



Filing ID #20030296

PERIODIC TRANSACTION REPORT

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FILER INFORMATION

Name: Hon. Julie Johnson**Status:** Member**State/District:** TX32

TRANSACTIONS

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT		3M Company Common Stock (MMM) [ST] FILING STATUS: New SUBHOLDING OF: Chase Brokerage Account (3935)	P	04/01/2025	05/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		3M Company Common Stock (MMM) [ST] FILING STATUS: New SUBHOLDING OF: Chase Brokerage Account (3935)	P	04/11/2025	05/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Adobe Inc. - Common Stock (ADBE) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Agilent Technologies, Inc. Common Stock (A) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Allstate Corporation (ALL) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Alphabet Inc. - Class C Capital Stock (GOOG) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT	Amazon.com, Inc. - Common Stock (AMZN) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT	Apple Inc. - Common Stock (AAPL) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Apple Inc. - Common Stock (AAPL) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	03/31/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Aptiv PLC Ordinary Shares (APTV) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Arista Networks, Inc. Common Stock (ANET) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	ASML Holding N.V. - New York Registry Shares (ASML) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	AutoZone, Inc. Common Stock (AZO) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Ball Corporation Common Stock (BALL) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Bio-Techne Corp - Common Stock (TECH) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT		Blackstone Inc. Common Stock (BX) [ST] FILING STATUS: New SUBHOLDING OF: Chase Brokerage Account (3935)	S (partial)	04/22/2025	05/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Blue Bird Corporation - Common Stock (BLBD) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Boeing Company (BA) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		BorgWarner Inc. Common Stock (BWA) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Bristol-Myers Squibb Company Common Stock (BMY) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Camden Property Trust Common Stock (CPT) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Capital One Financial Corporation Common Stock (COF) [ST] FILING STATUS: New SUBHOLDING OF: Chase Brokerage Account (3935)	P	04/01/2025	05/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Carlisle Companies Incorporated Common Stock (CSL) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Chevron Corporation Common Stock (CVX) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Chevron Corporation Common Stock	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		(CVX) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core					<input type="checkbox"/>
JT		Chubb Limited Common Stock (CB) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Comcast Corporation - Class A Common Stock (CMCSA) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		ConAgra Brands, Inc. Common Stock (CAG) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		ConocoPhillips Common Stock (COP) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Constellation Brands, Inc. Common Stock (STZ) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Constellation Energy Corporation - Common Stock (CEG) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Crown Castle Inc. Common Stock (CCI) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		CVS Health Corporation Common Stock (CVS) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Delta Air Lines, Inc. Common Stock	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>

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		(DAL) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth					<input type="checkbox"/>
JT		Discover Financial Services Common Stock (DFS) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Dollar Tree, Inc. - Common Stock (DLTR) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		DT Midstream, Inc. Common Stock (DTM) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Eaton Corporation, PLC Ordinary Shares (ETN) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Eaton Corporation, PLC Ordinary Shares (ETN) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Edison International Common Stock (EIX) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Electronic Arts Inc. - Common Stock (EA) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Eli Lilly and Company Common Stock (LLY) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Equinix, Inc. - Common Stock (EQIX)	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>

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		[ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth					<input type="checkbox"/>
JT		Eversource Energy (ES) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Exxon Mobil Corporation Common Stock (XOM) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		FactSet Research Systems Inc. Common Stock (FDS) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		FedEx Corporation Common Stock (FDX) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Fidelity National Information Services, Inc. Common Stock (FIS) [ST] FILING STATUS: New SUBHOLDING OF: Chase Brokerage Account (3935)	P	04/22/2025	05/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Fidelity National Information Services, Inc. Common Stock (FIS) [ST] FILING STATUS: New SUBHOLDING OF: Chase Brokerage Account (3935)	P	04/30/2025	05/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Fiserv, Inc. Common Stock (FI) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Ford Motor Company Common Stock (F) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

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JT		Freeport-McMoRan, Inc. Common Stock (FCX) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Generac Holdings Inc. Common Stock (GNRC) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Global Payments Inc. Common Stock (GPN) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Hasbro, Inc. - Common Stock (HAS) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		HCA Healthcare, Inc. Common Stock (HCA) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Healthpeak Properties, Inc. Common Stock (DOC) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Henry Schein, Inc. - Common Stock (HSIC) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Home Depot, Inc. (HD) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Honeywell International Inc. (HON) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Honeywell International Inc. (HON)	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

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		[ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core					<input type="checkbox"/>
JT		Howmet Aerospace Inc. Common Stock (HWM) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Intuitive Surgical, Inc. - Common Stock (ISRG) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		J.B. Hunt Transport Services, Inc. - Common Stock (JBHT) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		JBT Marel Corporation Common Stock (JBTM) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Johnson & Johnson Common Stock (JNJ) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		JP Morgan Chase & Co. Common Stock (JPM) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Keurig Dr Pepper Inc. (KDP) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Kimberly-Clark Corporation Common Stock (KMB) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		L3Harris Technologies, Inc. Common Stock (LHX) [ST]	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

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		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core					
JT	L3	Harris Technologies, Inc. Common Stock (LHX) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Lam	Research Corporation - Common Stock (LRCX) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Las Vegas Sands Corp. (LVS)	Common Stock [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Lockheed Martin Corporation Common Stock (LMT) [ST]	 FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Lowe's Companies, Inc. Stock (LOW) [ST]	 FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Marathon Petroleum Corporation Common Stock (MPC) [ST]	 FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Marsh & McLennan Companies, Inc. Common Stock (MMC) [ST]	 FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Masco Corporation Common Stock (MAS) [ST]	 FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Meta Platforms, Inc. - Class A Common Stock (META) [ST]		S	04/07/2025	05/06/2025	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

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		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth					
JT		Mettler-Toledo International, Inc. Common Stock (MTD) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Micron Technology, Inc. - Common Stock (MU) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Microsoft Corporation - Common Stock (MSFT) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Microsoft Corporation - Common Stock (MSFT) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/01/2025	05/06/2025	\$15,001 - \$50,000	<input type="checkbox"/>
JT		Microsoft Corporation - Common Stock (MSFT) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Mondelez International, Inc. - Class A Common Stock (MDLZ) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Morgan Stanley Common Stock (MS) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		MSCI Inc. Common Stock (MSCI) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Netflix, Inc. - Common Stock (NFLX) [ST]	S	04/07/2025	05/06/2025	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

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		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth					
JT		NextEra Energy, Inc. Common Stock (NEE) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Norfolk Southern Corporation Common Stock (NSC) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		NVIDIA Corporation - Common Stock (NVDA) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT		ON Semiconductor Corporation - Common Stock (ON) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Oracle Corporation Common Stock (ORCL) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Palantir Technologies Inc. - Class A Common Stock (PLTR) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Palo Alto Networks, Inc. (PANW) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		PayPal Holdings, Inc. - Common Stock (PYPL) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Pentair plc. Ordinary Share (PNR) [ST] FILING STATUS: New	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>

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		SUBHOLDING OF: Merrill Lynch Long Term Growth					
JT		PepsiCo, Inc. - Common Stock (PEP) [ST]	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core					
JT		PepsiCo, Inc. - Common Stock (PEP) [ST]	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core					
JT		Progressive Corporation (PGR) [ST]	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth					
JT		Prologis, Inc. Common Stock (PLD) [ST]	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core					
JT		PTC Inc. - Common Stock (PTC) [ST]	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core					
JT		Raymond James Financial, Inc. Common Stock (RJF) [ST]	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth					
JT		Realty Income Corporation Common Stock (O) [ST]	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core					
JT		Regeneron Pharmaceuticals, Inc. - Common Stock (REGN) [ST]	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core					
JT		Reliance, Inc. Common Stock (RS) [ST]	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth					

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT		Republic Services, Inc. Common Stock (RSG) [ST] FILING STATUS: New SUBHOLDING OF: Chase Brokerage Account (3935)	S (partial)	04/01/2025	05/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		RTX Corporation Common Stock (RTX) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		S&P Global Inc. Common Stock (SPGI) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Salesforce, Inc. Common Stock (CRM) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		SBA Communications Corporation - Class A Common Stock (SBAC) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Sherwin-Williams Company (SHW) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Smurfit WestRock plc Ordinary Shares (SW) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Starbucks Corporation - Common Stock (SBUX) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Stryker Corporation Common Stock (SYK) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT		Super Micro Computer, Inc. - Common Stock (SMCI) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Sysco Corporation Common Stock (SYN) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		T. Rowe Price Group, Inc. - Common Stock (TROW) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Target Corporation Common Stock (TGT) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Teradyne, Inc. (TER) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		The Hershey Company Common Stock (HSY) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		The J.M. Smucker Company Common Stock (SJM) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		The Kraft Heinz Company - Common Stock (KHC) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Thermo Fisher Scientific Inc Common Stock (TMO) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT		Trimble Inc. - Common Stock (TRMB) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		TXNM Energy, Inc. Common Stock (TXNM) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Uber Technologies, Inc. Common Stock (UBER) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Uber Technologies, Inc. Common Stock (UBER) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		United Parcel Service, Inc. Common Stock (UPS) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		United Parcel Service, Inc. Common Stock (UPS) [ST] FILING STATUS: New SUBHOLDING OF: Chase Brokerage Account (3935)	S (partial)	04/11/2025	05/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		United Parcel Service, Inc. Common Stock (UPS) [ST] FILING STATUS: New SUBHOLDING OF: Chase Brokerage Account (3935)	S (partial)	04/01/2025	05/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		United Parcel Service, Inc. Common Stock (UPS) [ST] FILING STATUS: New SUBHOLDING OF: Chase Brokerage Account (3935)	S	04/15/2025	05/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		UnitedHealth Group Incorporated Common Stock (UNH) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT		Verizon Communications Inc. Common Stock (VZ) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		VICI Properties Inc. Common Stock (VICI) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Visa Inc. (V) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT		Vistra Corp. Common Stock (VST) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		W.W. Grainger, Inc. Common Stock (GWW) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Walt Disney Company (DIS) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Waste Management, Inc. Common Stock (WM) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Weyerhaeuser Company Common Stock (WY) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S (partial)	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Willis Towers Watson Public Limited Company - Ordinary Shares (WTW) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	JT	Workday, Inc. - Class A Common Stock (WDAY) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Long Term Growth	S	04/07/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	JT	Zoetis Inc. Class A Common Stock (ZTS) [ST] FILING STATUS: New SUBHOLDING OF: Merrill Lynch Tax Efficient Core	S	04/01/2025	05/06/2025	\$1,001 - \$15,000	<input type="checkbox"/>

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

INVESTMENT VEHICLE DETAILS

- Chase Brokerage Account (3935) (Owner: JT)
LOCATION: US
- Merrill Lynch Long Term Growth (Owner: JT)
LOCATION: US
- Merrill Lynch Tax Efficient Core (Owner: JT)
LOCATION: US

INITIAL PUBLIC OFFERINGS

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Periodic Transaction Report are true, complete, and correct to the best of my knowledge and belief. Further, I CERTIFY that I have disclosed all transactions as required by the STOCK Act.

Digitally Signed: Hon. Julie Johnson , 05/14/2025