

Katherine G. Leonard
FINANCIAL DISCLOSURE 2025

Item 5 (financial range code in parentheses)

Mutual Funds, ETFs, Hedge Fund

ANWFX (G), WMFFX (H), SOXQ (C), RSP (G), ITOT (E), IUSG (E),
JMGRX (B), SEEGX (I), COWZ (E), VXF (D), VNQ (B), VOT (E), EES
(D), IVV (B), QQQ (C), RSPT (C), VIG (F), VOE (D), VOO (C), FDYZX
(F), OGGFX (D), TRBCX (E), VBK (D), VTV (C), VTI (B), XLK (B),
IWF (E), IWD (C), BLACKSTONE REAL ESTATE INVESTMENT TRUST (D),
CAPITAL GROUP EUROPACIFIC GROWTH (G), HARBOR SMALL CAP VALUE (G),
BLACKROCK US SMALL/MID CAP (G), BLACKROCK US LARGE CAP INDEX (H),
VANGUARD WELLINGTON ADM (G), STABLE VALUE FUND (B)

STOCKS, LP

NVDA (G), AVGO (F), AMZN (F), GOOGL (E), MELI (E), TSM (E), LRCX
(E), URI (E), CDNS (E), PLTR (E), RTX (E), AAPL (E), MSFT (E),
XOM (D), LLY (D), NFLX (D), JPM (D), CRM (D), WMB (D), UNP (D),
BLK (D), COF (D), ET (D), BKNG (D), AZN (D), VRT (D), C (D), IBM
(D), VLO (D), LMT (D), GLW (D), ABBNY (D), CVX (C), CSCO (C), KO
(C), QCOM (C), VRTX (C), ANET (C), ABT (C), TSLA (C), AMD (C),
HSBC (C), MPC (C), AIG (C), APP (C), NOW (C), CMI (C), PLD (C),
GS (C), ON (C), MRK (C), WMT (C), MS (C), KR (C), ORCL (C), MRVL
(C), IBKR (C), RIO (C), V (C), SPOT (C), AMGN (C), KMI (C), MET
(C), MAS (C), ZTS (C), KLAC (C), OHI (C), META (C), NOC (C), TMO
(C), ELAN (C), OC (C), SNY (C), ENB (C), AVY (C), TSCO (C), TFC
(C), MCD (C), CME (C), DELL (C), CARR (C), PG (B), OLN (B), BX
(B), PEP (B), GPK (B), DLR (B), ABBV (B), BAESF (B), XYZ (B),
AMCR (B), SMC (B), OTIS (B), SNPS (B)

Item 6 (sold stocks, mutual funds, ETFs) (financial code range in parentheses)

ABBV (C), ADBE (C), APD (B), ALB (B), ESPNX (C), GOOG (G), AMZN (C), AMT (C), WMFFX (F), AAPL (C), AMAT (C), ASML (C), T (C), BDX (B), BHP (C), BMRN (B), AVGO (E), GTLS (C), CB (C), C (C), GSFTX (F), CMCSA (B), STZ (C), GLW (B), CRSP (B), CSX (C), CW (C), DTGHF (B), DRI (C), DAL (C), DEO (B), EMN (B), EMR (B), EQIX (C), FDX (C), FIS (C), FDYZX (E), GD (C), HD (D), HON (D), HBAN (C), ICE (C), RSP (F), IVE (E), JMGRX (E), JEPI (C), KVUE (C), KDP (B), KLAC (C), DCCIX (E), MA (B), MCD (B), MRK (C), MU (C), MSFT (C), NUE (C), NVDA (H), COWZ (B), PLTR (C), PH (C), PSX (C), NOBL (E), SNY (B), SW (C), KRE (C), SPY (F), STWD (B), TRBCX (F), TTWO (C), XLK (B), TMO (C), TSCO (C), UHN (B), VALE (B), VIG (F), VUG (F), VOE (C), VBK (C), VBR (B), VTV (E), VRT (C), WFC (C), WMB (C)