



Filing ID #10081220

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Leela J. Gray  
**Status:** Congressional Candidate  
**State/District:** FL13

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2026  
**Filing Date:** 07/14/2026  
**Period Covered:** 01/01/2025– 06/14/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset                                                                                                                                                                                                                                                                | Owner | Value of Asset        | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-----------------------|----------------|-------------------------------|-----------------------|
| Antero Resources Corporation [MO]<br><br>LOCATION: Wetzel, WV, US<br>DESCRIPTION: Net Acres: 0.02052<br>COMMENTS: This small parcel of oil and gas rights was owned by paternal grandfather and passed down and shared with my siblings after my father passed away. |       | \$1 - \$1,000         | Dividends      | \$201 - \$1,000               | \$201 - \$1,000       |
| Bank of America Corporation Common Stock (BAC) [ST]                                                                                                                                                                                                                  | SP    | \$1,001 - \$15,000    | None           |                               |                       |
| USAA Federal Savings Bank [BA]                                                                                                                                                                                                                                       | JT    | \$100,001 - \$250,000 | Interest       | \$1 - \$200                   | \$1 - \$200           |
| Yazam, Inc. DBA Empower [RS]<br><br>DESCRIPTION: Board Director                                                                                                                                                                                                      |       | Undetermined          | None           |                               |                       |
| Yazam, Inc. DBA Empower [OP]<br><br>DESCRIPTION: Board Director                                                                                                                                                                                                      |       | Undetermined          | None           |                               |                       |
| Fidelity Brokerage Account ⇒<br>Arista Networks, Inc. Common Stock (ANET) [ST]                                                                                                                                                                                       |       | \$15,001 - \$50,000   | 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> |
|-------------------------------------------------------------------------------------------------|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Fidelity Brokerage Account ⇒<br>ConnectM Technology Solutions, Inc. - Common Stock (CNTM) [ST]  |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fidelity Brokerage Account ⇒<br>Cycurion, Inc. - Common Stock (CYCU) [ST]                       |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fidelity Brokerage Account ⇒<br>Fidelity Money Market (SPRXX) [BA]                              |              | \$15,001 - \$50,000   | Interest              | \$1 - \$200                          | \$1 - \$200                  |
| Fidelity Brokerage Account ⇒<br>Fidelity Money Market (SPRXX) [BA]                              |              | \$15,001 - \$50,000   | None                  |                                      |                              |
| Fidelity Brokerage Account ⇒<br>First Trust Cloud Computing ETF (SKYY) [EF]                     |              | \$50,001 - \$100,000  | None                  |                                      |                              |
| Fidelity Brokerage Account ⇒<br>Mondelez International, Inc. - Class A Common Stock (MDLZ) [ST] |              | \$15,001 - \$50,000   | None                  |                                      |                              |
| Fidelity Brokerage Account ⇒<br>State Street Utilities Select Sector SPDR ETF (XLU) [EF]        |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fidelity Brokerage Account ⇒<br>Victory 500 Index Fund Reward Shares (USPRX) [MF]               |              | \$100,001 - \$250,000 | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>AbbVie Inc. Common Stock (ABBV) [ST]                             |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Alphabet Inc. - Class A Common Stock (GOOGL) [ST]                |              | \$15,001 - \$50,000   | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Amazon.com, Inc. - Common Stock (AMZN) [ST]                      |              | \$15,001 - \$50,000   | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>American Express Company Common Stock (AXP) [ST]                 |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Amgen Inc. - Common Stock (AMGN) [ST]                            |              | \$15,001 - \$50,000   | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Anheuser-Busch Inbev SA Sponsored ADR (BUD) [ST]                 |              | \$1,001 - \$15,000    | None                  |                                      |                              |

| <b>Asset</b>                                                                               | <b>Owner</b> | <b>Value of Asset</b>   | <b>Income Type(s)</b> | <b>Income<br/>Current<br/>Year to<br/>Filing</b> | <b>Income<br/>Preceding<br/>Year</b> |
|--------------------------------------------------------------------------------------------|--------------|-------------------------|-----------------------|--------------------------------------------------|--------------------------------------|
| Fishers Brokerage Account ⇒<br>Apple Inc. - Common Stock (AAPL) [ST]                       |              | \$50,001 -<br>\$100,000 | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>ASML Holding N.V. - New York Registry Shares (ASML)<br>[ST] |              | \$15,001 - \$50,000     | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>BAE SYSTEMS plc Sponsored ADR (BAESY) [ST]                  |              | \$1,001 - \$15,000      | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Bank of America Corporation Common Stock (BAC) [ST]         |              | \$1,001 - \$15,000      | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Barclays PLC Common Stock (BCS) [ST]                        |              | \$1,001 - \$15,000      | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>BHP Group Limited American Depositary Shares (BHP)<br>[ST]  |              | \$1,001 - \$15,000      | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Boeing Company (BA) [ST]                                    |              | \$1,001 - \$15,000      | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>BP p.l.c. Common Stock (BP) [ST]                            |              | \$1,001 - \$15,000      | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Broadcom Inc. - Common Stock (AVGO) [ST]                    |              | \$15,001 - \$50,000     | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Carrier Global Corporation Common Stock (CARR) [ST]         |              | \$1,001 - \$15,000      | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Caterpillar, Inc. Common Stock (CAT) [ST]                   |              | \$15,001 - \$50,000     | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Charles Schwab Corporation (SCHW) [ST]                      |              | \$1,001 - \$15,000      | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Chevron Corporation Common Stock (CVX) [ST]                 |              | \$1,001 - \$15,000      | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒                                                                |              | \$1,001 - \$15,000      | None                  |                                                  |                                      |

| Asset                                                                                       | Owner | Value of Asset      | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---------------------------------------------------------------------------------------------|-------|---------------------|----------------|-------------------------------|-----------------------|
| Cisco Systems, Inc. - Common Stock (CSCO) [ST]                                              |       |                     |                |                               |                       |
| Fishers Brokerage Account ⇒<br>Citigroup, Inc. Common Stock (C) [ST]                        |       | \$15,001 - \$50,000 | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>Compagnie Financiere Richemont Un-sponsored ADR (CFRUY) [ST] |       | \$1,001 - \$15,000  | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>Costco Wholesale Corporation - Common Stock (COST) [ST]      |       | \$1,001 - \$15,000  | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>CSX Corporation - Common Stock (CSX) [ST]                    |       | \$1,001 - \$15,000  | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>Danaher Corporation Common Stock (DHR) [ST]                  |       | \$1,001 - \$15,000  | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>Deere & Company Common Stock (DE) [ST]                       |       | \$1,001 - \$15,000  | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>DEUTSCHE TELEKOM AG S/ADR (DTEGY) [ST]                       |       | \$1,001 - \$15,000  | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>Eli Lilly and Company Common Stock (LLY) [ST]                |       | \$15,001 - \$50,000 | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>Emerson Electric Company Common Stock (EMR) [ST]             |       | \$15,001 - \$50,000 | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>Exxon Mobil Corporation Common Stock (XOM) [ST]              |       | \$1,001 - \$15,000  | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>FAST RETAILING UNSP/ADR (FRCOY) [ST]                         |       | \$1,001 - \$15,000  | None           |                               |                       |
| Fishers Brokerage Account ⇒<br>FDIC Sweep Accts for IRA and ROTH [BA]                       |       | \$1,001 - \$15,000  | Interest       | \$1 - \$200                   | \$1 - \$200           |
| Fishers Brokerage Account ⇒<br>Freeport-McMoRan, Inc. Common Stock (FCX) [ST]               |       | \$1,001 - \$15,000  | None           |                               |                       |

| <b>Asset</b>                                                                           | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income<br/>Current<br/>Year to<br/>Filing</b> | <b>Income<br/>Preceding<br/>Year</b> |
|----------------------------------------------------------------------------------------|--------------|-----------------------|-----------------------|--------------------------------------------------|--------------------------------------|
| Fishers Brokerage Account ⇒<br>GE Aerospace Common Stock (GE) [ST]                     |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>GE Vernova Inc. Common Stock (GEV) [ST]                 |              | \$15,001 - \$50,000   | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Goldman Sachs Group, Inc. (GS) [ST]                     |              | \$15,001 - \$50,000   | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>GSK plc American Depositary Shares (GSK) [ST]           |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>HERMES INTL SA UNSP/ADR (HESAY) [ST]                    |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Home Depot, Inc. (HD) [ST]                              |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Honda Motor Company, Ltd. Common Stock (HMC) [ST]       |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>HSBC Holdings, plc. Common Stock (HSBC) [ST]            |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Intesa Sanpaolo S.P.A. Sponsored ADR (ISNPY) [ST]       |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Johnson & Johnson Common Stock (JNJ) [ST]               |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>JP Morgan Chase & Co. Common Stock (JPM) [ST]           |              | \$15,001 - \$50,000   | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>L'Oreal Co. American Depositary Shares (LRLCY) [ST]     |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Mastercard Incorporated Common Stock (MA) [ST]          |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Meta Platforms, Inc. - Class A Common Stock (META) [ST] |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒                                                            |              | \$15,001 - \$50,000   | 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> |
|-----------------------------------------------------------------------------------------------|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Microsoft Corporation - Common Stock (MSFT) [ST]                                              |              |                       |                       |                                      |                              |
| Fishers Brokerage Account ⇒<br>MITSUBISHI HVY IND U/ADR (MHVIY) [ST]                          |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Mitsubishi UFJ Financial Group, Inc. Common Stock (MUFG) [ST]  |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Mitsui & Company, Ltd. American Depositary Shares (MITSY) [ST] |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Morgan Stanley Common Stock (MS) [ST]                          |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>National Australia Bank Limited (NABZY) [ST]                   |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>NESTLE S.A S/ADR (NSRGY) [ST]                                  |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Netflix, Inc. - Common Stock (NFLX) [ST]                       |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Novartis AG Common Stock (NVS) [ST]                            |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>NVIDIA Corporation - Common Stock (NVDA) [ST]                  |              | \$50,001 - \$100,000  | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Oracle Corporation Common Stock (ORCL) [ST]                    |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>PACCAR Inc. - Common Stock (PCAR) [ST]                         |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Palo Alto Networks, Inc. - Common Stock (PANW) [ST]            |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>PANASONIC HLDS UNSP/ADR (PCRHY) [ST]                           |              | \$1,001 - \$15,000    | None                  |                                      |                              |

| <b>Asset</b>                                                                                    | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income<br/>Current<br/>Year to<br/>Filing</b> | <b>Income<br/>Preceding<br/>Year</b> |
|-------------------------------------------------------------------------------------------------|--------------|-----------------------|-----------------------|--------------------------------------------------|--------------------------------------|
| Fishers Brokerage Account ⇒<br>Pepsico, Inc. (PEP) [ST]                                         |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Pfizer, Inc. Common Stock (PFE) [ST]                             |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Procter & Gamble Company (PG) [ST]                               |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Rio Tinto Plc Common Stock (RIO) [ST]                            |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>ROCHE HOLDING LTD S/ADR (RHHBY) [ST]                             |              | \$15,001 - \$50,000   | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Royal Bank Of Canada Common Stock (RY) [ST]                      |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>RTX Corporation Common Stock (RTX) [ST]                          |              | \$15,001 - \$50,000   | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>SAP SE ADS (SAP) [ST]                                            |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>ServiceNow, Inc. Common Stock (NOW) [ST]                         |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Shell PLC American Depositary Shares (SHEL) [ST]                 |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Siemens AG American Depositary Shares (SIEGY) [ST]               |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>SMC CORP JAPAN S/ADR (SMCAY) [ST]                                |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Societe Generale France Sponsored ADR (SCGLY) [ST]               |              | \$1,001 - \$15,000    | None                  |                                                  |                                      |
| Fishers Brokerage Account ⇒<br>Sony Group Corporation American Depositary Shares<br>(SONY) [ST] |              | \$1,001 - \$15,000    | 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> |
|-------------------------------------------------------------------------------------------|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Fishers Brokerage Account ⇒<br>Spotify Technology S.A. Ordinary Shares (SPOT) [ST]        |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Starbucks Corporation - Common Stock (SBUX) [ST]           |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST] |              | \$15,001 - \$50,000   | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Thermo Fisher Scientific Inc Common Stock (TMO) [ST]       |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Tokyo Electron Ltd Unsponsored ADR (TOELY) [ST]            |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>UBS Group AG Registered Ordinary Shares (UBS) [ST]         |              | \$15,001 - \$50,000   | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>UNICREDITO SPA UNSP/ADR (UNCRY) [ST]                       |              | \$15,001 - \$50,000   | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Unilever PLC American Depositary Shares (UL) [ST]          |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Union Pacific Corporation Common Stock (UNP) [ST]          |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>UnitedHealth Group Incorporated Common Stock (UNH) [ST]    |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Visa Inc. (V) [ST]                                         |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Brokerage Account ⇒<br>Walmart Inc. - Common Stock (WMT) [ST]                     |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fishers Rollover IRA ⇒<br>Alphabet Inc. - Class A Common Stock (GOOGL) [ST]               |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |
| Fishers Rollover IRA ⇒<br>Amazon.com, Inc. - Common Stock (AMZN) [ST]                     |              | \$1,001 - \$15,000    | Tax-Deferred          |                                      |                              |



| Asset                                                                                 | Owner | Value of Asset     | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---------------------------------------------------------------------------------------|-------|--------------------|----------------|-------------------------------|-----------------------|
| Fishers Rollover IRA ⇒<br>Apple Inc. - Common Stock (AAPL) [ST]                       |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>ASML Holding N.V. - New York Registry Shares (ASML) [ST]    |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Broadcom Inc. - Common Stock (AVGO) [ST]                    |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Caterpillar, Inc. Common Stock (CAT) [ST]                   |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Compagnie Financiere Richemont Unsponsored ADR (CFRUY) [ST] |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Deutsche Boerse Ag Unsponsored ADR (DBOXY) [ST]             |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Eli Lilly and Company Common Stock (LLY) [ST]               |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Franklin FTSE Japan ETF (FLJP) [EF]                         |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Goldman Sachs Group, Inc. (GS) [ST]                         |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Invesco KBW Bank ETF (KBWB) [EF]                            |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>iShares Global Consumer Staples ETF (KXI) [EF]              |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>iShares Global Industrials ETF (EXI) [EF]                   |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>JP Morgan Chase & Co. Common Stock (JPM) [ST]               |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Meta Platforms, Inc. - Class A Common Stock (META) [ST]     |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |

| Asset                                                                                                                          | Owner | Value of Asset     | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--------------------------------------------------------------------------------------------------------------------------------|-------|--------------------|----------------|-------------------------------|-----------------------|
| Fishers Rollover IRA ⇒<br>Microsoft Corporation - Common Stock (MSFT) [ST]                                                     |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>MITSUBISHI HVY IND U/ADR (MHVIY) [ST]                                                                |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Morgan Stanley Common Stock (MS) [ST]                                                                |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>NVIDIA Corporation - Common Stock (NVDA) [ST]                                                        |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Oracle Corporation Common Stock (ORCL) [ST]                                                          |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Portfolio Building Block European Banks Index ETF (PBEU) [EF]                                        |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Portfolio Building Block Integrated Oil and Gas and Exploration and Production Index ETF (PBOG) [EF] |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Portfolio Building Block World Pharma and Biotech Index ETF (PBPH) [EF]                              |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Rio Tinto Plc Common Stock (RIO) [ST]                                                                |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>ROLLS ROYCE HLDGS S/ADR (RYCEY) [ST]                                                                 |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Royal Bank Of Canada Common Stock (RY) [ST]                                                          |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>SAP SE ADS (SAP) [ST]                                                                                |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Sony Group Corporation American Depositary Shares (SONY) [ST]                                        |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |

| Asset                                                                                             | Owner | Value of Asset       | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---------------------------------------------------------------------------------------------------|-------|----------------------|----------------|-------------------------------|-----------------------|
| Fishers Rollover IRA ⇒<br>Spotify Technology S.A. Ordinary Shares (SPOT) [ST]                     |       | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>State Street Industrial Select Sector SPDR ETF (XLI) [EF]               |       | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]              |       | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>UnitedHealth Group Incorporated Common Stock (UNH) [ST]                 |       | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Vanguard FTSEEuropean ETF (VGK) [EF]                                    |       | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA ⇒<br>Visa Inc. (V) [ST]                                                      |       | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA Spouse ⇒<br>Vanguard 500 Index Fund Institutional Select Shares (VFFSX) [MF] |       | \$50,001 - \$100,000 | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA Spouse ⇒<br>Vanguard FTSE Developed Markets ETF (VEA) [EF]                   |       | \$15,001 - \$50,000  | Tax-Deferred   |                               |                       |
| Fishers Rollover IRA Spouse ⇒<br>Vanguard S&P 500 ETF (VOO) [EF]                                  |       | \$15,001 - \$50,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA ⇒<br>Alphabet Inc. - Class A Common Stock (GOOGL) [ST]                           |       | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA ⇒<br>Amazon.com, Inc. - Common Stock (AMZN) [ST]                                 |       | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA ⇒<br>Apple Inc. - Common Stock (AAPL) [ST]                                       |       | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA ⇒<br>ASML Holding N.V. - New York Registry Shares (ASML) [ST]                    |       | \$1,001 - \$15,000   | Tax-Deferred   |                               |                       |
|                                                                                                   |       |                      |                |                               |                       |

| Asset                                                                                 | Owner | Value of Asset     | Income Type(s) | Income<br>Current<br>Year to<br>Filing | Income<br>Preceding<br>Year |
|---------------------------------------------------------------------------------------|-------|--------------------|----------------|----------------------------------------|-----------------------------|
| Fishers ROTH IRA ⇒<br>Broadcom Inc. - Common Stock (AVGO) [ST]                        |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Caterpillar, Inc. Common Stock (CAT) [ST]                       |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Compagnie Financiere Richemont Un-sponsored ADR<br>(CFRUY) [ST] |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Deutsche Boerse Ag Un-sponsored ADR (DBOXY) [ST]                |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Eli Lilly and Company Common Stock (LLY) [ST]                   |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Franklin FTSE Japan ETF (FLJP) [EF]                             |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Goldman Sachs Group, Inc. (GS) [ST]                             |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Invesco KBW Bank ETF (KBWB) [EF]                                |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>iShares Global Consumer Staples ETF (KXI) [EF]                  |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>iShares Global Industrials ETF (EXI) [EF]                       |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>iShares Global Tech ETF (IXN) [EF]                              |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>JP Morgan Chase & Co. Common Stock (JPM) [ST]                   |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Meta Platforms, Inc. - Class A Common Stock (META) [ST]         |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Microsoft Corporation - Common Stock (MSFT) [ST]                |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
|                                                                                       |       |                    |                |                                        |                             |

| Asset                                                                                                                         | Owner | Value of Asset     | Income Type(s) | Income<br>Current<br>Year to<br>Filing | Income<br>Preceding<br>Year |
|-------------------------------------------------------------------------------------------------------------------------------|-------|--------------------|----------------|----------------------------------------|-----------------------------|
| Fishers ROTH IRA ⇒<br>MITSUBISHI HVY IND U/ADR (MHVIY) [ST]                                                                   |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Morgan Stanley Common Stock (MS) [ST]                                                                   |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>NVIDIA Corporation - Common Stock (NVDA) [ST]                                                           |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Oracle Corporation Common Stock (ORCL) [ST]                                                             |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Portfolio Building Block European Banks Index ETF<br>(PBEU) [EF]                                        |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Portfolio Building Block Integrated Oil and Gas and<br>Exploration and Production Index ETF (PBOG) [EF] |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Portfolio Building Block World Pharma and Biotech Index<br>ETF (PBPH) [EF]                              |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Rio Tinto Plc Common Stock (RIO) [ST]                                                                   |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>ROLLS ROYCE HLDGS S/ADR (RYCEY) [ST]                                                                    |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Royal Bank Of Canada Common Stock (RY) [ST]                                                             |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>SAP SE ADS (SAP) [ST]                                                                                   |       | \$1 - \$1,000      | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Sony Group Corporation American Depositary Shares<br>(SONY) [ST]                                        |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒<br>Spotify Technology S.A. Ordinary Shares (SPOT) [ST]                                                     |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA ⇒                                                                                                            |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |

| Asset                                                                              | Owner | Value of Asset      | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|------------------------------------------------------------------------------------|-------|---------------------|----------------|-------------------------------|-----------------------|
| State Street Industrial Select Sector SPDR ETF (XLI) [EF]                          |       |                     |                |                               |                       |
| Fishers ROTH IRA ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]      |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]         |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA ⇒ Vanguard FTSEEuropean ETF (VGK) [EF]                            |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA ⇒ Visa Inc. (V) [ST]                                              |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒ AbbVie Inc. Common Stock (ABBV) [ST]                     |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒ ADIDAS AG S/ADR (ADDYY) [ST]                             |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]        |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]              |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒ American Express Company Common Stock (AXP) [ST]         |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒ Anheuser-Busch Inbev SA Sponsored ADR (BUD) [ST]         |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒ Apple Inc. - Common Stock (AAPL) [ST]                    |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST] |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒ AstraZeneca PLC - American Depositary Shares (AZN) [ST]  |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |

| <b>Asset</b>                                                                              | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income<br/>Current<br/>Year to<br/>Filing</b> | <b>Income<br/>Preceding<br/>Year</b> |
|-------------------------------------------------------------------------------------------|--------------|-----------------------|-----------------------|--------------------------------------------------|--------------------------------------|
| Fishers ROTH IRA Spouse ⇒<br>Bank of America Corporation Common Stock (BAC) [ST]          |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Barclays PLC Common Stock (BCS) [ST]                         |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>BHP Group Limited American Depositary Shares (BHP)<br>[ST]   |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Boeing Company (BA) [ST]                                     |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>BP p.l.c. Common Stock (BP) [ST]                             |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Broadcom Inc. - Common Stock (AVGO) [ST]                     |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Canadian Imperial Bank of Commerce Common Stock (CM)<br>[ST] |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Caterpillar, Inc. Common Stock (CAT) [ST]                    |              | \$15,001 - \$50,000   | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Charles Schwab Corporation (SCHW) [ST]                       |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Chevron Corporation Common Stock (CVX) [ST]                  |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Cisco Systems, Inc. - Common Stock (CSCO) [ST]               |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Citigroup, Inc. Common Stock (C) [ST]                        |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>CMNWLTH BK AUSTRLA S/ADR (CMWAY) [ST]                        |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Costco Wholesale Corporation - Common Stock (COST)           |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |

| <b>Asset</b>                                                                    | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income<br/>Current<br/>Year to<br/>Filing</b> | <b>Income<br/>Preceding<br/>Year</b> |
|---------------------------------------------------------------------------------|--------------|-----------------------|-----------------------|--------------------------------------------------|--------------------------------------|
| [ST]                                                                            |              |                       |                       |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>CSX Corporation (CSX) [ST]                         |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Cummins Inc. Common Stock (CMI) [ST]               |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Danaher Corporation Common Stock (DHR) [ST]        |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Deere & Company Common Stock (DE) [ST]             |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Deutsche Bank AG Common Stock (DB) [ST]            |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Deutsche Telekom AG (DTEGY) [ST]                   |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Eli Lilly and Company Common Stock (LLY) [ST]      |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Emerson Electric Company Common Stock (EMR) [ST]   |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Exxon Mobil Corporation Common Stock (XOM) [ST]    |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>FANUC CORP UNSP/ADR (FANUY) [ST]                   |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Fast Retailing Co Ltd Unsponsored ADR (FRCOY) [ST] |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>Freeport-McMoRan, Inc. Common Stock (FCX) [ST]     |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>GE Aerospace Common Stock (GE) [ST]                |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |
| Fishers ROTH IRA Spouse ⇒<br>GE Vernova Inc. Common Stock (GEV) [ST]            |              | \$1,001 - \$15,000    | Tax-Deferred          |                                                  |                                      |



| Asset                                                                                                                  | Owner | Value of Asset     | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|------------------------------------------------------------------------------------------------------------------------|-------|--------------------|----------------|-------------------------------|-----------------------|
| Fishers ROTH IRA Spouse ⇒<br>Goldman Sachs Group, Inc. (GS) [ST]                                                       |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>GSK plc American Depositary Shares (GSK) [ST]                                             |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Home Depot, Inc. (HD) [ST]                                                                |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>HSBC Holdings, plc. Common Stock (HSBC) [ST]                                              |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Illinois Tool Works Inc. Common Stock (ITW) [ST]                                          |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Intesa Sanpaolo S.P.A. Sponsored ADR (ISNPY) [ST]                                         |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Intuitive Surgical, Inc. - Common Stock (ISRG) [ST]                                       |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Johnson & Johnson Common Stock (JNJ) [ST]                                                 |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Johnson Controls International plc Ordinary Share (JCI) [ST]                              |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>JP Morgan Chase & Co. Common Stock (JPM) [ST]                                             |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>L'Oreal Co. American Depositary Shares (LRLCY) [ST]                                       |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>LVMH Moët Hennessy Louis Vuitton Un-sponsored<br>American Depositary Receipt (LVMUY) [ST] |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Mastercard Incorporated Common Stock (MA) [ST]                                            |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒                                                                                              |       | \$1,001 - \$15,000 | Tax-Deferred   |                               |                       |

| Asset                                                                                      | Owner | Value of Asset      | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--------------------------------------------------------------------------------------------|-------|---------------------|----------------|-------------------------------|-----------------------|
| Merck & Company, Inc. Common Stock (MRK) [ST]                                              |       |                     |                |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Meta Platforms, Inc. - Class A Common Stock (META) [ST]       |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Microsoft Corporation - Common Stock (MSFT) [ST]              |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>MITSUBISHI HVY IND U/ADR (MHVIY) [ST]                         |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Mitsubishi UFJ Financial Group, Inc. Common Stock (MUFG) [ST] |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Morgan Stanley Common Stock (MS) [ST]                         |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Murata Manufacturing Co Ltd Unsponsored ADR (MRAAY) [ST]      |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>NESTLE S.A S/ADR (NSRGY) [ST]                                 |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Netflix, Inc. - Common Stock (NFLX) [ST]                      |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Novartis AG Common Stock (NVS) [ST]                           |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>NVIDIA Corporation - Common Stock (NVDA) [ST]                 |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Oracle Corporation Common Stock (ORCL) [ST]                   |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Palo Alto Networks, Inc. (PANW) [ST]                          |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Fishers ROTH IRA Spouse ⇒<br>Pepsico, Inc. (PEP) [ST]                                      |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
|                                                                                            |       |                     |                |                               |                       |

| Asset                                                                                           | Owner | Value of Asset     | Income Type(s) | Income<br>Current<br>Year to<br>Filing | Income<br>Preceding<br>Year |
|-------------------------------------------------------------------------------------------------|-------|--------------------|----------------|----------------------------------------|-----------------------------|
| Fishers ROTH IRA Spouse ⇒<br>Pfizer, Inc. Common Stock (PFE) [ST]                               |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Procter & Gamble Company (PG) [ST]                                 |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Rio Tinto Plc Common Stock (RIO) [ST]                              |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Roche Holdings AG Basel American Depositary Shares<br>(RHHBY) [ST] |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>RTX Corporation Common Stock (RTX) [ST]                            |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Safran S.A. Unsponsored ADR (SAFRY) [ST]                           |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Salesforce, Inc. Common Stock (CRM) [ST]                           |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>SAP SE ADS (SAP) [ST]                                              |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>ServiceNow, Inc. Common Stock (NOW) [ST]                           |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Shell PLC American Depositary Shares (SHEL) [ST]                   |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Siemens AG American Depositary Shares (SIEGY) [ST]                 |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Societe Generale France Sponsored ADR (SCGLY) [ST]                 |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Sony Group Corporation American Depositary Shares<br>(SONY) [ST]   |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Spotify Technology S.A. Ordinary Shares (SPOT) [ST]                |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |

| Asset                                                                                      | Owner | Value of Asset     | Income Type(s) | Income<br>Current<br>Year to<br>Filing | Income<br>Preceding<br>Year |
|--------------------------------------------------------------------------------------------|-------|--------------------|----------------|----------------------------------------|-----------------------------|
| Fishers ROTH IRA Spouse ⇒<br>Starbucks Corporation - Common Stock (SBUX) [ST]              |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Sumitomo Corp American Depositary Shares (SSUMY) [ST]         |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Taiwan Semiconductor Manufacturing Company Ltd.<br>(TSM) [ST] |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Thermo Fisher Scientific Inc Common Stock (TMO) [ST]          |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Tokyo Electron Ltd Unsponsored ADR (TOELY) [ST]               |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Toyota Motor Corporation Common Stock (TM) [ST]               |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>UBS Group AG Registered Ordinary Shares (UBS) [ST]            |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>UNICREDITO SPA UNSP/ADR (UNCRY) [ST]                          |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Unilever PLC American Depositary Shares (UL) [ST]             |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Union Pacific Corporation Common Stock (UNP) [ST]             |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>UnitedHealth Group Incorporated Common Stock (UNH)<br>[ST]    |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Visa Inc. (V) [ST]                                            |       | \$1,001 - \$15,000 | Tax-Deferred   |                                        |                             |
| Fishers ROTH IRA Spouse ⇒<br>Walmart Inc. - Common Stock (WMT) [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<br>Current Year to<br>Filing | Amount<br>Preceding Year |
|-----------------|---------------|-------------------------------------|--------------------------|
| Bank of America | Spouse Income | N/A                                 | N/A                      |
| Gillman Bagley  | Spouse Income | N/A                                 | N/A                      |

**SCHEDULE D: LIABILITIES**

None disclosed.

**SCHEDULE E: POSITIONS**

| Position          | Name of Organization                                        |
|-------------------|-------------------------------------------------------------|
| Board Director    | Monterey Capital Acquisition Corporation                    |
| Board Director    | Yazam, Inc. DBA Empower                                     |
| Board of Advisors | Elanah AI                                                   |
| Board Director    | National Association of Corporate Directors Florida Chapter |
| Board Director    | Gary Sinise Foundation Board - Florida Chapter              |

**SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

**SCHEDULE A INVESTMENT VEHICLE DETAILS**

|                                                                                                                                                                                                                                                    |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>◦ Fishers Brokerage Account</li><li>◦ Fishers ROTH IRA</li><li>◦ Fishers Rollover IRA</li><li>◦ Fidelity Brokerage Account</li><li>◦ Fishers Rollover IRA Spouse</li><li>◦ Fishers ROTH IRA Spouse</li></ul> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## 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:** Leela J. Gray , 07/14/2026