UNITED STATES SENATE
FINANCIAL DISCLOSURES

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Annual Report for Calendar 2025

Mrs. Katie Britt (Britt, Katie)

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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? **Yes**

#	Date	Activity	Amount	Who Paid?	Who received payment?	Comments
1	05/15/2025	Appearance	$1,750.00	Jimmy Rane Foundation Abbeville, AL	Spouse	Spouse appeared at an event for the purpose of supporting a scholarship program in his capacity as a former NFL and Alabama football player

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	Fine Geddie and Associates, LLC Montgomery, AL	> $1,000	n/a

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	**CollegeCounts 529 Fund - Child 1** *Institution:* Alabama	Education Savings Plans 529 College Savings Plan	Spouse	--		
1.1	**ALMXA - Age-Based Moderate Ages 15-16 Portfolio**	Mutual Funds Mutual Fund	Spouse	$15,001 - $50,000	None	None (or less than $201)
1.2	**ALXMC - Age-Based Moderate Ages 15-16 Portfolio**	Mutual Funds Mutual Fund	Spouse	$1,001 - $15,000	None	None (or less than $201)
2	**CollegeCounts 529 Fund - Child 2** *Institution:* Alabama	Education Savings Plans 529 College Savings Plan	Spouse	--		
2.1	**ALMXA - Age-Based Moderate Ages 15-16 Portfolio**	Mutual Funds Mutual Fund	Spouse	$15,001 - $50,000	None	None (or less than $201)
2.2	**ALXMC - Age-Based Moderate Ages 15-16 Portfolio**	Mutual Funds Mutual Fund	Spouse	$1,001 - $15,000	None	None (or less than $201)
3	**Raymond James - Spouse IRA**	Retirement Plans IRA	Spouse	--		
3.1	AAPL **- Apple Inc. - Common Stock**	Corporate Securities Stock	Spouse	$100,001 - $250,000	None	None (or less than $201)
3.2	BRK.B **- Berkshire Hathaway Inc. New Common Stock**	Corporate Securities Stock	Spouse	$15,001 - $50,000	None	None (or less than $201)
3.3	SQ **- Block, Inc. Class A Common Stock,**	Corporate Securities Stock	Spouse	None (or less than $1,001)	None	None (or less than $201)

3.4	**FNSXX - FIMM Money Market Port Instl Cl M/M**	Mutual Funds Mutual Fund	Spouse	None (or less than $1,001)	None	None (or less than $201)
3.5	**Raymond James** (Birmingham, AL) *Type:* Brokerage Sweep Account	Bank Deposit	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.6	**GOOG - Alphabet Inc. - Class C Capital Stock**	Corporate Securities Stock	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.7	**AMZN - Amazon.com, Inc. - Common Stock**	Corporate Securities Stock	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.8	**EOG - EOG Resources, Inc. Common Stock**	Corporate Securities Stock	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.9	**JPM - JP Morgan Chase & Co. Common Stock**	Corporate Securities Stock	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.10	**MSFT - Microsoft Corporation - Common Stock**	Corporate Securities Stock	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.11	**NVDA - NVIDIA Corporation - Common Stock**	Corporate Securities Stock	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.12	**UPS - United Parcel Service, Inc. Common Stock**	Corporate Securities Stock	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.13	**V - Visa Inc.**	Corporate Securities Stock	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.14	**WMT - Walmart Inc. - Common Stock**	Corporate Securities Stock	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.15	**FLJP - Franklin FTSE Japan ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.16	**PAVE - Global X U.S. Infrastructure Development ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.17	**GSLC - Goldman Sachs ActiveBeta(R) U.S. Large Cap Equity ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$15,001 - $50,000	None	None (or less than $201)
3.18	**QQQ - Invesco QQQ Trust, Series 1**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.19	**IJH - iShares Core S&P Mid-Cap ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.20	**IYW - iShares U.S. Technology ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$15,001 - $50,000	None	None (or less than $201)
3.21	**IYG - iShares U.S. Financial Services ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.22	**IHI - iShares U.S. Medical Devices ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.23	**EFV - iShares MSCI EAFE Value ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$15,001 - $50,000	None	None (or less than $201)
3.24	**EUFN - iShares MSCI Europe Financials ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.25	**IEFA - iShares Core MSCI EAFE ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)

3.26	**IEMG - iShares Core MSCI Emerging Markets ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.27	**EMXC - iShares MSCI Emerging Markets ex China ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.28	**BBCA - JPMorgan BetaBuilders Canada ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
3.29	**JEPI - JPMorgan Equity Premium Income ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$15,001 - $50,000	None	None (or less than $201)
3.30	**JIVE - JPMorgan International Value ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$15,001 - $50,000	None	None (or less than $201)
3.31	**SMH - VanEck Semiconductor ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$15,001 - $50,000	None	None (or less than $201)
4	**Brokerage Acct #1 - Raymond James**	Brokerage/Managed Account	Joint	--		
4.1	**AAPL - Apple Inc. - Common Stock**	Corporate Securities Stock	Joint	$1,000,001 - $5,000,000	Dividends	$2,501 - $5,000
4.2	**Raymond James Bank Deposit** (Birmingham, AL) *Type:* Brokerage Sweep Account	Bank Deposit	Joint	$1,001 - $15,000	Interest	None (or less than $201)
4.3	**FLO - Flowers Foods, Inc. Common Stock**	Corporate Securities Stock	Joint	None (or less than $1,001)	Dividends	None (or less than $201)
4.4	**SO - Southern Company**	Corporate Securities Stock	Joint	$1,001 - $15,000	Dividends	$201 - $1,000
5	**Raymond James - Self IRA**	Retirement Plans IRA	Self	--		
5.1	**AAPL - Apple Inc. - Common Stock**	Corporate Securities Stock	Self	$100,001 - $250,000	None	None (or less than $201)
5.2	**BRK.B - Berkshire Hathaway Inc. New Common Stock**	Corporate Securities Stock	Self	$15,001 - $50,000	None	None (or less than $201)
5.3	**FNSXX - FIMM Money Market Port Instl Cl M/M**	Mutual Funds Mutual Fund	Self	None (or less than $1,001)	None	None (or less than $201)
5.4	**Raymond James** (Montgomery, AL) *Type:* Brokerage Sweep Account	Bank Deposit	Self	$1,001 - $15,000	None	None (or less than $201)
5.5	**PAVE - Global X U.S. Infrastructure Development ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.6	**FLJP - Franklin FTSE Japan ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.7	**GSLC - Goldman Sachs ActiveBeta(R) U.S. Large Cap Equity ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$15,001 - $50,000	None	None (or less than $201)
5.8	**QQQ - Invesco QQQ Trust, Series 1**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.9	**QQQM - Invesco NASDAQ 100 ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.10	**IJH - iShares Core S&P Mid-Cap ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.11	**IYW - iShares U.S. Technology ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$15,001 - $50,000	None	None (or less than $201)
5.12	**IYG - iShares U.S. Financial Services ETF**	Mutual Funds	Self	$1,001 -	None	None (or

		Exchange Traded Fund/Note		$15,000		less than $201)
5.13	**IHI - iShares U.S. Medical Devices ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.14	**IEO - iShares U.S. Oil & Gas Exploration & Production ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.15	**EFV - iShares MSCI EAFE Value ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$15,001 - $50,000	None	None (or less than $201)
5.16	**EUFN - iShares MSCI Europe Financials ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.17	**IEFA - iShares Core MSCI EAFE ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.18	**IEMG - iShares Core MSCI Emerging Markets ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.19	**EMXC - iShares MSCI Emerging Markets ex China ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.20	**BBCA - JPMorgan BetaBuilders Canada ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.21	**JEPI - JPMorgan Equity Premium Income ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.22	**JIVE - JPMorgan International Value ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.23	**XLY - The Consumer Discretionary Select Sector SPDR Fund**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
5.24	**SMH - VanEck Semiconductor ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
6	**Brokerage Acct #2 - Edward Jones**	Brokerage/Managed Account	Spouse	--		
6.1	**Edward Jones Bank Deposit** (Maryland Heights, MO) *Type:* Brokerage Sweep Account	Bank Deposit	Spouse	$1,001 - $15,000	Interest	None (or less than $201)
7	**NFL Player Second Career Savings Plan 401(k)**	Retirement Plans 401(k), 403(b), or other Defined Contribution Plan.	Spouse	--		
7.1	**SSCQX - State Street Target Retirement 2040 Fund Class K**	Mutual Funds Mutual Fund	Spouse	$100,001 - $250,000	None	None (or less than $201)
7.2	**US Large Company Equity Fund**	Mutual Funds Mutual Fund	Spouse	$250,001 - $500,000	None	None (or less than $201)
8	**Virginia529 College Savings Plan - Child 2** *Institution:* Virginia	Education Savings Plans 529 College Savings Plan	Self	--		
8.1	**CFAEX - The Bond Fund of America Class 529-E Shares**	Mutual Funds Mutual Fund	Self	$1,001 - $15,000	None	None (or less than $201)
8.2	**CICEX - The Investment Company of America Class 529-E S**	Mutual Funds Mutual Fund	Self	$50,001 - $100,000	None	None (or less than $201)
8.3	**CNPEX - New Perspective Fund Class 529-E Shares**	Mutual Funds Mutual Fund	Self	$50,001 - $100,000	None	None (or less than $201)
9	**Fidelity Advisor 529 Plan - Child 1** *Institution:* New Hampshire	Education Savings Plans 529 College Savings Plan	Spouse	--		

9.1	**FACAX - Fidelity Advisor 529 College Portfolio - Class A**	Mutual Funds Mutual Fund	Spouse	$50,001 - $100,000	None	None (or less than $201)
10	**SO - Southern Company (The) Common Stock**	Corporate Securities Stock	Self	$15,001 - $50,000	Dividends	$201 - $1,000
11	**Bert Bell/Pete Rozelle NFL Player Retirement Plan**	Retirement Plans Defined Benefit Pension Plan	Spouse	Unascertainable	None	None (or less than $201)
12	**Southern Company Pension Plan**	Retirement Plans Defined Benefit Pension Plan	Spouse	Unascertainable	None	None (or less than $201)
13	**NFL Player Annuity Program**	Deferred Compensation Deferred Compensation - Other	Spouse	--		
13.1	**NFL Player Annuity Program - PSM** *Description*: Financial & Investment Program (Harrisburg, PA)	Other	Spouse	$100,001 - $250,000	None	None (or less than $201)
14	**Regions Bank** (Birmingham, AL) *Type:* Checking	Bank Deposit	Joint	$15,001 - $50,000	Interest	None (or less than $201)
15	**APCO Empl Credit Union** (Birmingham, AL) *Type:* Checking, Savings	Bank Deposit	Spouse	$1,001 - $15,000	Interest	None (or less than $201)
16	**Gene Upshaw NFL Player Health Reimbursement Account Plan**	Retirement Plans Defined Benefit Pension Plan	Spouse	$15,001 - $50,000	None	None (or less than $201)
17	**Britt4Properties LLC** *Company:* Britt4Properties LLC (Enterprise, AL) *Description:* Holding Company	Business Entity Limited Liability Company (LLC)	Spouse	--		
17.1	**2f4b LLC** *Company:* 2f4b LLC (Enterprise, AL) *Description:* Real Estate Development	Business Entity Limited Liability Company (LLC)	Spouse	$1,001 - $15,000	None	None (or less than $201)
18	**2f4b INV LLC** *Company:* 2f4b INV LLC (Enterprise, AL) *Description:* Real Estate Development	Business Entity Limited Liability Company (LLC)	Spouse	--		
18.1	**Commercial Real Estate** *Description:* Land in Development (Enterprise, AL)	Real Estate Commercial	Spouse	$500,001 - $1,000,000	None	None (or less than $201)
19	**Bennington Investments, LLC** *Company:* Bennington Investments, LLC (Enterprise, AL) *Description:* Real Estate Development	Business Entity Limited Liability Company (LLC)	Spouse	--		
19.1	**Commercial Real Estate** *Description:* Land in Development (Enterprise, AL)	Real Estate Commercial	Spouse	$250,001 - $500,000	None	None (or less than $201)
20	**Bennington Group, LLC** *Company:* Bennington Group, LLC (Enterprise, AL) *Description:* Real Estate Development	Business Entity Limited Liability Company (LLC)	Spouse	--		
20.1	**Commercial Real Estate** *Description:* Land in Development (Enterprise, AL)	Real Estate Commercial	Spouse	$100,001 - $250,000	None	None (or less than $201)
21	**Vanguard Butler Snow Retirement Savings Plan**	Retirement Plans 401(k), 403(b), or other Defined Contribution Plan.	Self	--		
21.1	**VTIVX - Vanguard Target Retirement 2045 Fund**	Mutual Funds Mutual Fund	Self	$15,001 - $50,000	None	None (or less than $201)
22	**Raymond James - Spouse Roth IRA**	Brokerage/Managed Account	Spouse	--		
22.1	**GSLC - Goldman Sachs ActiveBeta U.S. Large Cap Equity ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.2	**QQQM - Invesco NASDAQ 100 ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.3	**IYW - iShares U.S. Technology ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.4	**IYG - US Financial Services Ishares ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)

22.5	**EFV - iShares MSCI EAFE Value ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.6	**IGLB - iShares 10 Year Investment Grade Corporate Bond E**	Mutual Funds Exchange Traded Fund/Note	Spouse	None (or less than $1,001)	None	None (or less than $201)
22.7	**IEFA - iShares Core MSCI EAFE ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.8	**IEMG - iShares Core MSCI Emerging Markets ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.9	**JEPI - JPMorgan Equity Premium Income ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.10	**HDUS - Lattice Strategies Trust Hartford Disciplined US E**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.11	**QQQM - Invesco NASDAQ 100 ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.12	**IVV - iShares Core S&P 500 ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.13	**IJR - iShares Core S&P Small-Cap**	Mutual Funds Exchange Traded Fund/Note	Spouse	None (or less than $1,001)	None	None (or less than $201)
22.14	**EMXC - Emrg Mkts Ex China Ishares MSCI ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.15	**XLE - SPDR Select Sector Fund - Energy Select Sector**	Mutual Funds Exchange Traded Fund/Note	Spouse	None (or less than $1,001)	None	None (or less than $201)
22.16	**PAVE - Global X U.S. Infrastructure Development ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.17	**JPST - JPMorgan Ultra-Short Income ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
22.18	**JIVE - JPMorgan International Value ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$1,001 - $15,000	None	None (or less than $201)
23	**Raymond James - Self Roth IRA**	Brokerage/Managed Account	Self	--		
23.1	**Raymond James Bank Deposit** (Birmingham, AL) *Type:* Brokerage Sweep Account	Bank Deposit	Self	$1,001 - $15,000	Interest	None (or less than $201)
23.2	**GSLC - GS Activebeta US Largecap ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.3	**QQQM - Invesco NASDAQ 100 ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.4	**IYW - iShares U.S. Technology ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.5	**IYG - iShares U.S. Financial Services ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.6	**EFV - iShares MSCI EAFE Value ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.7	**IGLB - iShares 10 Year Investment Grade Corporate Bond E**	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than $1,001)	None	None (or less than $201)
23.8	**IEFA - iShares Core MSCI EAFE ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than

						$201)
23.9	**IEMG - iShares Core MSCI Emerging Markets ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.10	**BBCA - JPMorgan BetaBuilders Canada ETF**	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than $1,001)	None	None (or less than $201)
23.11	**JEPI - JPMorgan Equity Premium Income ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.12	**MOTI - VanEck Morningstar International Moat ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.13	**HDUS - Lattice Strategies Trust Hartford Disciplined US E**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.14	**PAVE - Global X U.S. Infrastructure Development ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.15	**QQQ - Invesco QQQ Trust, Series 1**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.16	**IVV - iShares Core S&P 500**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.17	**IJR - iShares Core S&P Small-Cap**	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than $1,001)	None	None (or less than $201)
23.18	**EMXC - Emrg Mkts Ex China Ishares MSCI ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.19	**JPMB - JPM USD Emrg Mkts Sovereign Bond ETF**	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than $1,001)	None	None (or less than $201)
23.20	**XLE - SPDR Select Sector Fund - Energy Select Sector**	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than $1,001)	None	None (or less than $201)
23.21	**JPST - JPMorgan Ultra-Short Income ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.22	**JIVE - JPMorgan International Value ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
23.23	**EUFN - iShares MSCI Europe Financials ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$1,001 - $15,000	None	None (or less than $201)
24	**Goldman Sachs / Apple** (Philadelphia, PA) *Type:* Savings	Bank Deposit	Spouse	$1,001 - $15,000	Interest	$201 - $1,000

25	**Mack Bayou Townhomes Holdings, LLC** *Company:* Mack Bayou Townhomes Holdings, LLC (Daphne, AL) *Description:* Investment and development of residential property in Florida	Business Entity Limited Liability Company (LLC)	Spouse	--		
25.1	**Townhome Units** *Description:* Duplex (Santa Rosa Beach, FL) *Filer comment:* CONFIRM VALUE, INCOME AND ANY SALES OR ACQUISITIONS	Real Estate Residential	Spouse	$100,001 - $250,000	None	None (or less than $201)
26	**181 - Fairhope Ave 2023, LLC** *Company:* 181 Fairhope Ave 2023, LLC (Daphne, AL) *Description:* Investment and development of real property in Alabama	Business Entity Limited Liability Company (LLC)	Spouse	--		
26.1	**Land** *Description:* Undeveloped land in Alabama (Fairhope, AL) *Filer comment:* CONFIRM VALUE AND ANY ACQUISITIONS OR SALES	Real Estate Unimproved Land	Spouse	$15,001 - $50,000	None	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.

#	Transaction Date	Owner	Ticker	Asset Name	Type	Amount	Comment
1	04/14/2025	Spouse	XOM	Exxon Mobil Corp	Purchase	$1,001 - $15,000	--
2	04/14/2025	Spouse	JPM	JP Morgan Chase & Company	Purchase	$1,001 - $15,000	--
3	04/14/2025	Spouse	GOOG	Alphabet Cl C	Purchase	$1,001 - $15,000	--
4	04/14/2025	Spouse	EOG	EOG Resources, Inc. Common Stock	Purchase	$1,001 - $15,000	--
5	04/14/2025	Spouse	AAPL	Apple Inc	Purchase	$1,001 - $15,000	--
6	04/14/2025	Spouse	AMZN	Amazon.com Inc	Purchase	$1,001 - $15,000	--
7	04/14/2025	Spouse	WMT	Walmart Inc	Purchase	$1,001 - $15,000	--
8	04/14/2025	Spouse	V	Visa Inc	Purchase	$1,001 - $15,000	--
9	04/14/2025	Spouse	MSFT	Microsoft Corp	Purchase	$1,001 - $15,000	--
10	04/14/2025	Spouse	UNH	Unitedhealth Group Inc	Purchase	$1,001 - $15,000	--
11	04/14/2025	Spouse	NVDA	Nvidia Corp	Purchase	$1,001 - $15,000	--
12	04/30/2025	Spouse	AMZN	Amazon.com Inc	Purchase	$1,001 - $15,000	--
13	04/30/2025	Spouse	AAPL	Apple Inc	Purchase	$1,001 - $15,000	--
14	04/30/2025	Spouse	NVDA	Nvidia Corp	Purchase	$1,001 - $15,000	--
15	04/30/2025	Spouse	XOM	Exxon Mobil Corp	Sale (Full)	$1,001 - $15,000	--
16	04/30/2025	Spouse	UNH	Unitedhealth Group Inc	Sale (Full)	$1,001 - $15,000	--
17	11/07/2025	Spouse	GOOG	Alphabet Cl C	Sale (Partial)	$1,001 - $15,000	--
18	11/07/2025	Spouse	AAPL	Apple Inc	Sale (Partial)	$1,001 - $15,000	--
19	11/07/2025	Spouse	AMZN	Amazon.com Inc	Sale (Partial)	$1,001 - $15,000	--
20	11/07/2025	Spouse	NVDA	Nvidia Corp	Sale (Partial)	$1,001 - $15,000	--
21	11/07/2025	Spouse	UPS	United Parcel Service	Purchase	$1,001 - $15,000	--
22	11/07/2025	Spouse	V	Visa Inc	Purchase	$1,001 - $15,000	--

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	Spouse	FNSXX	Money Market Portfolio - Institutional Class	Sale (Full)	04/14/2025	$100,001 - $250,000	n/a
2	Spouse	JEPQ	JPMorgan Nasdaq Equity Premium Income ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
3	Spouse	HDUS	Hartford Disciplined US Equity ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
4	Spouse	JEPI	JPMorgan Equity Premium Income ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
5	Spouse	JIVE	JPMorgan International Value ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a

6	Spouse	BBCA	JPMorgan BetaBuilders Canada ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
7	Spouse	SMH	VanEck Semiconductor ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
8	Spouse	EFV	iShares MSCI EAFE Value ETF	Purchase	04/14/2025	$15,001 - $50,000	n/a
9	Spouse	EUFN	iShares MSCI Europe Financials ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
10	Spouse	IHI	iShares U.S. Medical Devices ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
11	Spouse	EMXC	iShares MSCI Emerging Markets ex China ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
12	Spouse	IYG	iShares U.S. Financial Services ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
13	Spouse	IJH	iShares Core S&P Mid-Cap ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
14	Spouse	IYW	iShares U.S. Technology ETF	Purchase	04/14/2025	$15,001 - $50,000	n/a
15	Spouse	QQQ	Invesco QQQ Trust, Series 1	Purchase	04/14/2025	$1,001 - $15,000	n/a
16	Spouse	PAVE	Global X U.S. Infrastructure Development ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
17	Spouse	GSLC	Goldman Sachs ActiveBeta(R) U.S. Large Cap Equity ETF	Purchase	04/14/2025	$15,001 - $50,000	n/a
18	Spouse	FLJP	Franklin FTSE Japan ETF	Purchase	04/14/2025	$1,001 - $15,000	n/a
19	Spouse	SMH	VanEck Semiconductor ETF	Purchase	04/30/2025	$1,001 - $15,000	n/a
20	Spouse	PAVE	Global X U.S. Infrastructure Development ETF	Purchase	04/30/2025	$1,001 - $15,000	n/a
21	Spouse	HDUS	Hartford Disciplined US Equity ETF	Sale (Full)	04/30/2025	$1,001 - $15,000	n/a
22	Spouse	JIVE	JPMorgan International Value ETF	Purchase	04/30/2025	$1,001 - $15,000	n/a
23	Spouse	BBCA	JPMorgan BetaBuilders Canada ETF	Sale (Partial)	04/30/2025	$1,001 - $15,000	n/a
24	Spouse	IEMG	iShares Core MSCI Emerging Markets ETF	Purchase	04/30/2025	$1,001 - $15,000	n/a
25	Spouse	IEFA	iShares Core MSCI EAFE ETF	Purchase	04/30/2025	$1,001 - $15,000	n/a
26	Spouse	EFV	iShares MSCI EAFE Value ETF	Purchase	04/30/2025	$1,001 - $15,000	n/a
27	Spouse	IEMG	iShares Core MSCI Emerging Markets ETF	Purchase	11/07/2025	$1,001 - $15,000	n/a
28	Spouse	JEPQ	JPMorgan Nasdaq Equity Premium Income ETF	Sale (Full)	11/07/2025	$1,001 - $15,000	n/a
29	Spouse	SMH	VanEck Semiconductor ETF	Purchase	11/07/2025	$1,001 - $15,000	n/a
30	Spouse	JEPI	JPMorgan Equity Premium Income ETF	Purchase	11/07/2025	$1,001 - $15,000	n/a
31	Self	FLJP	Franklin FTSE Japan ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
32	Self	PAVE	Global X U.S. Infrastructure Development ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
33	Self	GSLC	Goldman Sachs ActiveBeta(R) U.S. Large Cap Equity ETF	Purchase	04/11/2025	$15,001 - $50,000	n/a
34	Self	QQQM	Invesco NASDAQ 100 ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
35	Self	IJH	iShares Core S&P Mid-Cap ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
36	Self	IYW	iShares U.S. Technology ETF	Purchase	04/11/2025	$15,001 - $50,000	n/a
37	Self	IYG	iShares U.S. Financial Services ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
38	Self	IHI	iShares U.S. Medical Devices ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
39	Self	IEO	iShares U.S. Oil & Gas Exploration & Production ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
40	Self	EFV	iShares MSCI EAFE Value ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
41	Self	EUFN	iShares MSCI Europe Financials ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
42	Self	EMXC	iShares MSCI Emerging Markets ex China ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
43	Self	BBCA	JPMorgan BetaBuilders Canada ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a

44	Self	--	JEPI - JPMorgan Equity Premium Income ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
45	Self	HDUS	Hartford Disciplined US Equity ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
46	Self	--	XLV - The Health Care Select Sector SPDR Fund	Purchase	04/11/2025	$1,001 - $15,000	n/a
47	Self	XLE	The Energy Select Sector SPDR Fund	Purchase	04/11/2025	$1,001 - $15,000	n/a
48	Self	SMH	VanEck Semiconductor ETF	Purchase	04/11/2025	$1,001 - $15,000	n/a
49	Self	QQQ	Invesco QQQ Trust, Series 1	Purchase	04/11/2025	$1,001 - $15,000	n/a
50	Self	FNSXX	Money Market Portfolio - Institutional Class	Sale (Full)	04/11/2025	$100,001 - $250,000	n/a
51	Self	QQQM	Invesco NASDAQ 100 ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
52	Self	EFV	iShares MSCI EAFE Value ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
53	Self	IEFA	iShares Core MSCI EAFE ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
54	Self	JIVE	JPMorgan International Value ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
55	Self	XLV	The Health Care Select Sector SPDR Fund	Sale (Full)	05/01/2025	$1,001 - $15,000	n/a
56	Self	HDUS	Hartford Disciplined US Equity ETF	Sale (Full)	05/01/2025	$1,001 - $15,000	n/a
57	Self	IEMG	iShares Core MSCI Emerging Markets ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
58	Self	XLE	The Energy Select Sector SPDR Fund	Sale (Full)	05/01/2025	$1,001 - $15,000	n/a
59	Self	SMH	VanEck Semiconductor ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
60	Self	BBCA	JPMorgan BetaBuilders Canada ETF	Sale (Partial)	05/01/2025	$1,001 - $15,000	n/a
61	Self	IYW	iShares U.S. Technology ETF	Sale (Partial)	11/10/2025	$1,001 - $15,000	n/a
62	Self	IEMG	iShares Core MSCI Emerging Markets ETF	Purchase	11/10/2025	$1,001 - $15,000	n/a
63	Self	JEPI	JPMorgan Equity Premium Income ETF	Purchase	11/10/2025	$1,001 - $15,000	n/a
64	Self	JEPQ	JPMorgan Nasdaq Equity Premium Income ETF	Sale (Full)	11/10/2025	$1,001 - $15,000	n/a
65	Spouse	IJR	iShares Core S&P Small-Cap ETF	Sale (Full)	04/08/2025	$1,001 - $15,000	n/a
66	Spouse	XLE	The Energy Select Sector SPDR Fund	Sale (Full)	04/08/2025	$1,001 - $15,000	n/a
67	Spouse	IGLB	iShares 10+ Year Investment Grade Corporate Bond ETF	Sale (Full)	04/08/2025	$1,001 - $15,000	n/a
68	Spouse	QQQM	Invesco NASDAQ 100 ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
69	Spouse	SHYG	iShares 0-5 Year High Yield Corporate Bond ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
70	Spouse	JPST	JPMorgan Ultra-Short Income ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
71	Spouse	JIVE	JPMorgan International Value ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
72	Spouse	IYW	iShares U.S. Technology ETF	Sale (Partial)	11/10/2025	$1,001 - $15,000	n/a
73	Spouse	SHYG	iShares 0-5 Year High Yield Corporate Bond ETF	Sale (Full)	11/10/2025	$1,001 - $15,000	n/a
74	Spouse	JPST	JPMorgan Ultra-Short Income ETF	Purchase	11/10/2025	$1,001 - $15,000	n/a
75	Self	IJR	iShares Core S&P Small-Cap ETF	Sale (Full)	04/08/2025	$1,001 - $15,000	n/a
76	Self	IGLB	iShares 10+ Year Investment Grade Corporate Bond ETF	Sale (Full)	04/08/2025	$1,001 - $15,000	n/a
77	Self	XLE	The Energy Select Sector SPDR Fund	Sale (Full)	04/08/2025	$1,001 - $15,000	n/a
78	Self	JPMB	JPMorgan USD Emerging Markets Sovereign Bond ETF	Sale (Full)	04/08/2025	$1,001 - $15,000	n/a
79	Self	QQQM	Invesco NASDAQ 100 ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
80	Self	SHYG	iShares 0-5 Year High Yield Corporate Bond ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a

81	Self	JIVE	JPMorgan International Value ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
82	Self	IEFA	iShares Core MSCI EAFE ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
83	Self	JPST	JPMorgan Ultra-Short Income ETF	Purchase	05/01/2025	$1,001 - $15,000	n/a
84	Self	IYW	iShares U.S. Technology ETF	Sale (Partial)	11/10/2025	$1,001 - $15,000	n/a
85	Self	SHYG	iShares 0-5 Year High Yield Corporate Bond ETF	Sale (Full)	11/10/2025	$1,001 - $15,000	n/a
86	Self	JPST	JPMorgan Ultra-Short Income ETF	Purchase	11/10/2025	$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	2024	Spouse	Line of Credit	-	prime-.75% (2 years)	$250,001 - $500,000	Max Credit Union Montgomery, AL	Draw down line of credit for 2F4B, LLC.
2	2020	Joint	Mortgage	0	2.625% (318 months)	$250,001 - $500,000	Regions Mortgage Montgomery, AL	n/a
3	2024	Spouse	Line of Credit	-	6.75% (2 years)	$100,001 - $250,000	All in Credit Union Montgomery, AL	Draw down line of credit for Bennington Investments, LLC

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	Oct 2022	Butler Snow LLP Montgomery, AL	Other (Continuing participation in an employee benefit plan)	Continuing participation in an employee benefit plan (no additional contributions to plan)	n/a
2	Jan 2023	Grand Central Publishing, Hachette Book Group, Inc. New York, NY	Royalty Agreement	Agreement to receive book advance and royalty payments based on usual and customary terms. Income from this agreement is disclosed in Section 2.	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.