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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Robert J. Wittman
Status: Member
State/District: VA01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2024
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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Abbott Laboratories (ABT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
AbbVie Inc. (ABBV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Accenture plc Class A Ordinary Shares (ACN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Amazon.com, Inc. (AMZN) [ST]		\$15,001 - \$50,000	None		<input type="checkbox"/>
American Express Company (AXP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
American Tower Corporation (AMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Apple Inc. (AAPL) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Blue Ridge Bank Money Market Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Blue Ridge Bankshares, Inc. Common Stock (BRBS) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brighthouse Whole Life [WU]		None	Surrendered life insurance policy	\$201 - \$1,000	<input type="checkbox"/>
Brighthouse Whole Life [WU]	SP	None	Surrendered life insurance policy	\$2,501 - \$5,000	<input type="checkbox"/>
Broadcom Inc. (AVGO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
C&F Bank Accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
C&F Financial Corporation - Common Stock (CFFI) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab Corporation (SCHW) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Chevron Corporation (CVX) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Comcast Corporation - Class A (CMCSA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Costco Wholesale Corporation (COST) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Crown Castle Inc. (CCI) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Dominion Energy, Inc. (D) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Elevance Health, Inc. (ELV) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Exxon Mobil Corporation Common Stock (XOM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
First Eagle Global Fund Class I (SGIIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
First Eagle Global Income Builder Fd Cl I (FEBIX) [MF]		None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
First Trust Amex Biotech Index Fund (FBT) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
First Trust Preferred Securities and Income Fund Class I (FPEIX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Harding Loevner Fund, Inc. International Eq Pt (HLMIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Hartford Financial Services Group, Inc. (HIG) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares MSCI USA Min Vol Factor ETF [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ITT Inc. (ITT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Linde plc Ordinary Share (LIN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Lord Abbett Inv Tr. Short Duration Income Fd Cl I (LLDYX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Lowe's Companies, Inc. (LOW) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
MainStay MacKay High Yield Municipal Bond Fund, Class I (MMHIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Marriott International - Class A (MAR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Marsh & McLennan Companies, Inc. (MMC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
McDonald's Corporation (MCD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mondelez International, Inc. - Class A (MDLZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley Cash Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Motorola Solutions, Inc. (MSI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
National Western Life Annuity [OT]	SP	\$1,001 - \$15,000	Annuity payment	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: This is a 403b TSA					
Nationwide Geneva Small Cap Growth Fund [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Neuberger Berman Intrinsic Value Fund [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Packaging Corporation of America (PKG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Pepsico, Inc. (PEP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Piedmont Office Realty Trust, Inc. Class A (PDM) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Principal MidCap Fund [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ProLogis, Inc. (PLD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Rental House - Nags Head, NC [RP]	JT	\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Nags Head, NC, US					
Rental Property - Montross VA [RP]	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Montross, VA, US					
Royal Gold, Inc. (RGLD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
S&P Global Inc. Common Stock (SPGI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab US Dividend Equity ETF (SCHD) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SPDR S&P 500 ETF Trust [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Texas Instruments Incorporated (TXN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TJX Companies, Inc. (TJX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Trane Technologies plc (TT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Union Pacific Corporation (UNP) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Virginia Retirement System [PE]		\$100,001 - \$250,000	Distribution	\$15,001 - \$50,000	<input type="checkbox"/>
Virginia Retirement System [PE]	SP	\$100,001 - \$250,000	Distribution	\$50,001 - \$100,000	<input type="checkbox"/>
Visa Inc. (V) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Walmart Inc. (WMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
WEC Energy Group, Inc. (WEC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Xylem Inc. Common Stock New (XYL) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Zoetis Inc. Class A Common Stock (ZTS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
401 (a) Virginia Cash Match Plan ⇒ Target Date 2025 Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
401 (a) Virginia Cash Match Plan ⇒ US Stock Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
457 Virginia Deferred Compensation Plan ⇒ Target Date 2025 Portfolio [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
457 Virginia Deferred Compensation Plan ⇒ US Stock Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
AXA Equitable Life Ins Co ⇒ AXA/Legg Mason Strat Alloc GB [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Apple Inc. (AAPL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Rising Dividend Achievers ETF (RDVY) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Value Line Dividend Index Fund [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Harding Loevner International Equity Portfolio [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco Exchange-Traded Self-Indexed Fund Trust Invesco Russell 1000 Dynamic Multifactor ETF (OMFL) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco S&P 500 Equal Weight Technology ETF (RSPT) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares U.S. Broker-Dealers & Securities Exchanges ETF (IAI) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Lord Abbett Inv Tr. Short Duration Income Fd Cl I (LLDYX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Microsoft Corporation - Common Stock (MSFT) [ST]					<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Morgan Stanley Cash Accounts [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Nationwide Geneva Small Cap Growth Fund (NWKDX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Neuberger Berman Intrinsic Value Fund [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ PGIM Jennison Global Opportunities Fund (PRJZX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ PGIM Ultra Short Bond ETF (PULS) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ PIMCO Income Fund (PONPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Principal MidCap Fund (PCBIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ T. Rowe Price Blue Chip Growth Fund (TRBCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ WisdomTree International Hedged Quality Dividend Growth Fund (IHDG) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ WisdomTree International Quality Dividend Growth Fund (IQDG) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley IRA ⇒ Equitable Financial Retirement Cornerstone 17 Seri [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		02/08/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		02/08/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		02/08/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]		02/09/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		02/09/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Lord Abbett Inv Tr. Short Duration Income Fd Cl I (LLDYX) [MF]		02/09/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		02/09/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares U.S. Broker-Dealers & Securities Exchanges ETF (IAI) [EF]		04/08/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		04/08/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		04/08/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley CD [BA] DESCRIPTION: Sale of a CD.		05/22/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Neuberger Berman Intrinsic Value Insti (NINLX) [MF]	SP	06/14/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ WisdomTree International Quality Dividend Growth Fund (IQDG) [EF]	SP	06/14/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	06/14/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Invesco Exchange-Traded Self-Indexed Fund Trust Invesco Russell 1000 Dynamic Multifactor ETF (OMFL) [EF]	SP	06/14/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust VL Dividend (FVD) [EF]	SP	06/14/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco S&P 500 Equal Weight Technology ETF (RSPT) [EF]	SP	06/14/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒	SP	06/14/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Harding Loevner Fund, Inc. International Eq Pt (HLMIX) [MF]					
Morgan Stanley INH IRA ⇒ WisdomTree International Hedged Quality Dividend Growth Fund (IHDG) [EF]	SP	06/14/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ First Trust Rising Dividend Achievers ETF (RDVY) [EF]	SP	06/14/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		08/06/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		08/06/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		08/06/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		08/06/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		08/06/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]		08/06/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		08/29/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		08/29/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		08/29/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley (JT) ⇒ First Eagle Global Income Builder Fd Cl I (FEBIX) [MF]		11/06/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		11/07/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		11/07/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		11/07/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		11/07/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		11/07/2024	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		11/07/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		11/07/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ iShares U.S. Broker-Dealers & Securities Exchanges ETF (IAI) [EF]		08/07/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]		11/07/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley (JT) ⇒ First Eagle Global Fund Class I (SGIIX) [MF]		11/07/2024	P	\$15,001 - \$50,000	
Morgan Stanley (JT) ⇒ First Eagle Global Income Builder Fd Cl I (FEBIX) [MF]		11/07/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

* 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
Virginia Retirement System	Spouse Retirement Distribution	N/A
Morgan Stanley IRA	Retirement Distributions	\$16,558.00
Morgan Stanley IRA	Spouse Retirement Distribution	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Blue Ridge Bank	November 2018	Real property at Nags Head, NC	\$500,001 - \$1,000,000
JT	Wells Fargo	June 2019	Mortgage on rental - Montross, VA	\$100,001 - \$250,000
JT	Wells Fargo Mortgage	July 2020	Mortgage on residence	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
August 1981	Virginia Retirement System	Defined Benefit

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Morgan Stanley INH IRA
- AXA Equitable Life Ins Co (Owner: SP)
- Morgan Stanley INH IRA (Owner: SP)
- Morgan Stanley IRA (Owner: SP)
- Morgan Stanley (JT)
LOCATION: US
- 457 Virginia Deferred Compensation Plan
- 401 (a) Virginia Cash Match Plan

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

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: Hon. Robert J. Wittman , 08/13/2025