



Filing ID #10071624

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Rebecca Bennett
Status: Congressional Candidate
State/District: NJ07

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2025
Filing Date: 07/23/2025
Period Covered: 01/01/2024– 05/05/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|----------------------|--------------------------|-------------------------------|-----------------------|
| Capital One Savings Account [BA] | | \$50,001 - \$100,000 | Interest | \$201 - \$1,000 | \$1,001 - \$2,500 |
| 529 Plan ⇒ 529 Plan [5F] | | \$15,001 - \$50,000 | Dividends, Interest | \$201 - \$1,000 | \$1,001 - \$2,500 |
| LOCATION: VA | | | | | |
| IRA 1 ⇒ AbbVie Inc. Common Stock (ABBV) [ST] | None | | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| IRA 1 ⇒ Agnico Eagle Mines Limited Common Stock (AEM) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST] | None | | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |
| IRA 1 ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST] | None | | Capital Gains | \$1 - \$200 | None |
| IRA 1 ⇒ Amphenol Corporation Common Stock (APH) [ST] | None | | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|--------------------|--------------------------|-------------------------------|-----------------------|
| IRA 1 ⇒ Apple Inc. - Common Stock (AAPL) [ST] | None | | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |
| IRA 1 ⇒ BlackRock Liquidity Funds FedFund - Premier (BUPXX) [MF] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| IRA 1 ⇒ BlackRock, Inc. Common Stock (BLK) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Boston Scientific Corporation Common Stock (BSX) [ST] | None | | Capital Gains | \$1,001 - \$2,500 | None |
| IRA 1 ⇒ Broadcom Inc. - Common Stock (AVGO) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Cencora, Inc. Common Stock (COR) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ ConocoPhillips Common Stock (COP) [ST] | None | | Dividends | None | \$1 - \$200 |
| IRA 1 ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST] | None | | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |
| IRA 1 ⇒ Eli Lilly and Company Common Stock (LLY) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Entergy Corporation Common Stock (ETR) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST] | None | | Dividends | None | \$1 - \$200 |
| IRA 1 ⇒ Ferrari N.V. Common Shares (RACE) [ST] | None | | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| IRA 1 ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| IRA 1 ⇒ | | \$1,001 - \$15,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|--------------------|--------------------------|-------------------------------|-----------------------|
| First Trust Cloud Computing ETF (SKYY) [EF] | | | | | |
| IRA 1 ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| IRA 1 ⇒ Hilton Worldwide Holdings Inc. Common Stock (HLT) [ST] | | None | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Home Depot, Inc. (HD) [ST] | | None | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Honeywell International Inc. (HON) [ST] | | None | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Howmet Aerospace Inc. Common Stock (HWM) [ST] | | None | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |
| IRA 1 ⇒ Intercontinental Exchange Inc. Common Stock (ICE) [ST] | | None | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Invesco Aerospace & Defense ETF (PPA) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| IRA 1 ⇒ Invesco KBW Bank ETF (KBWB) [EF] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | None |
| IRA 1 ⇒ iShares Biotechnology ETF (IBB) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| IRA 1 ⇒ iShares U.S. Home Construction ETF (ITB) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| IRA 1 ⇒ iShares U.S. Infrastructure ETF (IFRA) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| IRA 1 ⇒ Johnson Controls International plc Ordinary Share (JCI) [ST] | | None | Dividends | \$1 - \$200 | \$1 - \$200 |
| IRA 1 ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST] | | None | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|--------------|-----------------------|--------------------------|--------------------------------------|------------------------------|
| IRA 1 ⇒ Kenvue Inc. Common Stock (KVUE) [ST] | | None | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| IRA 1 ⇒ Live Nation Entertainment, Inc. Common Stock (LYV) [ST] | | None | None | | |
| IRA 1 ⇒ Martin Marietta Materials, Inc. Common Stock (MLM) [ST] | | None | Capital Gains, Dividends | None | \$1 - \$200 |
| IRA 1 ⇒ Materials Select Sector SPDR (XLB) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| IRA 1 ⇒ McDonald's Corporation Common Stock (MCD) [ST] | | None | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST] | | None | Dividends | None | \$1 - \$200 |
| IRA 1 ⇒ Netflix, Inc. - Common Stock (NFLX) [ST] | | None | Capital Gains | \$201 - \$1,000 | None |
| IRA 1 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST] | | None | Capital Gains, Dividends | \$2,501 - \$5,000 | \$1 - \$200 |
| IRA 1 ⇒ Pacer Data & Infrastructure Real Estate ETF (SRVR) [EF] | | \$1 - \$1,000 | Dividends | \$1 - \$200 | None |
| IRA 1 ⇒ Palo Alto Networks, Inc. (PANW) [ST] | | None | Capital Gains | \$201 - \$1,000 | None |
| IRA 1 ⇒ Parker-Hannifin Corporation Common Stock (PH) [ST] | | None | Capital Gains, Dividends | \$2,501 - \$5,000 | \$1 - \$200 |
| IRA 1 ⇒ Procter & Gamble Company (PG) [ST] | | None | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| IRA 1 ⇒ Progressive Corporation (PGR) [ST] | | None | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ Prologis, Inc. Common Stock (PLD) [ST] | | None | Dividends | \$1 - \$200 | \$1 - \$200 |

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| IRA 1 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| IRA 1 ⇒ Ross Stores, Inc. - Common Stock (ROST) [ST] | | None | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| IRA 1 ⇒ Schlumberger N.V. Common Stock (SLB) [ST] | | None | Dividends | \$1 - \$200 | \$1 - \$200 |
| IRA 1 ⇒ ServiceNow, Inc. Common Stock (NOW) [ST] | | None | Capital Gains | \$201 - \$1,000 | None |
| IRA 1 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | None |
| IRA 1 ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | None |
| IRA 1 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | None |
| IRA 1 ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | None |
| IRA 1 ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| IRA 1 ⇒ Tesla, Inc. - Common Stock (TSLA) [ST] | | None | Capital Gains | \$201 - \$1,000 | None |
| IRA 1 ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | None |
| IRA 1 ⇒ United Rentals, Inc. Common Stock (URI) [ST] | | None | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| IRA 1 ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST] | | None | None | | |
| IRA 1 ⇒ | | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | None |

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| VanEck Semiconductor ETF (SMH) [EF] | | | | | |
| IRA 1 ⇒ Vanguard Financials ETF (VFH) [EF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | None |
| IRA 1 ⇒ Vanguard Information Tech ETF (VGT) [EF] | | \$50,001 - \$100,000 | Dividends | \$201 - \$1,000 | None |
| IRA 1 ⇒ Verizon Communications Inc. Common Stock (VZ) [ST] | | None | None | | |
| IRA 1 ⇒ Visa Inc. (V) [ST] | | None | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |
| IRA 1 ⇒ Walmart Inc. Common Stock (WMT) [ST] | | None | Capital Gains | \$2,501 - \$5,000 | \$1 - \$200 |
| IRA 1 ⇒ Welltower Inc. Common Stock (WELL) [ST] | | None | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |
| IRA 1 ⇒ Western Digital Corporation - Common Stock (WDC) [ST] | | None | None | | |
| IRA 1 ⇒ Zoetis Inc. Class A Common Stock (ZTS) [ST] | | None | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| Merrill Lynch Investment Account ⇒ BlackRock Liquidity Funds FedFund - Premier (BUPXX) [MF] | | \$1 - \$1,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Merrill Lynch Investment Account ⇒ Invesco National AMT-Free Municipal Bond ETFo (PZA) [EF] | | \$1 - \$1,000 | Interest | \$201 - \$1,000 | \$201 - \$1,000 |
| Merrill Lynch Investment Account ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Merrill Lynch Investment Account ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Merrill Lynch Investment Account ⇒ iShares Core MSCI International Developed Markets ETF (IDEV) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |

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|--|-------|---------------------|----------------|-------------------------------|-----------------------|
| Merrill Lynch Investment Account ⇒ iShares Short-Term National Muni Bond ETF (SUB) [EF] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Merrill Lynch Investment Account ⇒ S&P Global Inc. Common Stock (SPGI) [ST] | | None | Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Merrill Lynch Investment Account ⇒ SPDR Nuveen Bloomberg Short Term Municipal Bond ETF (SHM) [EF] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Merrill Lynch Investment Account ⇒ T. Rowe Price Science and Technology Fd Inc. (PRSCX) [MF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Merrill Lynch Investment Account ⇒ VanEck ETF Trust VanEck Intermediate Muni ETF (ITM) [EF] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Merrill Lynch Investment Account ⇒ Vanguard Growth ETF (VUG) [EF] | | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Merrill Lynch Investment Account ⇒ Vanguard Small-Cap Growth ETF (VBK) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Merrill Lynch Investment Account ⇒ Vanguard Small-Cap Value ETF (VBR) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Merrill Lynch Investment Account ⇒ Vanguard Value ETF (VTW) [EF] | | \$15,001 - \$50,000 | Dividends | \$1,001 - \$2,500 | \$1,001 - \$2,500 |
| Roth 1 ⇒ BlackRock Eq Dividend I (MADVX) [MF] | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 1 ⇒ BlackRock Liquidity Funds FedFund - Premier (BUPXX) [MF] | SP | \$1 - \$1,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Roth 1 ⇒ ClearBridge Small Cap Fund Class I (LMNSX) [MF] | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 1 ⇒ Edgewood Growth Fund Insti (EGFIX) [MF] | SP | \$1,001 - \$15,000 | None | | |

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|---|-------|---------------------|-----------------------------|-------------------------------|-----------------------|
| Roth 1 ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF] | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 1 ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF] | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 1 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF] | SP | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 1 ⇒ iShares Russell 1000 Value ETF (IWD) [EF] | SP | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Roth 1 ⇒ MFS Value Fund - Class I (MEIIX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| Roth 1 ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF] | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 1 ⇒ Vanguard Russell 1000 Growth ETF (VONG) [EF] | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 2 ⇒ AbbVie Inc. Common Stock (ABBV) [ST] | None | | Capital Gains, Dividends | \$2,501 - \$5,000 | \$201 - \$1,000 |
| Roth 2 ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST] | None | | None | | |
| Roth 2 ⇒ Air Products and Chemicals, Inc. Common Stock (APD) [ST] | None | | Capital Gains, Dividends | None | \$1 - \$200 |
| Roth 2 ⇒ Automatic Data Processing, Inc. - Common Stock (ADP) [ST] | None | | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |
| Roth 2 ⇒ BlackRock Liquidity Funds FedFund - Premier (BUPXX) [MF] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Roth 2 ⇒ Broadcom Inc. - Common Stock (AVGO) [ST] | None | | Capital Gains, Dividends | \$5,001 - \$15,000 | \$1 - \$200 |
| Roth 2 ⇒ | None | | Dividends | None | \$201 - |

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| Chevron Corporation Common Stock (CVX) [ST] | | | | | \$1,000 |
| Roth 2 ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ CME Group Inc. - Class A Common Stock (CME) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Corning Incorporated Common Stock (GLW) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ DBA Sempra Common Stock (SRE) [ST] | None | | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 2 ⇒ Dell Technologies Inc. Class C Common Stock (DELL) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST] | None | | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |
| Roth 2 ⇒ Eli Lilly and Company Common Stock (LLY) [ST] | None | | Capital Gains, Dividends | \$5,001 - \$15,000 | \$1 - \$200 |
| Roth 2 ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST] | None | | Dividends | None | \$1 - \$200 |
| Roth 2 ⇒ Fastenal Company - Common Stock (FAST) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ First Trust Cloud Computing ETF (SKYY) [EF] | | \$1,001 - \$15,000 | None | | |
| Roth 2 ⇒ General Dynamics Corporation Common Stock (GD) [ST] | None | | Dividends | None | \$1 - \$200 |
| Roth 2 ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ | None | | Capital Gains, | \$201 - | \$1 - \$200 |

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| Home Depot, Inc. (HD) [ST] | | | Dividends | \$1,000 | |
| Roth 2 ⇒ HP Inc. Common Stock (HPQ) [ST] | None | | Dividends | None | \$1 - \$200 |
| Roth 2 ⇒ Illinois Tool Works Inc. Common Stock (ITW) [ST] | None | | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 2 ⇒ Invesco Aerospace & Defense ETF (PPA) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ Invesco KBW Bank ETF (KBWB) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ iShares Biotechnology ETF (IBB) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ iShares U.S. Home Construction ETF (ITB) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ iShares U.S. Infrastructure ETF (IFRA) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ Johnson & Johnson Common Stock (JNJ) [ST] | None | | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 2 ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST] | None | | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |
| Roth 2 ⇒ Keurig Dr Pepper Inc. (KDP) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Kinder Morgan, Inc. Common Stock (KMI) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Marsh & McLennan Companies, Inc. Common Stock (MMC) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ | None | | Capital Gains, | \$201 - | \$1 - \$200 |

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|---|-------|----------------|--------------------------|-------------------------------|-----------------------|
| McDonald's Corporation Common Stock (MCD) [ST] | | | Dividends | \$1,000 | |
| Roth 2 ⇒ Merck & Company, Inc. Common Stock (MRK) [ST] | None | | Dividends | None | \$201 - \$1,000 |
| Roth 2 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Mondelez International, Inc. - Class A Common Stock (MDLZ) [ST] | None | | Dividends | None | \$201 - \$1,000 |
| Roth 2 ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST] | None | | Dividends | None | \$1 - \$200 |
| Roth 2 ⇒ ONEOK, Inc. Common Stock (OKE) [ST] | None | | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 2 ⇒ Pacer Data & Infrastructure Real Estate ETF (SRVR) [EF] | | \$1 - \$1,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ Paychex, Inc. - Common Stock (PAYX) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Pepsico, Inc. (PEP) [ST] | None | | Dividends | None | \$201 - \$1,000 |
| Roth 2 ⇒ Phillips 66 Common Stock (PSX) [ST] | None | | Dividends | None | \$1 - \$200 |
| Roth 2 ⇒ PNC Financial Services Group, Inc. (PNC) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Roth 2 ⇒ PPL Corporation Common Stock (PPL) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Procter & Gamble Company (PG) [ST] | None | | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Prologis, Inc. Common Stock (PLD) [ST] | None | | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 2 ⇒ | None | | Capital Gains, | \$201 - | \$1 - \$200 |

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| QUALCOMM Incorporated - Common Stock (QCOM) [ST] | | | Dividends | \$1,000 | |
| Roth 2 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ Realty Income Corporation Common Stock (O) [ST] | | None | Capital Gains, Dividends | \$1 - \$200 | \$201 - \$1,000 |
| Roth 2 ⇒ RTX Corporation Common Stock (RTX) [ST] | | None | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | None |
| Roth 2 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ SPDR Select Sector Fund - Financial (XLF) [EF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | None |
| Roth 2 ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | None |
| Roth 2 ⇒ TE Connectivity plc Ordinary Shares (TEL) [ST] | | None | Capital Gains | \$1 - \$200 | None |
| Roth 2 ⇒ Texas Instruments Incorporated - Common Stock (TXN) [ST] | | None | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 2 ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | None |
| Roth 2 ⇒ The Hartford Insurance Group, Inc. Common Stock (HIG) [ST] | | None | Capital Gains | \$1 - \$200 | None |
| Roth 2 ⇒ The Travelers Companies, Inc. Common Stock (TRV) [ST] | | None | Capital Gains, Dividends | \$1,001 - \$2,500 | \$1 - \$200 |
| Roth 2 ⇒ Union Pacific Corporation Common Stock (UNP) [ST] | | None | Dividends | None | \$1 - \$200 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-------------------------|-----------------------------|-------------------------------|-----------------------|
| Roth 2 ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST] | | None | Capital Gains, Dividends | \$1 - \$200 | \$1 - \$200 |
| Roth 2 ⇒ VanEck Semiconductor ETF (SMH) [EF] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | None |
| Roth 2 ⇒ Vanguard Consumer Staples ETF (VDC) [EF] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | None |
| Roth 2 ⇒ Vanguard Industrials ETF (VIS) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ Vanguard Information Tech ETF (VGT) [EF] | | \$50,001 - \$100,000 | Dividends | \$201 - \$1,000 | None |
| Roth 2 ⇒ Vanguard Materials ETF (VAW) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | None |
| Roth 2 ⇒ VICI Properties Inc. Common Stock (VICI) [ST] | | None | Capital Gains | \$1 - \$200 | None |
| Roth 2 ⇒ WEC Energy Group, Inc. Common Stock (WEC) [ST] | | None | Capital Gains, Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Roth 2 ⇒ Williams Companies, Inc. (WMB) [ST] | | None | Capital Gains, Dividends | \$2,501 - \$5,000 | \$201 - \$1,000 |

* Investment Vehicle details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|-----------------------------------|------------------------|-------------------------------|-----------------------|
| Midi Health Inc | Salary | \$.00 | \$1,575.00 |
| DFAS-JFLL/IN | Air National Guard Pay | | \$11,567.37 |
| Noom Inc | Salary | \$.00 | \$196,507.83 |
| Four Block Foundation Inc | Salary | \$1,572.64 | \$4,333.30 |
| Trinet HR III, Inc. (Oshi Health) | Salary | \$52,124.39 | \$45,912.74 |

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|---|---------------------------|--|----------------------------------|
| Defense Finance & Act Serv (Agent for Dept of Energy) | Spouse salary | N/A | N/A |
| DFAS-CL/JFLP | Spouse - Reserve Pay | N/A | N/A |
| Ecton | LLC - Consulting Services | \$.00 | \$4,312.00 |

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|-----------------|-----------------------------|
| Member | Aviatrix Health LLC |

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|-------------|------------------------------|--|
| May 2025 | Rebecca Bennett, Oshi Health | Currently serving in a part-time consulting role |

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- 529 Plan
LOCATION: VA
DESCRIPTION: 529 Plan
- Merrill Lynch Investment Account
- IRA 1
- Roth 2
- Roth 1 (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent

child because they meet all three tests for exemption?

Yes No

CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Rebecca Bennett , 07/23/2025