



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Ralph A. Alvarado  
**Status:** Congressional Candidate  
**State/District:** KY06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2026  
**Filing Date:** 05/11/2026  
**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
Alvarado Medical Services, LLC, 100% Interest [OL]  LOCATION: KY, KY, US DESCRIPTION: Medical Practice		\$50,001 - \$100,000	Ordinary Business	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
Central Bank - Business AMS [BA]		\$50,001 - \$100,000	None		
Forcht Bank [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Gold [PM]		\$1,001 - \$15,000	None		
Kentucky Legislative Hybrid Cash Balance Plan [PE]		\$15,001 - \$50,000	Tax-Deferred		
Lumeris Group Holding Corporation [PS]  DESCRIPTION: 6091 shares Class A Common Stock, 19563 shares 1-A Preferred Stock. Lumeris is a physician-first healthcare transformation company. Utilizes AI Primary Care models to improve healthcare.		\$1,001 - \$15,000	None		
McClure Road Property [RP]	JT	\$100,001 - \$250,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
LOCATION: Winchester/ Clark, KY, US DESCRIPTION: Undeveloped real estate - zoned agriculture - 12 acres					
Regions Bank [BA]	JT	\$1,001 - \$15,000	None		
Reviva Pharmaceuticals Holdings, Inc. - Common Stock (RVPH) [ST]		\$1 - \$1,000	None		
Silver [PM]		\$50,001 - \$100,000	None		
Stillwater Development Lots [RP]	JT	\$15,001 - \$50,000	None		
LOCATION: Russell Springs/ Rusell, KY, US DESCRIPTION: Two undeveloped real estate lots					
Traditional Bank [BA]	JT	\$1,001 - \$15,000	None		
AMS - Keough ⇒ Aptus Collared Investment Opportunity ETF (ACIO) [EF]		\$15,001 - \$50,000	Tax-Deferred		
AMS - Keough ⇒ Aptus Defined Risk ETF (DRSK) [EF]		\$15,001 - \$50,000	Tax-Deferred		
AMS - Keough ⇒ Aristotle Floating Rate Income Fund Class I (PLFRX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
AMS - Keough ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
AMS - Keough ⇒ Cambria Shareholder Yield ETF (SYLD) [EF]		\$15,001 - \$50,000	Tax-Deferred		
AMS - Keough ⇒ Capital Group Core Plus Income ETF (CGCP) [EF]		\$15,001 - \$50,000	Tax-Deferred		
AMS - Keough ⇒ Goldman Sachs Equity Income Fund Class C (GSGCX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
AMS - Keough ⇒ Harbor Commodity All-Weather Strategy ETF (HGER) [EF]		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
AMS - Keough ⇒ Innovator Equity Managed Floor ETF (SFLR) [EF]		\$15,001 - \$50,000	Tax-Deferred		
AMS - Keough ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
AMS - Keough ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
AMS - Keough ⇒ SPDR Gold Shares (GLD) [EF]		\$1,001 - \$15,000	Tax-Deferred		
AMS - Keough ⇒ State Street SPDR Portfolio S&P 500 ETF (SPYM) [EF]		\$50,001 - \$100,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ Aptus Collared Investment Opportunity ETF (ACIO) [EF]		\$100,001 - \$250,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ Aptus Defined Risk ETF (DRSK) [EF]		\$50,001 - \$100,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ Capital Group Core Plus Income ETF (CGCP) [EF]		\$100,001 - \$250,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ Dimensional International Core Equity Market ETF (DFAI) [EF]		\$50,001 - \$100,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ Goldman Sachs Equity Income Fund Class C (GSGCX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ Harbor Commodity All-Weather Strategy ETF (HGER) [EF]		\$15,001 - \$50,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ Innovator Defined Wealth Shield ETF (BALT) [EF]		\$50,001 - \$100,000	Tax-Deferred		

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AMS Defined Benefit Plan ⇒ Innovator Equity Managed Floor ETF (SFLR) [EF]		\$250,001 - \$500,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ Innovator U.S. Equity Power Buffer ETF - January (PJAN) [EF]		\$50,001 - \$100,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$100,001 - \$250,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ SPDR Gold Shares (GLD) [EF]		\$15,001 - \$50,000	Tax-Deferred		
AMS Defined Benefit Plan ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Health Savings Account 1 ⇒ Cash [BA]	JT	\$1,001 - \$15,000	Tax-Deferred		
Health Savings Account 1 ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Health Savings Account 1 ⇒ Vanguard Index Trust - Growth Index Fund Institutional Shares (VIGIX) [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Health Savings Account 1 ⇒ Vanguard Inflation Protected Securities Fd Insti Shs (VIPIX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Health Savings Account 1 ⇒ Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		
Health Savings Account 1 ⇒ Vanguard Value Index Fd Admiral Shs (VVIAX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Health Savings Account 2 ⇒ Cash [BA]	JT	\$1 - \$1,000	Tax-Deferred		
Health Savings Account 2 ⇒ Vanguard Mid-Cap Value Index Fd Admiral (VMVAX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		

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Health Savings Account 2 ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Health Savings Account 2 ⇒ Vanguard Target Retirement 2050 Fund (VFIFX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		
Managed Account - Pershing ⇒ AbbVie Inc. Common Stock (ABBV) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Managed Account - Pershing ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$50,001 - \$100,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Managed Account - Pershing ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Managed Account - Pershing ⇒ American Express Company Common Stock (AXP) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Managed Account - Pershing ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Capital Gains	\$1 - \$200	\$1 - \$200
Managed Account - Pershing ⇒ Aptus Collared Investment Opportunity ETF (ACIO) [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	None
Managed Account - Pershing ⇒ Aptus Deferred Income ETF (DEFER) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	None
Managed Account - Pershing ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Managed Account - Pershing ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
Managed Account - Pershing ⇒ Blackstone Real Estate Income Trust Inc. [RE]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Managed Account - Pershing ⇒ Canadian Natural Resources Limited Common Stock (CNQ) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	None
Managed Account - Pershing ⇒		\$15,001 - \$50,000	Capital Gains,	\$201 -	\$201 -

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Capital Group Municipal Income ETF (CGMU) [EF]			Dividends	\$1,000	\$1,000
Managed Account - Pershing ⇒ Caterpillar, Inc. Common Stock (CAT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Managed Account - Pershing ⇒ Cintas Corporation - Common Stock (CTAS) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Managed Account - Pershing ⇒ Diamondback Energy, Inc. - Common Stock (FANG) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Managed Account - Pershing ⇒ DiDi Global Inc. American Depository Shares (DIDI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Managed Account - Pershing ⇒ Dimensional National Municipal Bond ETF (DFNM) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Managed Account - Pershing ⇒ EMCOR Group, Inc. Common Stock (EME) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Managed Account - Pershing ⇒ Fastenal Company - Common Stock (FAST) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	None
Managed Account - Pershing ⇒ Garmin Ltd. Common Stock (GRMN) [ST]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Managed Account - Pershing ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Managed Account - Pershing ⇒ Harbor Commodity All-Weather Strategy ETF (HGER) [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Managed Account - Pershing ⇒ iMGP DBi Managed Futures Strategy ETF (DBMF) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	None
Managed Account - Pershing ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Managed Account - Pershing ⇒ iShares Core Dividend Growth ETF (DGRO) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000

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Managed Account - Pershing ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Managed Account - Pershing ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Managed Account - Pershing ⇒ iShares MSCI EAFE ETF (EFA) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Managed Account - Pershing ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Managed Account - Pershing ⇒ KLA Corporation - Common Stock (KLAC) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Managed Account - Pershing ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Managed Account - Pershing ⇒ M&T Bank Corporation Common Stock (MTB) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Managed Account - Pershing ⇒ McKesson Corporation Common Stock (MCK) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1 - \$200
Managed Account - Pershing ⇒ Mettler-Toledo International, Inc. Common Stock (MTD) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Managed Account - Pershing ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Managed Account - Pershing ⇒ Moody's Corporation Common Stock (MCO) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Managed Account - Pershing ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Managed Account - Pershing ⇒ ResMed Inc. Common Stock (RMD) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Managed Account - Pershing ⇒ SPDR Gold Shares (GLD) [EF]		\$50,001 - \$100,000	Capital Gains	\$5,001 - \$15,000	\$5,001 - \$15,000

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Managed Account - Pershing ⇒ State Street Energy Select Sector SPDR ETF (XLE) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Managed Account - Pershing ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Managed Account - Pershing ⇒ United Rentals, Inc. Common Stock (URI) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Managed Account - Pershing ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Managed Account - Pershing ⇒ W.W. Grainger, Inc. Common Stock (GWW) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Managed Account - Pershing ⇒ Wheaton Precious Metals Corp Common Shares (WPM) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
Roth IRA 1 ⇒ Cash [BA]		\$1 - \$1,000	None		
Roth IRA 1 ⇒ Dimensional International Core Equity Market ETF (DFAI) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
Roth IRA 1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Roth IRA 1 ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Roth IRA 1 ⇒ State Street SPDR Portfolio S&P 500 ETF (SPYM) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
Roth IRA 2 - Spouse ⇒ Aptus Collared Investment Opportunity ETF (ACIO) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Roth IRA 2 - Spouse ⇒ Cash [BA]	SP	\$1 - \$1,000	None		
Roth IRA 2 - Spouse ⇒ State Street SPDR Portfolio S&P 500 ETF (SPYM) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000

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Traditional IRA 1 ⇒ Aptus Collared Investment Opportunity ETF (ACIO) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA 1 ⇒ Aptus Defined Risk ETF (DRSK) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA 1 ⇒ Aristotle Floating Rate Income Fund Class I (PLFRX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA 1 ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA 1 ⇒ Cambria Shareholder Yield ETF (SYLD) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA 1 ⇒ Capital Group Core Plus Income ETF (CGCP) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA 1 ⇒ Cash [BA]		\$1,001 - \$15,000	None		
Traditional IRA 1 ⇒ Dimensional International Core Equity Market ETF (DFAI) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA 1 ⇒ Harbor Commodity All-Weather Strategy ETF (HGER) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA 1 ⇒ Innovator Equity Managed Floor ETF (SFLR) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA 1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA 1 ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA 1 ⇒ SPDR Gold Shares (GLD) [EF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Traditional IRA 1 ⇒ State Street SPDR Portfolio S&P 500 ETF (SPYM) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Traditional IRA 2 - Spouse ⇒ Aristotle Floating Rate Income Fund Class I (PLFRX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA 2 - Spouse ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA 2 - Spouse ⇒ Capital Group Core Plus Income ETF (CGCP) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA 2 - Spouse ⇒ Cash [BA]	SP	\$1,001 - \$15,000	None		
Traditional IRA 2 - Spouse ⇒ Dimensional International Core Equity Market ETF (DFAI) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA 2 - Spouse ⇒ F/m US Treasury 3 Month Bill Fund (TBIL) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA 2 - Spouse ⇒ Innovator Equity Managed Floor ETF (SFLR) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA 2 - Spouse ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA 2 - Spouse ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Traditional IRA 2 - Spouse ⇒ SPDR Gold Shares (GLD) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		

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

## SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Alvarado Medical Services, LLC	Physician Salary	\$60,000.00	\$180,000.00
State of Tennessee	Commissioner of Department of Health Salary	N/A	\$157,584.00
Nashville Medical Investor	Spouse Salary	N/A	\$10,403.21
Broad River Rehabilitation, LLC	Spouse Salary	N/A	\$12,125.26
Mt. Sterling Health	Spouse Salary	\$18,500.00	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Citizens Bank	October 2020	Primary Mortgage	\$250,001 - \$500,000
JT	Citizens Bank of Kentucky	October 2020	Home Equity Line of Credit	\$50,001 - \$100,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Job Creators Network
Chief Executive Officer	Alvarado Medical Services, LLC
Board Committee Member	Eastern Kentucky University - College of Medicine

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2015	State of Kentucky	Kentucky Legislators Hybrid Cash Balance Plan - Legislative Retirement Pension

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

Source (Name and Address)	Brief Description of Duties
Bluegrass Health Partners (Richmond, KY, US)	Medical Directorship
Wesley Village (Wilmore, KY, US)	Medical Directorship

Source (Name and Address)	Brief Description of Duties
Winchester Senior Partners, LLC (Winchester, KY, US)	Medical Directorship

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Traditional IRA 1
- Traditional IRA 2 - Spouse (Owner: SP)
- Roth IRA 1
- Roth IRA 2 - Spouse (Owner: SP)
- Managed Account - Pershing
- AMS - Keough
- AMS Defined Benefit Plan
- Health Savings Account 1 (Owner: JT)  
LOCATION: US
- Health Savings Account 2 (Owner: JT)  
LOCATION: US

## 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:** Ralph A. Alvarado , 05/11/2026