioning ut of gl stocks, per best ractice
Bl rd Trust	2/31/2025	$1,000 $15,000	NVESCO QQQ TR UN SER QQQ					ETF		ransacti occurre as an automatic re nvestm f divid ds ve Into passive ETFs or mutual fund afte transitioning out of singl stocks, per be practice

Sub Holding of	Date	Amount of Transaction	Asset Type	Type of Transaction	Recurring	Capital Gains Exceeded	Partial Transaction?	Asset Class	Comment
Hummingbird Circle rust	/30/2025	$1,000 $15,000	JPMORGAN 1TRA SHORT MUNICIPAL FU CLASS SMTK		es Monthly			Mutua Fund	ransaction occurred as an automatic reinvestment dividends received into passive ETFs or mutua unds after tra ntionin ut of single stocks, per best pra ices.
Hummingbird Circle rust	2/20/2025	$1,000 $15,000	NVESCO EXCHAN TRADED FD S&P 500 QUALITY ETF SPHQ					ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs mutual unds.
ummingbird Circle Trust	2/20/2025	$1,000 $15,000	AMERICAN CENTY ETF TR AVANTIS SMALLCAP VALU ETF AVUV				No	ETF	continue best practices, these transactions reflect purchases sales of passive ETFs or mutual unds.
Hummingbird Circle rust	3/25/2 25	$1,000 15,000	ANGUARD WORLD FD ESG STOCK ETF ESGV		es Qua erly			ETF	nactio ccurred as automatic reinvestment of dividends received into passive ETFs or mutual unds after rans ninst out of single stocks cer bes practices.
ummingbird Circle rust	3/26/2025	$50,001 $100,000	WCM FOCUSED INTERNA ONAL GROWTH FUN INSTITUTIONAL CLASS WCMIX					Mutual Fund	continue best practices, these transactions reflect purchases sales of passive ETFs or mutual funds.
Hummingbird Circle rust	3/26/2025	$50,00 $100,000	ISHARES TR CORE S&P SMALL-CAP ETF UR			es		ETF	T conthue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
Hummingbird Circle rust	3/27/2025	$15,001 $50,000	WCM FOCUSED INTERNATIONAL GROWTH FUN INSTITUT NAL CLASS WCMIX					Mutual Fund	conthue best practices, thes transactions reflect purchases or sales passive ETFs or mutual funds.
Hummingbird Circle Trust	3/27/2025	$100,00 $250,000	ANGUAR WORL FD ESG STOCK ETF ESGV					ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs as mutual funds.
ummingbird Circle rust	/27/2025	$100,001 $250,000	INVESCO EXCHANGE-TRADED FD TR S&P 500 QUALITY ETF SPHQ					ETF	conthue best practices, these transactions reflect purchases or sales passive ETFs mutual funds.
Hummingbird Circle rust	3/27/2025	$15,001 $50,000	ISHARES TR RUSSEL 1000 AL ETF IWD					ETF	ntinue best practices, these transact ns reflect purchases or sales f passive ETFs or mutual funds.
Hummingbird Circle rust	3/2 /2025	1,000 15,000	NVESCO EXCHANGE-TRADED FD TR S&P 500 EQUAL WEIGHT ETF RSP					ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
Hummingbi Circle rust	3/27/2025	$100,001 $250,000	NETFLIX IN COM FLX			es		Stock	avo any possible conflicts of interest with my future Congressional work, I transitioned my single stock, company-specific holdings into passive ETFs and mutua funds, per best practices.
Hummingbird Circle rust	3/27/2025	$50,001 $100,000	PLANET LABS PBC COM CL A PL				No	Stock	avo any possible conflicts of interest with my uture Congressional work, transitioned my single stock, company-pecific ho nas int passive ETFs nd mutual funds, per best practices
Hummingbir Circle rust	3/27/2025	$15,001 $50,000	SELECT SECTOR SPDR TR TE HNOLOGY XLK			es	es	ETF	ntinue best practices, these transactions reflect purchases or sales of passive ETFs mutua funds.
Hummingbird Circle rust	3/27/2025	$15,001 $50,000	SELECT SECT SPDR TR TECHNOLOGY XLK			es	es	ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs mutual unds.
ummingbi Circle rust	/27/2 25	$15,001 $50,000	ISHARES TR CORE S&P MID-CAP ETF IJH			es	Yes	ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
ummingbird Circ rust	4/22/2 25	$1,000 $15,000	SELECT SECTOR SPDR TR NANCIAL XLF					ETF	To continue best practices, these transactions reflect purchases sales of passive ETFs mutual funds.
Hummingbird Circle Trust	4/22/2025	$1,000 $15,000	WCM FOCUSED INTERNATI NAL GROWTH FUND INSTITUTIONAL CLASS WCMIX					Mutua Fund	continue best practices, these transactions reflect purchases or sales of passive ET or mutua unds.
ummingbird Circle rust	4/22/2025	$15,001 $50,000	SPD SE TR S&P 500 HIGH DIVI ETF SPYD					ETF	continue best practices, these transacti ns reflect purchases or sales passive ETFs or mutua unds.
ummingbird Circle rust	4/22/2025	$15,00 $50,000	PACER FD TR CASHCOWS 100 ETF COWZ			es	es	ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
Hummingbird Circle rust	6/27/2025	$50,001 $100,000	SELECT SECTOR SPDR TR FINANCIAL XLF					ETF	continue best practices, these transactions reflect purchases or sales passive ETFs mutua unds.
ummingbird Circle rust	6/27/2025	$15,00 $50,000	ISHARES TR EXPAN ED TECH-SOFTWARE SECT RET GV					ET	continue best practices, hese transactions reflect purchases or sales passive ETFs mutual unds.
umm ngbird Circle rust	6/27/2025	$1,000 $15,000	SELECT SECTOR SPDR TR TECHNOLOGY XLK					ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.

umminghird Circle Trust	6/2 /2025	1,000 $15,000	INVESCO EXCHANGE TRADED FD TR S&P 500 QUALITY ETF SPHQ					ET	ransaction occurred as an automatic reinvestment dividends received into passive ETFs or mutual unds after transit. ut of single stocks, per best practices.
Hummingbird Circle rust	6/27/2025	$50,001 $100,000	SELECT SECTOR SPD TR HEALTH CARE XL			No	No	ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs mutual funds.
Hummingbird Circle rust	6/2 /2025	$50,001 $100,000	ISHARES TR RS S&P MID-CAP ETF IJH			es	Yes	ET	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Hummingbird Circle rust	7/1/2025	$50,001 100,000	ANGUARD DEX FDS S&P 500 ETF SHS EW VOO					ET	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Hummingbird Cir; Trust	/3/2025	$15,001 $50,000	SELECT SECTOR SPDR TR TECHNOLOGY XLK					ET	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Hummingbird Circle rust	7/3/2025	$15,00 $50,000	SPDR SER TR S&P 500 GH DIVI ETF SPYD			es		ETF	continue best actices, thes transactions refle purchases or sales of passive ETFs mutual unds.
Hummingbird Cir; Trust	/15/2025	$15,001 $50,000	SELECT SECTOR SPDR TR TECHNOLOGY XLK					ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Hummingbird Circle Trust	7/15/2025	$1,000 $15,000	SELECT SECTOR SPDR TR NANCIAL XLF					ETF	continue best practices, these transactions reflect purchases sales of passive ETFs or mutual funds.
Hummingbird Circle rust	/15/2025	$1,000 $15,000	ISHARES TR XPANDED TECH-SOFTWARE SECTOR ETF GV					ETF	continue best practices, hese ransactions eflect purchases or sales of passive ETFs or mutual funds.
Hummingbird Cir; rust	/15/2025	$1,000 $15,000	ANGUARD INDEX FDS S&P 500 ETF SHS NEW VOO					ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Hummingbird Circle rust	/15/2025	$15,001 $50,000	NVESCO QQQ TR UNIT SER QQQ					ETF	continue best practices, these transactions refle purchases or sales of passive ETFs mutual funds.
Hummingbird Circle rust	/ 5/2025	$1,000 $15,000	SELECT SECTOR SPD TR NDL XLI					ETF	continue best practices, these ransactions reflect purchases or sales of passive ETFs or mutual unds.
Hummingbird Circle rust	7/15/2025	$50,00 $100,000	JPMORGAN ULTRA SHORT MUNICIPAL FUND CLASS USMTX			es	es	Mutual und	continue best practices these ransactions reflect purchases or sales of passive ETFs or mutual funds.
Hummingbird Circle rust	/24/2025	$50,001 $100,000	SELECT SECTOR SPDR TR TECHNOLOGY XLK					ET	continue best practices, these ransactio reflect purchases or sales f passive ETFs mutual funds.
Hummingbird Circle rust	7/24/2025	$100,001 $250,000	VANGUARD DEX FDS S&P 500 ETF SHS EW VOO					ETF	ntinue best practices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Hummingbird Circle rust	/24/2025	$50,001 $100,000	ISHARES TR CORE S&P MID-CAP ETF IJH			Yes	No	ETF	continue best practices, these transactions eflect purchases sales of passive ETFs or mutua funds.
Hummingbird Circle rust	7/24/2025	$50,00 $100,000	JPMORGAN ULTRA SHORT MUNICIPAL FUND CLASS USMTX			es	es	Mutual und	To continue best practices, hes transactions reflect purchases or sales passive ETFs or mutual funds.
Hummingbird Circle Trust	/29/2025	$100,001 $250,000	SELECT SECTOR SPDR TR TECHNOLOGY XLK					ETF	continue best practices, these transactions reflect purchases or sales passive ETFs or mutual funds.
Hummingbird Circle rust	7/29/2025	$50,001 $100,000	JPMORGAN ULTRA SHORT MUNICIPAL FUND CLASS USMTX			es	es	Mutua und	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds
Hummingbird Circle Trust	8/1 /2025	$15,001 $50,000	PMORGAN TRA SHORT MU ICIPAL FU CLASS USMTX			es	Yes	usl und	T continue best practices, these ransactio reflect purchases or sales of passive ETFs mutual funds.
Hummingbird Circle rus	8/1 /2025	$50,001 $100,000	SELECT SECTOR SPDR TR TECHNOLOGY XLK					ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs mutual funds.
Hummingbird Circle rust	8/1 /2025	$50,001 100,000	VANGUARD INDEX FDS S&P 500 ETF SHS EW VOO					ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
Hummingbird Circle rust	8/1 /2025	$100,001 $250,000	PMORGAN TRA SHORT MU IPAL FUND CLASS USMTX			es	es	us und	continue best practices, hese ransactions reflect purchases or sales of passive ETFs mutual funds.
Hummingbird Circle Trust	/1 /202	$50,001 $100,000	AMERICAN GROWTH FUND OF AMERICA CLASS F3 GAFFX					Mutual Fund	continue best practices, these ransactions reflect purchases or sales of passive ETFs or mutual unds.
Hummingbird Circle rust	8/1 /2025	$15,001 $50,000	VANGUARD INDEX FDS S& 500 ETF SHS EW VOO					ETF	T continue best practices, these transactions reflect purchases or sales of passive ETFs mutua unds.
Hummingbird Circle rust	8/1 /2025	$100,001 $250,000	PMORGAN TRA SHORT MU CIPAL FUND CLASS USMTX			es	es	Mutual Fund	continue best actices, these transactions reflect purchases sales of passive ETFs or mutual unds.
Hummingbird Ircle rust	/3/2025	$100,001 $250,000	PMORGAN ULTRA SHORT MUNICIPAL FUN CLASS USMTX			es	es	Mutual Fund	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
Hummingbird Circle rust	9/9/2025	$15,001 $50,000	AMERICAN GROWTH FUND OF AMERICA CLASS F3 GAFFX					Mutual und	continue best practices, these transactions reflect purchases or sales passive ETFs mutual unds.
Hummingbird Circle Trust	9/9/2025	$50,001 $100,000	SELECT SECTO SPDR TR FINAN AL XL					ETF	continue best actices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Hummingbird Circle Trust	9/9/2025	$50,001 $100,000	JPMORGAN TRA SHORT MUNICIPAL FUND CLASS USMTX			es	es	Mutual Fund	continue best practices, these transactions reflect purchases or sales of passive ETFs mutual unds.
Hummingbird Circle rust	9/18/2025	$1,000 $15,000	AMERICAN WASHINGTON MUTUAL INVESTORS FUND CLASS FWMIX					Mutua Fund	ransaction occurred as an automat reinvestment dividends received into passive ETFs or mutua unds aft trans loming ut of sinel stoc , per best ora es.
Hummingbird Circle	9/1 /2025	$1,000 15,000	ISHARES TR MSCI USA QUALITY FACTOR ETF QUAL					ETF	ransaction occurred as automatic reinvestment of dividends received into passive ETFs or mutual unds after trans nine of sinel ocks, per best practices.
Hummingbird Circle Trust	/19/2025	1,000 $15,000	ISHARES TR RUSSELL 1000 VALU ETF IWD					ETF	ansaction occurred as automat reinvestment dividends eceived into passive ETFs or mutua unds fte transitioning of single stocks, per best practices.

Hummingbi Circle rust	9/25/202	$50,001 $100,000	PMORGAN ULTRA SHORT MU CIPAL FU CLASS I USMTX			es	es	Mutu Fund	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual funds.
Hummingbird Circle Trust	9/26/2025	$1,000 $15,000	INVESCO EXCHANGE TRADED FD TR S&P 500 EQUAL WEIGHT ETF RSP					ETF	Transactio urred as automatic reinvestment dividends received into passive ETFs or mutua unds or transitioning of single stocks, per best practices.
Hummingbird Circle rust	0/1/2025	$1,000 $15,000	ANGUARD INDEX FDS S&P 500 ETF SHS NEW VOO					ET	nsactio occurred as automatic reinvestment of dividends received into passive ETFs or mutual funds fter transitioning out single stocks, per best ar ctices.
Hummingbird Circle Trust	10/2/2025	$15,00 $50,000	SELECT SECTOR SPD TR TECHNOLOGY XLK	P				ETF	ontinue best practices, these transactions reflect purchases or sales of passive ETFs mutual funds.
Hummingbir Circle rust	10/2/2025	$50,001 $100,000	CAPITAL GROU ROWTHETF SHS CGGR					ETF	*continue best practices, these transactions reflect purchases or sales of passive ETFs mutual unds.*
Hummingbir Circle rust	10/2/2025	$100,001 $250,000	PMORGAN TRA SH RT MU ICIPAL FU CLASS USMTX			es	es	Mutu und	ontinue best practices, these transactions reflect purchases or sales of passive ETFs mutual unds.
Hummingbird Circle Trust	0/9/2025	$50,001 $100,000	CAPITAL GROU GROWTHETF SHS CGGR					ETF	continue best practices, these transactions reflect purchases sales of passive ETFs or mutual unds.
Hummingbird Circle rust	0/9/2025	$50,001 $100,000	PMORGAN ULTRA SHORT MUNICI AL FU LASS USMTX			es	es	Mutual und	ontinue best practices, these transactio reflect purchases or sales passive ETFs mutua funds.
Hummingbird Circle rust	0/10/2025	$50,00 $100,000	CAPITAL GROWTHETF SHS CGGR					ETF	ontinue best practices, hese transactions reflect purchases or sales passive ETFs or mutual unds.
Hummingbird Circle rust	0/10/2025	$50,001 $100,000	PMORGAN ULTRA SHORT MUNICIPAL FU CLASS I USMTX			es	es	Mutual Fund	continue best practices, hese transactions reflect purchases sales of passive ETFs or mutual unds.
Hummingbird Circle rust	0/22/2025	$100,00 $250,000	CAPITAL GROUP GROWTHETF SHS CGGR					ETF	continue best practices, these transactions reflect purchases or sales f passive ETFs or mutual unds.
Hummingbird Circle rust	0/22/2025	$50,001 $100,000	JPMORGAN TRA SHORT MUNICIPAL FU CLASS USMTX			es	es	Mutual Fund	continue best ctices, hese transactions reflect purchases or sales passive ETF mutual unds.
ummingbird Circle rust	/28/2025	$100,00 $250,000	INVESCO QQQ TR NIT SER QQQ					ETF	ntinue best practices, these nsactions reflect purchases or sales passive ETFs or mutual unds.
Hummingbird Circ rust	10/28/202	$50,00 $ 00,000	JPMORGAN ULTRA SHOR MU ICI AL FU LASS USMTX			es	Yes	Mutu Fund	ontinue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
Hummingbird Circle rust	0/31/2 25	$1,000 $1 ,000	INVESCO QQQ TR SER QQQ					ETF	ransaction occurred as an automatic reinvestment of dividends received into passive ETFs mutual unds after transitioning out o single stocks, per best practices.
Hummingbird Circle rust	1 /4/2025	$50,001 $100,000	SELECT SECTOR SPD TR TECHNOLOGY XLK					ETF	continue best practices, these transactions reflect purchases or sales of passive ET or mutual unds.
Hummingbir Circle rust	/4/2025	$50,00 $100,000	JPMORGAN ULTRA SHORT MUNICI AL FU CLASS USMTX			es	Yes	Mutual Fund	continue best practices, hese transactions reflect purchases or sales of passive ETFs or mutual unds.
ummingbird Circle rust	1 /4/2025	$1,000 $15,000	PMORGAN TRA SHOR MU IPAL FU CLASS USMTX			es	es	Mutual Fund	continue best practices, these transactions reflect purchases or sales of passive ETFs mutual unds.
ummingbird Circle rust	/26/2 25	$100,00 $250,000	AN ARD EX FDS S&P 500 ETF SHS EW VOO					ETF	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutual unds.
ummingbir Circle rust	1 /26/2025	*$100,00 $250,000*	*ISHARES TR EXPANDED TECH-SOFTWARE SECTOR ETF IGV*			Yes	*No*	ET	ntinue best practices, these transactions reflect purchases or sales passive ETFs mutual unds.
Hummingbird Circle rust	2/9/202	$15,001 $50,000	INVESCO EXCHANGE-TRADED FD TR S&P 500 QUAL WEIGHT ETF RSP					ETF	continue best practices, these transactions reflect purchases or sales passive ETFs or mutua unds.
Hummingbird Circle rust	2/9/202	$15,00 $50,000	SELECT SECTOR SPD TR STATE STREET INDUSELECT SECT SPDR ETF XLI					ETF	continue bes practices, hese ansactions reflect purchases or sales f passive ETFs or mutua unds.
ummingbird Circle rust	12/9/2025	$15,00 $50,000	INVESCO EXCHANGE-TRADED FD TR S&P 500 QUALITY ETF SPH					ETF	continue best practices, these transactions reflect purchases sales of passive ETFs or mutual funds.
ummingbird Circle Trust	2/9/2025	$1,000 $15,000	SELECT SECTOR SPD TR STATE STREET LSELECT SECT SPDR ETF XLF					ETF	continue best practices, these ansactions reflect purchases or sales of passive ETFs mutua funds.
ummingbird Circle rust	2/9/2025	$15,001 $50,000	ANGUARD SPECIALIZED FU DS DIVI APPRECIATION ETF SHS					ET	continue best practices, these nsactions reflect purchases or sales passive ET or mutual unds.
Hummingbird Circle rust	12/9/2025	$15,001 $50,000	ISHARES TR RUSSELL 1000 ALUE ETF IW					ET	continue bes practices, thes transactio refle purchases or sales of passive ET or mutua unds.
Hummingbird Circle Trust	2/9/2025	$1,000 $15,000	WGM FOCUSED NTERNATIONAL GROWTH FUN INSTITUTI AL CLAS W					Mutua Fund	nsaction occurred as an utomatic reinvestment of dividends received into passive ETFs or mutual funds after transitioning ut single oc per best practices.
ummingbird Icle rust	2/9/2025	$50,00 $100,000	PM RGAN ULTRA SHORT MUN PAL FU CLASS USMTX			es	es	Mutual Fund	continue best practices, these transactions reflect purchases or sales of passive ETFs or mutua unds.
ummingbird Circle rust	2/18/202	$ 00,001 $250,000	MERICAN GROWTH FU OF AMERICA CLASS F3 GAFFX					Mutual Fund	nsaction occurred as automatic reinvestment of dividends received into passive ETFs or mutual unds after transitioning out of hole stocks, per best practices.
ummingbir Circle Trust	12/26/2025	$1,000 $15,000	SELECT SECTOR SPD TR ST TE STREET TECHNOLOGY SELECT SECTO SPDR ETF XLK					ETF	ransaction occurred as automatic reinvestment dividends received into ossive ETFs mutual funds after transitio ne ut of hole stocks, per best practices.
Hummingbird Circle Trust	2/26/2025	$1,000 15,000	NVESCO EXCHANGE-TRADED FD TR S&P 500 QUAL WEIGHT ETF RSP					ETF	T nsaction ccurre as utomatic reinvestment of dividends received into passive ETF or mutual unds fter tra nine ut of single cks, pe best practices.

Sub Holding of	Date	Amount of Transaction	Asset Type	Type of transaction	Recurring	Capital Gains Exceeded $200?	Partial transaction?	Asset Class	Note	Comment
George Whitesides Individual	3/13/2025	$1,000 $15,000	AMERICAN WASHINGTON MUTUAL INVESTORS FUND CLASS WSHX					Mutual Fund	Share class conversion WSHX to FWMIX on 3/24/25. FWMIX transferred unhold nest on /21/25.	transaction occurred an automatic reinvestment of dividends received into passive ETFs or mutual funds after transitioning out of sing stocks, per best practices.
George Whitesides Individual	3/24/2025	$15,001 $50,000	VANGUARD TARGET RETIREMENT 2045 FUND- VTIVX			Yes	No	Mutual Fund		continue best practices, these transactions reflect purchases or sales of passive ETFs mutual funds.
George Whitesides Individual	3/24/2025	$100,001 $250,000	ISHARES TR BIOTECHNOLOGY ETF IBB			Yes	No	ETF		continue best practices, these transactions flect purchases or sales of passive ETFs or mutual funds.
George Whitesides Individual	3/24/2025	$500,001 $1,000,000	FRANKLI RISING DIVIDENDS FUND CLASS FRDPX			Yes	No	Mutual und		contiou best practices, these transactions reflect purchases sales passive ETFs mutual funds.
George Whitesides Individual	3/24/2025	$15,001 $50,000	BANK AMER CORP COM BAC			Yes	No	Stock		To avoid any possibl conflicts of interest with my future Congressional work, transitioned my ngl stock, company-specific holdings into pas ve ETFs an mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$250,001 $500,000	MICROSOFT CORP COM MSFT			Yes	No	Stock		avoid any possible conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs an mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$15,001 $50,000	VISA IN COM CL			es	No	Stock		To avoi any possibl conflicts of interest with my future Congressional work, transitioned my gle stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$100,001 $250,000	COCA COLA CO COM KO			Yes	No	Stock		To avoid any possible conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$15,001 $50,000	INTEL CORP COM INTC			No	No	Stock		To avoi any possibl conflicts of interest with my future Con essional work, transitioned my ngle stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$1,000- $15,000	SANOFI GROUP AG SPONSORED ADS ISIN:US7960R20108 SNY			Yes	No	Stock		avoid any possible conflicts of interest wi futur Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$50,001 $100,000	LOCKHEED MARTIN CORP COM- LMT			Yes	No	Stock		To avoi any possi con cts of interest with my futur Congressional work, transitione my ng stock, company-specific holdings into passive ETFs and mutual funds, per be practices.
George Whitesides Individual	3/24/2025	$50,001 $100,000	COMCAST CORP NEW CL CMCSA			Yes	No	Stock		To avoi any possibl conflicts of interest wi my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per est practices.
George Whitesides Individual	3/24/2025	$15,001 $50,000	DISNEY WALT CO DISNEY COM DIS			No	No	Stock		To avoi any possibl conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$50,001 $100,000	JPMORGAN CHASE CO COM JPM			Yes	No	Stock		To avoid any possibl conflicts of interest with my future Congressional work, transitioned my sing stock, company-speci holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$50,001 $100,000	UNION PAC CORP COM UNP			Yes	No	Stock		To avoid any possibl conflicts of interest with my future Congressional work, transitioned my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$50,001 $100,000	ROCKWELL AUTOMATION INC COM ROK			Yes	No	Stock		avoid any possibl conflicts of interest wi my future Congressional work, anitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, best practices.
George Whitesides Individual	3/24/2025	$100,001 $250,000	LINDE PLC NEW SHS ISIN IE00BZ12WT62 LIN			Yes	No	Stock		avoid any possibl conflicts of rest wi my future Congressional work, transitioned my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$1,000 $15,000	VIRGIN GALACTIC HLDGS INC COM NEW SPCE			No	No	Stock		To avoi any possible conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual unds, per best practices.
George Whitesides Individual	3/24/2025	$15,001 $50,000	AMERICAN ELE PW'R CO INC COM AEP			Yes	No	Stock		To avoi any possible conflicts of interest with my futur Congressional work, transitioned my ngl stock, company-specific hol ngs assive ETFs and mutual unds, per bes practices.
George Whitesides Individual	3/24/2025	$100,001 $250,000	CHUBB LTD COM ISIN:CH0044328745 CB			Yes	No	Stock		To avoi any possible conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, best practices.
George Whitesides Individual	3/24/2025	$100,001 $250,000	MCDONALDS CORP COM MCD			Yes	No	Stock		To avoid any possible conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs an mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$50,001 $100,000	RTX CORP COM RTX			Yes	No	Stock		avoi any possible conflicts of interest wi my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$15,001 $50,000	DIAGEO PLC SPONSORED ADR NEW ISIN:US25243Q2057 DE			No	No	Stock		To avoid any possible conflicts Interes my future Con essional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$100,001 $250,000	HOME DEPOT COM HD			es	No	Stock		To avo any possibl conflicts of interest with my future Congressional work, transition my sing stock, company-specific holdings into passive ETFs, and mutual unds, per best practices.
George Whitesides Individual	3/24/2025	$50,001 $100,000	INNOVIV INC COM INV			Yes	No	Stock		avoi any possible conflicts of interest th my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$15,001 $50,000	THERA ANCE BIOPHARMA CO INDEX/SEC/TICKER TBPH			No	No	Stock		To avoi any possi conflicts of interest with my future Congressional work, transitioned my sing stock, company-specif sings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$50,001 $100,000	TEXAS NSTRS COM TXN			Yes	No	Stock		To avoi any possible conflicts of interest wi my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$100,001 $250,000	REPUBLI SVCS IN COM RSG			Yes	No	Stock		To avoi any possibl conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds. best practices.

George Whitesides Individual	3/24/2025	$15,001 $50,000	CITIGROUP IN COM NEW			Yes	No	Stock		avoid any possibl conflicts interest with my future Congressional wor transitione my sing stock, company-specif holdings into passive ETFs and mutual funds, best practices.
George Whitesides Individual	3/24/2025	$100,001 $250,000	MARSH MCLENNA COS COM-MMC			es	No	Stock		avoi any possibl conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual unds, best practices.
George Whiteside Individual	3/24/2025	$100,001 $250,000	PROCTER GAMBLE CO COM PG			es	No	Stock		To avoi any possible conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, best practices.
George Whitesides Individual	3/24/2025	$100,001 $250,000	JOHNSON & JOHNSON COM JNJ			Yes	No	Stock		To avoi any possible conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$50,001 $100,000	MEDTRONIC PLC SHS ISIN#IE00BTN1Y115 MDT			Yes	No	Stock		avoi any possi conflicts of interest wi my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$100,001 $250,000	ROYA CARIBBEAN GROUP ISIN#LR0008862868 RCL			Yes	No	Stock		avoid any possi conflicts of interest wi my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, best practices.
George Whitesides Individual	3/24/2025	$50,001 $100,000	EXTERA ENERGY COM EE			es	No	Stock		To avoi any possible conflicts of interest with my future Congressional work, transitioned my sing stock, company-specific holdings into passive ETFs and mutual funds, per best actices.
George Whiteside Individual	3/24/2025	$100,001 $250,000	NOVARTIS AG SPONSORED ADR NVS			es	No	Stock		To avoi any possibl conflicts of terest with my future Congressional work, transitioned my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices.
George Whitesides Individual	3/24/2025	$100,001 $250,000	ISHARES TR EXPANDED TECH-SOFTWARE SECTOR ETF IGV					ETF	Asset Moved to ue rust on 7/21/25.	To continue best practices, these transactions effect purchases or sales of passive ETFs or mutual nds.
George Whitesides Individual	3/24/2025	$100,001 $250,000	ISHARES TR RUSSELL 3000 ALUE ETF IWD					ETF	Asset Moved uebi rust on 7/21/25.	To continue best practices, these transactions fect purchases sales of passive ETFs mutual funds.
George Whitesides du	3/24/2025	$50,001 $100,000	SELECT SECTOR SPDR TR INANCIAL XLF					ETF	Asset Moved to Bluebird Trust on 7/21/25.	To continue best practices, these transactions fect purchases or sales of passive ETF rutual unds.
George Whitesides Individual	3/24/2025	$1,000,001 $5,000,000	INVESCO QQQ TR UN SER QQQ					ETF	Asset Moved to uebird rust on /21/25.	To continue best practices, the transactions fect urchases sales passive ETFs mutual funds.
George Whitesides Individual	3/24/2025	$250,001 $500,000	INVESCO EXCHANGE-TRADED FD TR S&P 500 EQUAL WEIGHT ETF RSP					ETF	Asset Moved Bluebird rust on 7/21/25.	To continue best practices, these transactions reflect purchases sales of passive ETFs or mutual unds.
George Whi sides Individual	/24/2025	$100,001 $250,000	ISHARES TR CORE S&P MID-CAP ETF IJH					ETF	Asset Moved uebird rust on 7/21/25.	To continue best practices, these transactions reflect purchases or sales of passive ETFs rutual funds.
George Whitesides Individual	3/24/2025	$100,001 $250,000	ACER FDS TR US CASHCOWS 100 ETF COWZ					ETF	Asset Moved to Bluebird rust on 7/21/25.	To continue best practices, these transactions fect purchases or sales of passive ETFs rutual funds.
George Whitesides Individual	3/24/2025	$500,001 $1,000,000	ISHARES TR MSCI USA QUALITY FACTOR ETF QUAL					ETF	Asset Move uebird Trust on /21/25.	To con nue he practi es, the transactions fect urchases sales of passive ETF mutual funds.
George Whitesides Individual	3/24/2025	$100,001 $250,000	ANEOK ETF TR SEMICONDUCTOR ETF SMH					ETF	Asset Move to Bluebird Trust Hummingbird Ord Trust on /21/25.	To continue best practices, these transactions reflect purchases sales of passive ETFs mutual funds.
George Whitesides Individual	3/24/2025	$100,001 $250,000	LECT SECTOR SPDR TR TECHNOLOGY XLK					ETF	Asset Moved uebird rust on 7/21/25.	To continue best practices, these transactions fect purchases sales passive ETFs mutual funds.
George Whitesides Individual	3/24/2025	$50,001 $100,000	ISHARES TR CORE S&P SMALL-CAP ETF IJR					ETF	Asset Moved to Blue Trust on 7/21/25.	To continue best practices, these transactions reflect purchases sales of passive ETFs mutual funds.
George Whitesides Individual	3/24/2025	$250,001 $500,000	MFS INTERNA DNAL GROWTH FUND CLASS MIOGIX					Mutual und	Asset Moved uebird Trust Hummingbird Circle Trust on 7/21/25.	continue best practices, these transactions reflect purchases sal of passive ETFs or mutual funds.
George Whitesides Individual	4/28/2025	$100,001 $250,000	PACER FDS TR US CASHCOWS CO ETF COWZ			No	No	ETF		To continue best actices, these transactions reflect purchases s...es of passive ETFs or mutual funds.
George Whitesides Individual	4/28/2025	$50,001 $100,000	ISHARES TR CORE S&P SMALL-CA ETF			No	No	ETF		continue best practices, these transactions reflect purchases sales of passive ETFs mutual funds.
George Whitesides Individual	4/28/2025	$50,001 $100,000	MFS INTERNATIONAL GROWTH FUN CLASS MIOGIX					Mutual Fund	Asset Moved to uebird rust Hummingbird Ord Trust on /21/25.	continue best practices, these transactions fect purchases or sales passive ETFs mutual funds.
George Whitesides Individual	4/28/2025	$50,001 $100,000	SPDR SER TR S&P 500 HIG DIVI ETF SPYD					ETF	Asset Move to uebird rus on 7/21/25.	To continu best practices, these transactions ect purchases or sales of passive ETFs or mutual unds.
George Whitesides Individual	/28/2025	$50,001 $100,000	INVESCO EXCHANGE-TRADED FD TR S& 500 EQUAL WEIGHT ETF RSP					ETF	Asse Moved Bluebird rust on 7/21/25.	To continue best practices, these transactions reflect purchases sales of passive ETFs or mutual funds.
George Whitesides Individual	4/28/2025	$15,001 $50,000	SELECT SECTOR SPDR TR FINANCIAL - XLF					ETF	Asset Moved uebird rust on 7/21/25.	To continue best practices, these transactions reflect purchases sales of passive ETFs or mutual funds.
George Whitesides Individual	4/29/2025	$1,000,001 $5,000,000	JPMORGAN ULTRA SHORT MUNICIPAL FUND CLASS USMIX					Mutual Fund	Asse Moved to Bluebird rust on 7/21/25.	contin best practices, these transactions effect purchases sal of passive ETFs or mutual funds.
George Whitesides Individual	6/12/2025	$50,00 100,000	AMERICAN WASHINGTON MUTUAL INVESTORS FUN CLASS FWMX					Mutual Fund	Share ass Conversion WSHX to FWMX, Asset Moved ebi Trust on /21/25.	Transaction occurred as an automati reinvestment dividends received into passive ETFs or mutual funds after transi oning out of sing stocks, est practices.
George Whitesides ual	6/20/2025	$1,000 $15,000	ISHARES TR MSCI USA QUALITY FACTOR ETF QUAL					ETF	Asse Move to uebird rust on 7/21/25.	Transaction occurred as an automati reinvestment idends received into passive ETFs or mutual funds aft transitioning out single stocks, per best practices.
George Whitesides vidual	6/20/2025	$1,000 $15,000	ISHARES TR RUSSELL 3000 ALUE ETF IWD					ETF	Asset Moved to uebird rust on 7/21/25.	transaction occurred an automatic reinvestment of dividends received into passive ETFs or mutual funds after transitioning out of single stocks, per est practices.
George Whitesides Individual	6/25/2025	$1,000- $15,000	SPDR SER TR S& 500 HIGH DIVID ETF SPYD					ETF	Ass Moved to uebi rust on 1/25.	transaction occurre an automatic reinvestment idends received into passive ETF or mutual nds after transitioning out of single stocks, est practices.
George Whitesides Individual	6/27/2025	$1,000 $15,000	INVESCO EXCHANGE-TRADED TR S&P 500 QUAL WEIGHT ETF RSP					ETF	Asset Moved uebi Trust on 7/21/25.	Transaction occurred an automatic reinvestment of idends received into passive ETFs or mutual funds after transitioning out ngl stocks, best practices.
George Whitesides Individual	7/3/2025	$50,001 $100,000	SPDR SER TR S&P 500 HIGH DIVID ETF SPYD			es	No	ETF		To continue best practices, these transactions reflect purchases or sales of passive ETFs mutual funds.
George Whitesides Individual	/3/2025	$50,001 $100,000	SELECT SECTOR SPDR TR TECHNOLOGY XLK					ETF	Asse Moved uebird rust on 7/21/25.	To continue bes practices, these transactions fect purchases or sales of passive ETFs mutual funds.