

 You must agree to the prohibitions on obtaining and use of financial disclosure reports.

Annual Report for Calendar 2025

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 Print Report

The following statements were checked before filing:

- ☒ I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- ☒ I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.

☐ I *omitted* assets because they meet the three-part test for exemption.

Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **No**

Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Spouse	Salary	Adelanto Health Care Ventures (AHCV) Austin, TX	> \$1,000	n/a
2	Self	Other (Advance)	Simon & Schuster LLC New York, NY	\$100,000.00	Net income \$51,000

Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

	Asset	Asset Type	Owner	Value	Income Type	Income
1	Aspiration (San Francisco, CA) <i>Type:</i> Checking, Savings	Bank Deposit	Joint	\$15,001 - \$50,000	None	None (or less than \$201)
2	Aspiration Fund Adviser LLC <i>Company:</i> Aspiration Fund Adviser LLC (Marina Del Rey, CA) <i>Description:</i> Investment Advisory Services	Corporate Securities Non-Public Stock	Self	\$15,001 - \$50,000	None	None (or less than \$201)
3	IRA Club	Retirement Plans IRA	Self	--		
3.1	NameCoach Inc. <i>Company:</i> NameCoach Inc. (Palo Alto, CA) <i>Filer comment:</i> Convertible Note. Pronunciation Guide Services	Accounts Receivable From a Business	Self	\$15,001 - \$50,000	None	None (or less than \$201)
4	National Association of Realtors Pension Plan	Retirement Plans Defined Benefit Pension Plan	Spouse	Unascertainable	None	None (or less than \$201)
5	UBS Simple IRA	Retirement Plans IRA	Spouse	--		
5.1	JFECX - Jpmorgan Smartretirement 2055 Fd C	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
6	USAA Federal Savings Bank (San Antonio, TX) <i>Type:</i> Checking	Bank Deposit	Self	\$1,001 - \$15,000	None	None (or less than \$201)
7	Arizona 529 Plan <i>Institution:</i> Charles Schwab <i>Filer comment:</i> Previously reported as dependent child asset since child is account beneficiary.	Education Savings Plans 529 College Savings Plan	Self	--		
7.1	Aggressive Track: 70% Equity Portfolio	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
8	J.P. Morgan Brokerage	Brokerage/Managed Account	Self	--		
8.1	Chase Deposit Sweep (New York, NY) <i>Type:</i> Brokerage Sweep Account	Bank Deposit	Self	\$1,001 - \$15,000	None	None (or less than \$201)
8.2	SMH - VanEck Semiconductor ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Excepted Investment Fund	\$201 - \$1,000
9	Arizona 529 Plan #2 <i>Institution:</i> Charles Schwab	Education Savings Plans 529 College Savings Plan	Self	--		
9.1	Aggressive Track: 95% Equity Portfolio <i>Filer comment:</i> Purchases less than \$1,000	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)

Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **Yes**

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
1	Self	SMH	VanEck Semiconductor ETF	Purchase	07/31/2025	\$1,001 - \$15,000	n/a
2	Self	SMH	VanEck Semiconductor ETF	Purchase	08/06/2025	\$1,001 - \$15,000	n/a
3	Self	SMH	VanEck Semiconductor ETF	Purchase	10/21/2025	\$1,001 - \$15,000	n/a
4	Self	SMH	VanEck Semiconductor ETF	Purchase	10/30/2025	\$1,001 - \$15,000	n/a
5	Self	SMH	VanEck Semiconductor ETF	Purchase	10/31/2025	\$15,001 - \$50,000	n/a
6	Self	--	Aggressive Track: 80% Equity Portfolio	Sale (Full)	02/05/2025	\$1,001 - \$15,000	n/a
7	Self	--	Aggressive Track: 70% Equity Portfolio	Purchase	02/05/2025	\$1,001 - \$15,000	n/a

Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **No**

Part 6. Travel

Did you, your spouse, or dependent child receive any [reportable travel](#)? **No**

Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2021	Joint	Mortgage	0	3.097% (30 years)	\$500,001 - \$1,000,000	Rocket Mortgage Coppell, TX	United Wholesale Mortgage loan transferred to Rocket Mortgage
2	2024	Joint	Home Equity Line of Credit	-	10.99% (on demand)	\$50,001 - \$100,000	NewRez LLC DBA Shellpoint Mortgage Servicing Greenville, SC	Searchlight Lending loan transferred to NewRez LLC DBA Shellpoint Mortgage Servicing
3	2025	Spouse	Revolving Charge	-	29.49% (NA)	\$10,001 - \$15,000	Citibank New York, NY	n/a
4	2025	Self	Revolving Charge	-	28.84% (NA)	\$15,001 - \$50,000	American Express New York, NY	n/a

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **No**

Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**

#	Date	Parties Involved	Type	Status and Terms	Comments
1	Jun 2025	Simon & Schuster New York, NY	Royalty Agreement	Advance and royalties based on customary and usual terms for book," American Corrido ".	n/a

Part 10. Compensation

Only required if you are a candidate or this is your first report: Did any person or entity pay more than \$5,000 to you or for services provided by you? **This is not my first report.**

Attachments & Comments

No attachments added.
No comments added.