



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Bale Dalton
Status: Congressional Candidate
State/District: FL07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2026
Filing Date: 05/15/2026
Period Covered: 01/01/2025– 04/15/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Checking Account - AmEx Business [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	None
Checking Account - USAA [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Passive Shareholder - Lake Eden Preserve LLC [OL]		\$15,001 - \$50,000	Cash Distribution	\$1,001 - \$2,500	\$1,001 - \$2,500
LOCATION: Black Mountain, NC, US DESCRIPTION: Passive shareholder stake in Lake Eden Preserve LLC					
Passive Shareholder - Quickserv Cocktails, LLC [OL]		\$15,001 - \$50,000	Cash Distribution	None	None
LOCATION: Los Angeles, CA, US DESCRIPTION: Passive shareholder stake in Quickserv Cocktails, LLC					
Savings Bond - Series I (2022) [GS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Savings Bond - Series I (2023) [GS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Evolve Individual (TODI) ⇒ ADT Inc. Common Stock (ADT) [ST]		\$1,001 - \$15,000	Capital Gains	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve Individual (TODI) ⇒ AECOM Common Stock (ACM) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Alnylam Pharmaceuticals, Inc. - Common Stock (ALNY) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	None
Evolve Individual (TODI) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Evolve Individual (TODI) ⇒ Ameriprise Financial, Inc. Common Stock (AMP) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ Autodesk, Inc. - Common Stock (ADSK) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Capital One Financial Corporation Common Stock (COF) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ Cencora, Inc. Common Stock (COR) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Evolve Individual (TODI) ⇒ Charles Schwab Corporation (SCHW) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Evolve Individual (TODI) ⇒ Cheniere Energy, Inc. Common Stock (LNG) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Chewy, Inc. Class A Common Stock (CHWY) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Evolve Individual (TODI) ⇒ Dollar General Corporation Common Stock (DG) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve Individual (TODI) ⇒ Intuit Inc. - Common Stock (INTU) [ST]		\$1 - \$1,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ ITT Inc. Common Stock (ITT) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Janus Henderson Group plc Ordinary Shares (JHG) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ Janus Henderson Group plc Ordinary Shares (JHG) [ST]		None	Capital Gains	\$201 - \$1,000	None
Evolve Individual (TODI) ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Evolve Individual (TODI) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$201 - \$1,000
Evolve Individual (TODI) ⇒ JPMorgan Hedged Equity Laddered Overlay ETF (HELO) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Evolve Individual (TODI) ⇒ Las Vegas Sands Corp. Common Stock (LVS) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Mattel, Inc. - Common Stock (MAT) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ Micron Technology, Inc. - Common Stock (MU) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Evolve Individual (TODI) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ MMKT - Fidelity GOVT (FZBXX) [IH]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve Individual (TODI) ⇒ MMKT - Vanguard Cash Reserve (VMRXX) [IH]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Evolve Individual (TODI) ⇒ Morgan Stanley Common Stock (MS) [ST]		\$1,001 - \$15,000	None		
Evolve Individual (TODI) ⇒ Motorola Solutions, Inc. Common Stock (MSI) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ MSCI Inc. Common Stock (MSCI) [ST]		\$1 - \$1,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ NRG Energy, Inc. Common Stock (NRG) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None
Evolve Individual (TODI) ⇒ Oracle Corporation Common Stock (ORCL) [ST]		\$1 - \$1,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ Paylocity Holding Corporation - Common Stock (PCTY) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Pegasystems Inc. - Common Stock (PEGA) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ Philip Morris International Inc Common Stock (PM) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ Qorvo, Inc. - Common Stock (QRVO) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ QUALCOMM Incorporated - Common Stock (QCOM) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Scilex Holding Company - Warrant (SCLXW) [ST]		None	None		
Evolve Individual (TODI) ⇒ Tenet Healthcare Corporation Common Stock (THC) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve Individual (TODI) ⇒ The Cigna Group Common Stock (CI) [ST]		\$1 - \$1,000	Capital Gains	None	None
Evolve Individual (TODI) ⇒ Twilio Inc. Class A Common Stock (TWLO) [ST]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	None
Evolve Individual (TODI) ⇒ Zebra Technologies Corporation - Class A Common Stock (ZBRA) [ST]		\$1 - \$1,000	Capital Gains	None	None
Evolve IRA (Roth) ⇒ A.P MOLLER-MRS UNS/ADR (AMKBY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ AAON, Inc. - Common Stock (AAON) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ AbbVie Inc. Common Stock (ABBV) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Abercrombie & Fitch Company Common Stock (ANF) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ ADT Inc. Common Stock (ADT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ ADVANTEST CORP SP/ADR (ATEYY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ AECOM Common Stock (ACM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Affiliated Managers Group, Inc. Common Stock (AMG) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Airbnb, Inc. - Class A Common Stock (ABNB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ AJINOMOTO CO UNSP/ADR (AJINY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ ALIBABA GROUP HOLDING LTD (BABA) [ST]		None	Capital Gains	\$1 - \$200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ Alnylam Pharmaceuticals, Inc. - Common Stock (ALNY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Ameriprise Financial, Inc. Common Stock (AMP) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ AppFolio, Inc. - Class A Common Stock (APPF) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Applied Industrial Technologies, Inc. Common Stock (AIT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ ASE Technology Holding Co., Ltd. American Depositary Shares (ASX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ ASE Technology Holding Co., Ltd. American Depositary Shares (ASX) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ ASTELLAS PHARMA UNSP/ADR (ALPMY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Autodesk, Inc. - Common Stock (ADSK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ AXA S/ADR (AXAHY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ B3 SA BRASIL UNSP/ADR (BOLSY) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Banco Bradesco Sa American Depositary Shares (BBDO) [ST]					
Evolve IRA (Roth) ⇒ BANK IRELAND GRP UNSP/ADR (BKRIY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ BANK OF CHINA UNSP/ADR (BACHY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Barrick Mining Corporation Common Shares (B) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Bausch Health Companies Inc. Common Stock (BHC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ BJ's Wholesale Club Holdings, Inc. Common Stock (BJ) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ BNP PARIBAS SPONS ADR (BNPQY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ BorgWarner Inc. Common Stock (BWA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ BOUYGUES SA UNSP/ADR (BOUY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ BP p.l.c. Common Stock (BP) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Bristol-Myers Squibb Company Common Stock (BMY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ CAIXABANK SA UNSP/ADR (CAIXY) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ CANON INC S/ADR (CAJPY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CANON INC S/ADR (CAJPY) [ST]					
Evolve IRA (Roth) ⇒ Capital One Financial Corporation Common Stock (COF) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Carlisle Companies Incorporated Common Stock (CSL) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Caterpillar, Inc. Common Stock (CAT) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Celestica, Inc. Common Stock (CLS) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Cemex, S.A.B. de C.V. Sponsored ADR (CX) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ Cencora, Inc. Common Stock (COR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Centerra Gold Inc. Common Shares (CGAU) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ CF Industries Holdings, Inc. Common Stock (CF) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Charles Schwab Corporation (SCHW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Chemed Corp (CHE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Cheniere Energy, Inc. Common Stock (LNG) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Chewy, Inc. Class A Common Stock (CHWY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ CHINA CONSTR BK UNSP/ADR (CICHY) [ST]		None	Capital Gains	\$1 - \$200	None
Evolve IRA (Roth) ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
China Yuchai International Limited Common Stock (CYD) [ST]					
Evolve IRA (Roth) ⇒ ChipMOS TECHNOLOGIES INC. - American Depositary Shares (IMOS) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ CK HUTCH HLD LTD UNSP/ADR (CKHUY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Coca-Cola Consolidated, Inc. - Common Stock (COKE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Comfort Systems USA, Inc. Common Stock (FIX) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Commvault Systems, Inc. - Common Stock (CVLT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Computershare Ltd Sponsored ADR (CMSQY) [ST]		None	None		
Evolve IRA (Roth) ⇒ ConocoPhillips Common Stock (COP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Corpay, Inc. Common Stock (CPAY) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Crocs, Inc. - Common Stock (CROX) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Deere & Company Common Stock (DE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Dell Technologies Inc. Class C Common Stock (DELL) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ DENSO CORP UNSP/ADR (DNZOY) [ST]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ Deutsche Post Ag Ordinary Shares (DPSTF) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ DEUTSCHE POST AG S/ADR (DHLGY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Devon Energy Corporation Common Stock (DVN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ DNB ASA SP/ADR (DNBBY) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Dollar General Corporation Common Stock (DG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Dollar Tree, Inc. - Common Stock (DLTR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ eBay Inc. - Common Stock (EBAY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Embotelladora Andina S.A. Common Stock (AKO.B) [ST]		None	Capital Gains	\$1 - \$200	None
Evolve IRA (Roth) ⇒ EMCOR Group, Inc. Common Stock (EME) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Enerflex Ltd Common Shares (EFXT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ ENI S.p.A. Common Stock (E) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ Equinor ASA (EQNR) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Equitable Holdings, Inc. Common Stock (EQH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ ESAB Corporation Common Stock (ESAB) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Expedia Group, Inc. - Common Stock (EXPE) [ST]					
Evolve IRA (Roth) ⇒ FedEx Corporation Common Stock (FDX) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ FinVolution Group American Depositary Shares (FINV) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ First Industrial Realty Trust, Inc. Common Stock (FR) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ FORTESCUE METAL GRP S/ADR (FSUGY) [ST]		None	Capital Gains	\$201 - \$1,000	None
Evolve IRA (Roth) ⇒ Fortuna Mining Corp. Common Shares (FSM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Fox Corporation - Class A Common Stock (FOXA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Fresenius Medical Care AG American Depositary Shares (FMS) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Fresenius Medical Care AG American Depositary Shares (FMS) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ GEELY AUTOMOBILE HLD S/ADR (GELHY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Gilead Sciences, Inc. - Common Stock (GILD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Grupo Aeroportuario del Centro Norte S.A.B. de C.V. - American Depositary Shares each representing 8 (OMAB) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ GRUPO FINC BANORTE S/ADR (GBOOY) [ST]		None	Capital Gains	\$1 - \$200	None
Evolve IRA (Roth) ⇒ Halliburton Company Common Stock (HAL) [ST]		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ HF Sinclair Corporation Common Stock (DINO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Honda Motor Company, Ltd. Common Stock (HMC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ HSBC Holdings, plc. Common Stock (HSBC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ HSBC Holdings, plc. Common Stock (HSBC) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ Hudbay Minerals Inc. Ordinary Shares (HBM) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ HUSQVARNA AB A SHS (HUQVF) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ ICL Group Ltd. Ordinary Shares (ICL) [ST]		None	None		
Evolve IRA (Roth) ⇒ IHS Holding Limited Ordinary Shares (IHS) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ IMPERIAL BRANDS PLC ADR (IMBBY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ INDRA SISTEMAS UNSP/ADR (ISMAY) [ST]		None	Capital Gains	\$1 - \$200	None
Evolve IRA (Roth) ⇒ InMode Ltd. - Ordinary Shares (INMD) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Interactive Brokers Group, Inc. - Class A Common Stock (IBKR) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ INTESA SANPAOLO S/ADR (ISNPY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Intuit Inc. - Common Stock (INTU) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ IPG Photonics Corporation - Common Stock (IPGP) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ ITT Inc. Common Stock (ITT) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Janus Henderson Group plc Ordinary Shares (JHG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Jardine Matheson Holdings Ltd Unsponsored ADR (JMHL) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ JD.com, Inc. - American Depositary Shares (JD) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Keysight Technologies Inc. Common Stock (KEYS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Kimberly-Clark Corporation Common Stock (KMB) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Kinross Gold Corporation Common Stock (KGC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Kinsale Capital Group, Inc. Common Stock (KNSL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ KONINKLIJKE AD N.V. S/ADR (ADRNY) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Kyndryl Holdings, Inc. Common Stock (KD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Las Vegas Sands Corp. Common Stock (LVS) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ LEGAL&GENL GRP PLC S/ADR (LGGNY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ LENOVO GROUP LTD S/ADR (LNVGY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ LexinFintech Holdings Ltd. - American Depository Shares (LX) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ LG Display Co, Ltd AMERICAN DEPOSITORY SHARES (LPL) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ LI NING CO LTD UNSP/ADR (LNNGY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Live Nation Entertainment, Inc. Common Stock (LYV) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Lloyds Banking Group Plc American Depository Shares (LYG) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Logitech International S.A. - Registered Shares (LOGI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ LY CORP UNS/ADR (YAHGY) [ST]		None	None		
Evolve IRA (Roth) ⇒ Magna International, Inc. Common Stock (MGA) [ST]		None	Capital Gains	\$201 - \$1,000	None
Evolve IRA (Roth) ⇒ Manhattan Associates, Inc. - Common Stock (MANH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ MARKS & SPENCER GRP S/ADR (MAKSY) [ST]		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ MARUBENI CORP ORD (MARUF) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ MATRIX IT LTD (RMTHF) [ST]		None	None		
Evolve IRA (Roth) ⇒ Mattel, Inc. - Common Stock (MAT) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ MERCEDES-BENZ UNSP / ADR (MBGY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Micron Technology, Inc. - Common Stock (MU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ MITSUBISHI CORP UNSP ADR (MTSUY) [ST]		None	Capital Gains	\$201 - \$1,000	None
Evolve IRA (Roth) ⇒ Morgan Stanley Common Stock (MS) [ST]		\$1,001 - \$15,000	None		
Evolve IRA (Roth) ⇒ Motorola Solutions, Inc. Common Stock (MSI) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ MS&AD INS GRP HL UNSP/ADR (MSADY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ MSCI Inc. Common Stock (MSCI) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Mueller Industries, Inc. Common Stock (MLI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Naspers Limited N Shs Sponsored American Depositary Receipt Representing Class N Shares (NPSNY) [ST]					
Evolve IRA (Roth) ⇒ NASPERS LTD S/ADR (NPSNY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ NatWest Group plc American Depositary Shares, (NWG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ NetApp, Inc. - Common Stock (NTAP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ New York Times Company (NYT) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ NewJersey Resources Corporation Common Stock (NJR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ NewMarket Corp Common Stock (NEU) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ NIPPON YUSEN KBSHKI S/ADR (NPNYY) [ST]		None	Capital Gains	\$1 - \$200	None
Evolve IRA (Roth) ⇒ NOVONESIS B UNSP/ADR (NVZMY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ NRG Energy, Inc. Common Stock (NRG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ ONO PHARMACEUTICAL (OPHLF) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ Oracle Corporation Common Stock (ORCL) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Paylocity Holding Corporation - Common Stock (PCTY) [ST]		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ PayPal Holdings, Inc. - Common Stock (PYPL) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Pegasystems Inc. - Common Stock (PEGA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Petroleo Brasileiro S.A. Petrobras ADS (PBR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Philip Morris International Inc Common Stock (PM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ PICC PPTY&CSLT UNSP/ADR H (PPCCY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Pilgrim's Pride Corporation - Common Stock (PPC) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ PING AN INS CO OF CHINA (PNGAY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ PROSUS NV SP/ADR (PROSY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ PT ASTRA INTL IDR U/ADR (PTAIY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Qorvo, Inc. - Common Stock (QRVO) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ QUALCOMM Incorporated - Common Stock (QCOM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Ralph Lauren Corporation Common Stock (RL) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Rayonier Inc. REIT Common Stock (RYN) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ RenaissanceRe Holdings Ltd. Common Stock (RNR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Robinhood Markets, Inc. - Class A Common Stock (HOOD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Royal Gold, Inc. - Common Stock (RGLD) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Royalty Pharma plc - Class A Ordinary Shares (RPRX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Ryanair Holdings plc - American Depositary Shares, each representing five Ordinary Shares (RYAAY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ SANDOZ GROUP AG S/ADR (SDZNY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Sandvik A B Sponsored ADR (SDVKY) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ Sanofi - American Depositary Shares (SNY) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ SAP SE ADS (SAP) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ SASOL LTD ORD (SASOF) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ SEIKO EPSON CORP UNSP/ADR (SEKEY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ SENDAS DISTRIBUDRA S/ADR (ASAIY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ SIEMENS ENERGY UNSP/ADR (SMNEY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Simon Property Group, Inc. Common Stock (SPG) [ST]		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ SINOPHARM GRP CO UNSP/ADR (SHTDY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ SK Telecom Co., Ltd. Common Stock (SKM) [ST]		None	Capital Gains	\$1 - \$200	None
Evolve IRA (Roth) ⇒ Smith & Nephew SNATS, Inc. Common Stock (SNN) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ SMITHS GROUP PLC S/ADR (SMGZY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Sony Group Corporation American Depositary Shares (SONY) [ST]		None	None		
Evolve IRA (Roth) ⇒ Sprott Inc. Common Shares (SII) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Sprouts Farmers Market, Inc. - Common Stock (SFM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ STANDARD CHARTERED PLC (SCBFF) [ST]		\$1,001 - \$15,000	None		
Evolve IRA (Roth) ⇒ STANDARD CHRTRD UNSP/ADR (SCBFY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Stantec Inc Common Stock (STN) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ State Street Corporation Common Stock (STT) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ SUMITOMO CORP S/ADR (SSUMY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ SUN HUNG KAI & CO LTD (SHGKF) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ SUN HUNG KAI PY LTD S/ADR (SUHJY) [ST]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ SVENSKA HANDELSBANKEN NEW (SVNLF) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ SVENSKA HANDELSBK UNS/ADR (SVNLY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ SWISS RE LTD ORD (SSREF) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Synchrony Financial Common Stock (SYF) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Talen Energy Corporation (TLN) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Tapestry, Inc. Common Stock (TPR) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ TECHNOPRO HLDGS SP/ADR (TCCPY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Telefonica Brasil S.A. American Depository Shares (VIV) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ TELEPERFORMANCE UNSP/ADR (TLPFY) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Tenet Healthcare Corporation Common Stock (THC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Teradata Corporation Common Stock (TDC) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Teva Pharmaceutical Industries Limited American Depository Shares (TEVA) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ The Cigna Group Common Stock (CI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ The Ensign Group, Inc. - Common Stock (ENSG) [ST]		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ TIM S.A. American Depositary Shares (TIMB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ TopBuild Corp. Common Stock (BLD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Twilio Inc. Class A Common Stock (TWLO) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ TXNM Energy, Inc. Common Stock (TXNM) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ U.S. Bancorp Common Stock (USB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ UNICREDITO SPA UNSP/ADR (UNCRY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Valaris Limited Common Shares (VAL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ VALE S.A. American Depositary Shares Each Representing one common share (VALE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Valvoline Inc. Common Stock (VVV) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Visteon Corporation - Common Stock (VC) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Vodafone Group Plc - American Depositary Shares each representing ten Ordinary Shares (VOD) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Vornado Realty Trust Common Stock (VNO) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Watts Water Technologies, Inc. Class A Common Stock (WTS) [ST]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Evolve IRA (Roth) ⇒ Webster Financial Corporation Common Stock (WBS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Weibo Corporation - American Depositary Shares (WB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ WH GROUP LTD ORD (WHGRF) [ST]		\$1 - \$1,000	None		
Evolve IRA (Roth) ⇒ WH GROUP LTD S/ADR (WHGLY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Wipro Limited Common Stock (WIT) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ X Financial American Depositary Shares, each representing six Class A Ordinary Shares (XYF) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Yum China Holdings, Inc. Common Stock (YUMC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Roth) ⇒ Zebra Technologies Corporation - Class A Common Stock (ZBRA) [ST]		None	Tax-Deferred		
Evolve IRA (Roth) ⇒ Zoom Communications, Inc. - Class A Common Stock (ZM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Traditional) ⇒ ENI S.p.A. Common Stock (E) [ST]		\$1 - \$1,000	Tax-Deferred		
Evolve IRA (Traditional) ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Traditional) ⇒ iShares Large Cap Max Buffer Dec ETF (DMAX) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Evolve IRA (Traditional) ⇒ JPMorgan Hedged Equity Laddered Overlay ETF (HELO) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Evolve IRA (Traditional) ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MMKT - Fidelity GOVT (FZBXX) [IH]					
Evolve IRA (Traditional) ⇒ QXO, Inc. Common Stock (QXO) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Vannevar Labs, Inc	Salary	N/A	\$77,230.08

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Mohela	May 2014	Student Loan (Consolidated)	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Principal	Stella Maris Strategies, LLC
Strategic Advisor	AeroX Ventures
Senior Advisor	SMI

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Evolve IRA (Traditional)
- Evolve Individual (TODI)

- Evolve IRA (Roth)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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

Yes No

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

Yes No

CERTIFICATION AND SIGNATURE

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

Digitally Signed: Bale Dalton , 05/15/2026