

Annual Report for Calendar 2025

The Honorable Thomas R Tillis (Tillis, Thom)

📁 Filed 08/12/2026 @ 5:27 AM

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	Allent Tate Realtors Davidson, NC	> \$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	Own-er	Value	Income Type	Income
1	Huntersville Residence <i>Description:</i> Primary Residence	Real Estate Residential	Joint	\$1,000,001 - \$5,000,000	None	None (or less than \$201)

- House
(Huntersville, NC)

2	IBM - International Business Machines Corporation Common	Corporate Securities Stock	Self	\$100,001 - \$250,000	None	None (or less than \$201)
3	Wells Fargo - Banking/Checking (Cornelius, NC) <i>Type: Checking</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Interest	\$201 - \$1,000
4	Morgan Stanley Brokerage Account X066	Brokerage/Managed Account	Joint	--		
4.1	Morgan Stanley cash account (Cornelius, NC) <i>Type: Checking, Money Market Account</i>	Bank Deposit	Joint	\$15,001 - \$50,000	Interest	None (or less than \$201)
4.2	IXN - iShares Global Tech ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends	\$201 - \$1,000
4.3	IWD - iShares Russell 1000 Value ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000
4.4	IWM - iShares Russell 2000 ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500
4.5	DODFX - Dodge & Cox International Stock Fund	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500
4.6	HNACX - Harbor Capital Appreciation Fund - Retirement CI	Mutual Funds Mutual Fund	Joint	\$250,001 - \$500,000	None	None (or less than \$201)
4.7	PMAQX - Principal Funds Inc. - Midcap Fund Class R6	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Dividends	None (or less than \$201)
4.8	PONPX - Pimco Income Fund Class I-2	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Capital Gains	\$5,001 - \$15,000
5	Morgan Stanley IRA Account x065	Brokerage/Managed Account	Joint	--		
5.1	Morgan Stanley (Cornelius, NC)	Bank Deposit	Joint	\$15,001 - \$50,000	None	None (or less than \$201)

Type: Money
Market Account

5.2	IEMG - iShares Core MSCI Emerging Markets ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000
5.3	IWE - iShares Russell 1000 Growth ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500
5.4	ABNFX - The Bond Fd of America Class F-2 Shares	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Capital Gains	\$5,001 - \$15,000
5.5	MAHQX - Blackrock Total Return Fund Class I	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Capital Gains	\$5,001 - \$15,000
5.6	CIVIX - Causeway International Value Fund - Institutiona	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Interest, Capital Gains	\$1,001 - \$2,500
5.7	GSIMX - Goldman Sachs Gqg Partners International Opportu	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Dividends, Capital Gains	\$1,001 - \$2,500
5.8	GQGIX - Gqg Partners Emerging Markets Equity Fund Instit	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Dividends, Capital Gains	\$1,001 - \$2,500
5.9	HDGIX - The Hartford Dividend & Growth Fund Class I	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Capital Gains	\$2,501 - \$5,000
5.10	OANMX - Oakmark Fund Institutional Class	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Dividends, Capital Gains	\$201 - \$1,000
5.11	IWD - Russell 1000 Value Ishares ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends, Capital Gains	\$1,001 - \$2,500
5.12	IEFA - iShares Core MSCI EAFE ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000
5.13	IVV - iShares Core S&P 500	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends, Capital Gains	\$1,001 - \$2,500
5.14	IWP - iShares Russell Midcap	Mutual Funds Exchange Traded Fund/Note	Joint	\$50,001 - \$100,000	Dividends, Capital Gains	\$201 - \$1,000

Growth ETF

5.15	<u>FBND</u> - Fidelity Total Bond ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends, Capital Gains	\$5,001 - \$15,000
5.16	<u>CGGR</u> - Capital Group Growth ETF - Share class	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends, Interest	None (or less than \$201)
5.17	<u>WFMIX</u> - Allspring Special Mid Cap Value Fund - Institutional Class	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Dividends, Capital Gains	\$201 - \$1,000
5.18	<u>PFTPX</u> - PIMCO Low Duration Income Fund - I-2	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Dividends, Capital Gains	\$2,501 - \$5,000
6	IBM Defined Benefit Plan	Retirement Plans Defined Benefit Pension Plan	Joint	\$50,001 - \$100,000	None	None (or less than \$201)
7	NC State Employees Pension Plan	Retirement Plans Defined Benefit Pension Plan	Self	\$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.

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	Joint	--	Real Estate - Primary Residence	Purchase	03/28/2025	\$1,000,001 - \$5,000,000	n/a
2	Joint	<u>CGGR</u>	Capital Group Growth ETF - Share class	Purchase	10/17/2025	\$50,001 - \$100,000	n/a
3	Joint	<u>IWE</u>	iShares Russell 1000 Growth ETF	Purchase	04/07/2025	\$1,001 - \$15,000	n/a
4	Joint	<u>IWE</u>	iShares Russell 1000	Purchase	04/16/2025	\$15,001 - \$50,000	n/a

Growth ETF

5	Joint	<u>IWD</u>	iShares Russell 1000 Value ETF	Purchase	10/17/2025	\$1,001 - \$15,000	n/a
6	Joint	<u>WFMIX</u>	Allspring Special Mid Cap Value Fund - Institutional Class	Purchase	02/14/2025	\$15,001 - \$50,000	n/a
7	Joint	<u>HDGIX</u>	THE HARTFORD DIVIDEND AND GROWTH FUND - Class I	Purchase	10/17/2025	\$15,001 - \$50,000	n/a
8	Joint	<u>OANMX</u>	Oakmark Fund - Institutional Class	Purchase	10/17/2025	\$1,001 - \$15,000	n/a
9	Joint	<u>PFTPX</u>	PIMCO Low Duration Income Fund - I-2	Purchase	04/16/2025	\$50,001 - \$100,000	n/a
10	Joint	<u>GSIMX</u>	Goldman Sachs GQG Partners International Opportunities Fund - Institutional Shares	Purchase	10/15/2025	\$1,001 - \$15,000	n/a
11	Joint	<u>EGFIX</u>	EDGEWOOD GROWTH FUND - Institutional Class Shares	Sale (Full)	10/17/2025	\$50,001 - \$100,000	n/a
12	Joint	<u>NMVLX</u>	Nuance Mid Cap Value Fund - Institutional Class	Sale (Full)	04/17/2025	\$15,001 - \$50,000	n/a
13	Joint	--	DC CONDO	Sale (Full)	12/15/2025	\$250,001 - \$500,000	n/a
14	Joint	--	Nashville CONDO	Sale (Full)	09/14/2025	\$100,001 - \$250,000	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**

#	In-curred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2005	Joint	Home Equity Line of Credit	-	2.75% (30 years)	\$100,001 - \$250,000	Wells Fargo Cornelius, NC	n/a
2	2005	Joint	Mortgage	0	3.5% (30 years)	\$100,001 - \$250,000	Wells Fargo Cornelius, NC	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 In-volved	Type	Status and Terms	Comments
1	Jan 2007	North Carolina General Assembly Raleigh, NC	Continuing participation in an employee benefit plan	Employee retirement benefit plan. Eligible upon retirement.	n/a
2	Oct 2002	IBM Armonk, NY	Continuing participation in an employee	IBM defined benefit plan.	n/a

benefit plan					
3	Jan 2012	North Carolina General Assembly Raleigh, NC	Other (Healthcare Benefits)	Eligible for state employee health plan after age 60.	n/a
4	May 2026	HarperCollins Publishers LLC New York, New York	Royalty Agreement	The "Status and Terms" of the agreement with HarperCollins Publishers LLC: Publishing contract for nonfiction book entitled, How to Lose Friends and Antagonize Presidents. Contract provides for royalty payments, including an advance on royalty payments. Contract terms are usual and customary in the publishing trade. No income was received from the contract in 2025.	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.