



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jotham Stein
Status: Congressional Candidate
State/District: CA16

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2026
Filing Date: 05/01/2026
Period Covered: 01/01/2025– 04/03/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America Bank Account [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Bullion - Gold, Silver, Platinum [PM]		\$100,001 - \$250,000	None		
DESCRIPTION: Gold, Silver & Platinum					
Centivax Inc (Options) [OP]		None	None		
DESCRIPTION: strike price - \$0.15 expiration date - 07/24/2033					
Charles Schwab Bank Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
CIBC Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Ethernovia Inc (Options) [OP]		None	None		
DESCRIPTION: strike price - \$0.83 expiration date - 08/23/2033					
Executive Employment Law paperback published [OT]		Undetermined	Royalties	None	\$1,001 - \$2,500
DESCRIPTION: book					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Law Offices of Jotham S. Stein P.C., 100% Interest [OL] LOCATION: Palo Alto, CA, US DESCRIPTION: Law Offices		\$500,001 - \$1,000,000	None		
Marcus/ Goldman Sachs Bank Account [BA]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
Negotiate Like a CEO audiobook [OT] DESCRIPTION: audiobook		Undetermined	Royalties	\$1 - \$200	\$201 - \$1,000
Negotiate Like a CEO paperback & kindle [OT] DESCRIPTION: paperback & kindle		Undetermined	Royalties	\$1,001 - \$2,500	None
Jotham Stein - Individual xxx1237 ⇒ Fidelity Asset Manager 30% (FTANX) [MF]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Jotham Stein - Individual xxx1237 ⇒ Fidelity Capital and Income Fund (FAGIX) [MF]		None	Capital Gains, Dividends	None	\$1 - \$200
Jotham Stein - Individual xxx1237 ⇒ Fidelity Growth and Income Pt (FGRIX) [MF]		None	Capital Gains	None	\$1 - \$200
Jotham Stein - Individual xxx1237 ⇒ Fidelity Treasury Money Market Fund (FZFXX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$201 - \$1,000
Jotham Stein - Individual xxx1237 ⇒ Janus Henderson Balanced Fund - T Shares (JABAX) [MF]		None	Capital Gains	None	\$1 - \$200
Jotham Stein - Individual xxx1237 ⇒ Meridian Corp CD 4.7% 02/27/26 [BA]		None	Interest	\$1 - \$200	\$1 - \$200
Jotham Stein - Individual xxx1237 ⇒ UBS BK USA NATL ASSN CD 5.10000% 10/13/2026 [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Jotham Stein - Individual xxx1237 ⇒ WELLS FARGO BANK NATL ASSN CD 5.00000% 05/14/2026 [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Jotham Stein - IRA - MassMutual xxx8171 ⇒ MSCI EAFE ETF 1YR Point-to-Point [OT]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: crediting strategy					
Jotham Stein - IRA - MassMutual xxx8171 ⇒ SP500 1YR Point-to-Point [OT]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: SP500 1YR Point-to-Point					
Jotham Stein - IRA BDA xxx9730 ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$1 - \$1,000	Tax-Deferred		
Jotham Stein - IRA BDA xxx9730 ⇒ iShares iBonds Dec 2026 Term Treasury ETF (IBTG) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Jotham Stein - IRA BDA xxx9730 ⇒ iShares iBonds Dec 2027 Term Treasury ETF (IBTH) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Jotham Stein - IRA BDA xxx9730 ⇒ iShares iBonds Dec 2032 Term Treasury ETF (IBTM) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Jotham Stein - IRA BDA xxx9730 ⇒ iShares iBonds Dec 2034 Term Treasury ETF (IBTP) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ Fidelity Extended Market Index Fund (FSMAX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ Fidelity Total International Index Fund (FTIHX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ iShares iBonds Dec 2025 Term Treasury ETF (IBTF) [EF]		None	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ iShares iBonds Dec 2026 Term Treasury ETF (IBTG) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ iShares iBonds Dec 2027 Term Treasury ETF (IBTH) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares iBonds Dec 2028 Term Treasury ETF (IBTI) [EF]					
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ iShares iBonds Dec 2029 Term Treasury ETF (IBTJ) [EF]		None	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ iShares iBonds Dec 2030 Term Treasury ETF (IBTK) [EF]		None	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ iShares iBonds Dec 2031 Term Treasury ETF (IBTL) [EF]		None	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ iShares iBonds Dec 2032 Term Treasury ETF (IBTM) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ iShares iBonds Dec 2033 Term Treasury ETF (IBTO) [EF]		None	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ iShares iBonds Dec 2034 Term Treasury ETF (IBTP) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Jotham Stein - LOJSSPC 401(k) PS xxx7285 ⇒ iShares iBonds Dec 2035 Term Treasury ETF (IBTQ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Jotham Stein - Roth IRA xxx4493 ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Jotham Stein - Roth IRA xxx4493 ⇒ Fidelity Extended Market Index Fund (FSMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Jotham Stein - Roth IRA xxx4493 ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$1 - \$1,000	Tax-Deferred		
Jotham Stein - Roth IRA xxx4493 ⇒ Fidelity Total International Index Fund (FTIHX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
JSS Living Trust ⇒ Agotiate LLC [RP] LOCATION: St Charles, IL, US		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
JSS Living Trust ⇒ Brekixt LLC [RP] LOCATION: Washington, DC, US		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JSS Living Trust ⇒ Centivax Inc [PS] DESCRIPTION: Centivax Inc. Non-Voting Common Stock		\$15,001 - \$50,000	None		
JSS Living Trust ⇒ Ethernovia Inc. [PS] DESCRIPTION: Ethernovia Inc. Preferred Stock		\$15,001 - \$50,000	None		
JSS Living Trust ⇒ Ethernovia Inc. [PS] DESCRIPTION: Ethernovia Inc. Common Stock		\$50,001 - \$100,000	None		
JSS Living Trust ⇒ Half Moon Bay, CA [RP] LOCATION: Half Moon Bay, CA, US		\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
JSS Living Trust ⇒ Lake Shore III [PS] DESCRIPTION: Lake Shore III Common Stock		\$100,001 - \$250,000	Dividends	None	\$1,001 - \$2,500
JSS Living Trust ⇒ JSS Living Trst Brkg - xxx5873 ⇒ Alaska Air Group, Inc. Common Stock (ALK) [ST]		None	Capital Gains	None	None
JSS Living Trust ⇒ JSS Living Trst Brkg - xxx5873 ⇒ Apple Inc. - Common Stock (AAPL) [ST]		None	Capital Gains, Dividends	None	\$2,501 - \$5,000
JSS Living Trust ⇒ JSS Living Trst Brkg - xxx5873 ⇒ Charles Schwab Corporation (SCHW) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000
JSS Living Trust ⇒ JSS Living Trst Brkg - xxx5873 ⇒ Nebius Group N.V. - Class A Ordinary Shares (NBIS) [ST]		None	Capital Gains	None	\$50,001 - \$100,000
JSS Living Trust ⇒ JSS Living Trst Brkg - xxx5873 ⇒ Schwab Government Money Fund - Sweep Shares (SWGXX) [MF]		None	Interest	None	\$1 - \$200
JSS Living Trust ⇒ JSS Living Trst Brkg - xxx5873 ⇒ Schwab U.S. Treasury Money Fund Investor Shares (SNSXX) [MF]		\$100,001 - \$250,000	Capital Gains, Interest	\$201 - \$1,000	\$1,001 - \$2,500
JSS Living Trust ⇒ JSS Living Trst Brkg - xxx5873 ⇒ Southwest Airlines Company Common Stock (LUV) [ST]		None	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JSS Living Trust ⇒ JSS Living Trst Brkg - xxx5873 ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]		None	Capital Gains	None	None
JSS Living Trust ⇒ JSS Living Trst Brkg - xxx5873 ⇒ Vail Resorts, Inc. Common Stock (MTN) [ST]		None	Capital Gains, Dividends	None	\$201 - \$1,000
JSS Living Trust ⇒ JSS Living Trust (cash) xxx6652 ⇒ UNITED STATES TREAS BILLS ZERO CPN 0.00000% 02/07/2025 [GS]		None	Interest	None	\$201 - \$1,000
JSS Living Trust ⇒ JSS Living Trust (cash) xxx6652 ⇒ UNITED STATES TREAS BILLS ZERO CPN 0.00000% 03/12/2026 [GS]		None	Interest	None	\$1,001 - \$2,500
JSS Living Trust ⇒ JSS Living Trust (cash) xxx6652 ⇒ UNITED STATES TREAS BILLS ZERO CPN 0.00000% 06/24/2026 [GS]		None	Interest	None	\$1,001 - \$2,500
JSS Living Trust ⇒ JSS Living Trust (cash) xxx6652 ⇒ UNITED STATES TREAS BILLS ZERO CPN 0.00000% 08/20/2026 [GS]		\$50,001 - \$100,000	None		
JSS Living Trust ⇒ JSS Living Trust (cash) xxx6652 ⇒ UNITED STATES TREAS BILLS ZERO CPN 0.00000% 10/14/2025 [GS]		None	Interest	None	\$1,001 - \$2,500
JSS Living Trust ⇒ JSS Living Trust 2 - xxx1876 ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000
JSS Living Trust ⇒ JSS Living Trust 2 - xxx1876 ⇒ Fidelity Extended Market Index Fund (FSMAX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
JSS Living Trust ⇒ JSS Living Trust 2 - xxx1876 ⇒ Fidelity Total International Index Fund (FTIHX) [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Law Offices of Jotham S. Stein P.C. ⇒ Law Offices of Jotham S. Stein P.C. Corporate Account xxx7646 ⇒ FCASH [BA]		None	Interest	\$1 - \$200	\$1 - \$200
Law Offices of Jotham S. Stein P.C. ⇒ Law Offices of Jotham S. Stein P.C. Corporate Account xxx7646 ⇒ Fidelity Treasury Money Market Fund (FZFXX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Law Offices of Jotham S. Stein P.C. ⇒ Law Offices of		None	Interest	\$1 - \$200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jotham S. Stein P.C. Corporate Account xxx7646 ⇒ UNITED STATES TREAS BILLS ZERO CPN 0.00000% 03/12/2026 [GS]					
Law Offices of Jotham S. Stein P.C. ⇒ Law Offices of Jotham S. Stein P.C. Corporate Account xxx7646 ⇒ UNITED STATES TREAS BILLS ZERO CPN 0.00000% 06/24/2025 [GS]		None	Interest	None	\$201 - \$1,000
Law Offices of Jotham S. Stein P.C. ⇒ Law Offices of Jotham S. Stein P.C. Corporate Account xxx7646 ⇒ UNITED STATES TREAS BILLS ZERO CPN 0.00000% 10/14/2025 [GS]		None	Interest	None	\$1,001 - \$2,500
Law Offices of Jotham S. Stein P.C. ⇒ Law Offices of Jotham S. Stein P.C. Corporate Account xxx7646 ⇒ UNITED STATES TREAS BILLS ZERO CPN 0.00000% 10/19/2025 [GS]		None	Interest	None	\$1 - \$200
LOJSSPC - Cash Balance Plan xxx8669 ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ Fidelity Extended Market Index Fund (FSMAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ Fidelity Total International Index Fund (FTIHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ Fidelity Treasury Money Market Fund (FZFXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS BILLS ZERO CPN 0.00000% 05/08/2025 [GS]		None	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER AB-2028 4.12500% 07/31/2028 NTS NOTE 4.125% Jul-31-2028 [GS]		\$15,001 - \$50,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER AG-2027 3.87500% 11/30/2027 NTS NOTE 3.875% Nov-30-2027 [GS]		\$1,001 - \$15,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER AK-2026 4.00000%		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
02/15/2026 NTS NOTE [GS]					
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER AP-2026 4.12500% 06/15/2026 NTS NOTE 4125% Jun-15-2026 [GS]		\$50,001 - \$100,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER AQ-2025 3.00000% 07/15/2025 NTS NOTE [GS]		None	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER AT-2025 4.25000% 10/15/2025 NTS NOTE [GS]		None	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER AY-2025 4.62500% 02/28/2025 NTS NOTE [GS]		None	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER AZ-2025 3.87500% 03/31/2025 NTS NOTE [GS]		None	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER B-2033 3.50000% 02/15/2033 NTS NOTE 3.500% Feb-15-2033 [GS]		\$50,001 - \$100,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER B-2034 4.00000% 02/15/2034 NTS NOTE 4.000% Feb-15-2034 [GS]		\$15,001 - \$50,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER C-2032 2.87500% 05/15/2032 NTS NOTE 2.875% May-15-2032 [GS]		\$15,001 - \$50,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER E-2032 2.75000% 08/15/2032 NTS NOTE 2.750% Aug-15-2032 [GS]		\$15,001 - \$50,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER E-2034 3.87500% 08/15/2034 NTS NOTE 3.875% Aug-15-2034 [GS]		\$100,001 - \$250,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER F-2032 4.12500% 11/15/2032 NTS NOTE 4.125% Nov-15-2032 [GS]		\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER F-2034 4.25000% 11/15/2034 NTS NOTE 4.250% Nov-15-2034 [GS]		\$50,001 - \$100,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER F-2035 4.00000% 11/15/2035 NTS NOTE 4.000% Nov-15-2035 [GS]		\$50,001 - \$100,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER G-2030 3.50000% 01/31/2030 NTS NOTE3.500% Jan-31-2030 [GS]		\$100,001 - \$250,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER J-2025 2.62500% 03/31/2025 NTS NOTE [GS]		None	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER K-2029 2.87500% 04/30/2029 NTS NOTE 2.875% Apr-30-2029 [GS]		\$50,001 - \$100,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER M-2029 3.25000% 06/30/2029 NTS NOTE3.250% Jun-30-2029 [GS]		\$15,001 - \$50,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER P-2029 3.12500% 08/31/2029 NTS NOTE3.125% Aug-31-2029 [GS]		\$1,001 - \$15,000	Tax-Deferred		
LOJSSPC - Cash Balance Plan xxx8669 ⇒ UNITED STATES TREAS SER Y-2027 2.75000% 04/30/2027 NTS NOTE2.750% Apr-30-2027 [GS]		\$100,001 - \$250,000	Tax-Deferred		
The State Life Insurance Company Asset Care - LTC ⇒ The State Life Insurance Company Asset Care Whole Life [WU]		\$15,001 - \$50,000	None		

* 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
Law Offices of Jotham S. Stein P.C.	Salary and K-1	\$106,126.00	\$652,686.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Hiawatha National Bank	December 2020	Mortgage - Half Moon Bay, CA	\$250,001 - \$500,000
	Claridge House Cooperative	May 2024	Underlying MTG - Washington DC	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Director, President and Employee	Law Offices of Jotham S. Stein P.C.
Manager	Brekixt LLC
Manager	Agotiate LLC
Director	Coastside Hope
COMMENTS: Ended service as a director in 2025	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
2026	Jotham Stein and Law Offices of Jotham S. Stein P.C. 401(k) Profit Sharing Plan & Trust	Mr. Stein is a fully vested participant in the Law Offices of Jotham S. Stein P.C. 401(k) Profit Sharing Plan & Trust. Since he is over 59½, he can take in-service distributions. After employment ends, distributions are generally available as soon as possible and paid in a lump sum, either in cash or as a direct rollover. Final distributions including all employer contributions usually occur in the year after termination.
2026	Jotham Stein and Law Offices of Jotham S. Stein P.C. Pension Plan	Mr. Stein is a fully vested participant in the Jotham Stein and Law Offices of Jotham S. Stein P.C. Pension Plan, a cash balance plan. After employment ends, distributions are generally available as soon as possible and paid in a lump sum, either in cash or as a direct rollover. Final distributions including all employer contributions usually occur in the year after termination.

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

Source (Name and Address)	Brief Description of Duties
Law Offices of Jotham S. Stein P.C. (Palo Alto, CA, US)	Legal Services

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Jotham Stein - IRA BDA xxx9730
- Jotham Stein - LOJSSPC 401(k) PS xxx7285
- Jotham Stein - Roth IRA xxx4493
- Jotham Stein - IRA - MassMutual xxx8171
- LOJSSPC - Cash Balance Plan xxx8669
- JSS Living Trust
- Jotham Stein - Individual xxx1237
- Law Offices of Jotham S. Stein P.C. (100% Interest)
LOCATION: US
- The State Life Insurance Company Asset Care - LTC
- Law Offices of Jotham S. Stein P.C. ⇒ Law Offices of Jotham S. Stein P.C. Corporate Account xxx7646
- JSS Living Trust ⇒ JSS Living Trust (cash) xxx6652 (100% Interest)
- JSS Living Trust ⇒ JSS Living Trust 2 - xxx1876 (100% Interest)
- JSS Living Trust ⇒ JSS Living Trst Brkg - xxx5873 (100% Interest)

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: Jotham Stein , 05/01/2026