



Filing ID #10065678

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Christopher Deluzio
Status: Member
State/District: PA17

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 04/25/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
J.P Morgan -Checking & Savings [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
J.P. Morgan - Checking & Savings [BA]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
J.P. Morgan - Checking & Savings [BA]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
529 Account - Child 4 ⇒ PA Target Enrollment 2042/2043 [5F] LOCATION: PA		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
529 Account 1 - Child 1 ⇒ Target Enrollment 2040 [5F] LOCATION: NY		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 Account 1 - Child 2 ⇒ Target Enrollment 2038 [5F] LOCATION: NY		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
529 Account 2 - Child 2 ⇒ PA Target Enrollment 2038/2039 [5F] LOCATION: PA		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
529 Account 2 - Child 1 ⇒ PA Target Enrollment 2036/2037 [5F] LOCATION: PA		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
529 Account 2 - Child 3 ⇒ PA Target Enrollment 2038/2039 [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMorgan Deposit Account [BA]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMorgan U.S.Government Money Market Capital (OGVXX) [MF] DESCRIPTION: Money market fund	SP	None	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Consumer Discretionary	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
(XLY) [EF]					
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Value ETF (VTV) [EF]	SP	None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT)		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
[EF]					
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMORGAN DEPOSIT ACCT B [BA]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMorgan U.S.Government Money Market Capital (OGVXX) [MF]		None	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM		\$50,001 -	Capital Gains,	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brokerage ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]		\$100,000	Dividends		<input type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan - 5491 Consolidated ⇒ JPMorgan Deposit Account [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
J.P. Morgan - 5491 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
J.P. Morgan - 5491 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
J.P. Morgan - 4265 Consolidated ⇒ JPMorgan Deposit Account [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
J.P. Morgan - 4265 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan - 4265 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
J.P. Morgan - 4265 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
J.P. Morgan -4265 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ JPMorgan Deposit Acct [BA] DESCRIPTION: Child 2 JPM	DC	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ JPMorgan Deposit Acct [BA] DESCRIPTION: Child 3 JPM	DC	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JPMorgan Equity Premium Income ETF (JEPI) [EF]					
J.P. Morgan -6872 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
JPM - IRA ⇒ JPMorgan Deposit Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JPM - JPMS LLC IRA ⇒ JPMorgan Deposit Account [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - JPMS LLC IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - JPMS LLC IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - Rollover IRA ⇒ JPMorgan Deposit Account [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - Rollover IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - Rollover IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - Rollover IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - Rollover IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - Rollover IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM - Roth IRA ⇒	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]					<input type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ JPMorgan Deposit Account [BA]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM - Roth IRA ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Consumer Staples ETF (VDC) [EF]					
JPM - Roth IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM - Roth IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM Brokerage ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
JPM Brokerage ⇒ JPMorgan U.S.Government Money Market Capital (OGVXX) [MF]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: Money Market Fund					
JPM Brokerage ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
JPM Brokerage ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
JPM Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JPM Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
JPM Brokerage ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JPM Brokerage ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JPM Roth IRA ⇒ JPMorgan Deposit Account [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM Roth IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM Roth IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]					<input type="checkbox"/>
JPM Roth IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM Roth IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM Roth IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
JPM Roth IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPM SEP IRA ⇒ JPMorgan Deposit Account [BA]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
JPM SEP IRA ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
JPM SEP IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [EF]	SP	05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	SP	05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Value ETF (VTV) [EF]	SP	05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	05/24/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]	SP	05/24/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM	SP	07/02/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Brokerage ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]					
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Value ETF (VTV) [EF]	SP	07/02/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	07/02/2024	P	\$1,001 - \$15,000	
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	07/25/2024	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	12/31/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		05/24/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]		05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]		05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [EF]		05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]		05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]		05/24/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		05/24/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]		08/15/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	01/19/2024	P	\$1,001 - \$15,000	
J.P. Morgan -4265 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	01/19/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
J.P. Morgan -4265 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	04/30/2024	P	\$1,001 - \$15,000	
J.P. Morgan -4265 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	04/30/2024	P	\$1,001 - \$15,000	
J.P. Morgan -4265 Consolidated ⇒	DC	07/02/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPMorgan Equity Premium Income ETF (JEPI) [EF]					
J.P. Morgan -4265 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	10/23/2024	P	\$1,001 - \$15,000	
J.P. Morgan -4404 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	01/19/2024	P	\$1,001 - \$15,000	
J.P. Morgan -4404 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	01/19/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
J.P. Morgan -4404 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	04/30/2024	P	\$1,001 - \$15,000	
J.P. Morgan -4404 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	04/30/2024	P	\$1,001 - \$15,000	
J.P. Morgan -4404 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	04/30/2024	P	\$1,001 - \$15,000	
J.P. Morgan -4404 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	07/02/2024	P	\$1,001 - \$15,000	
J.P. Morgan -4404 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	10/23/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	01/19/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	01/19/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
J.P. Morgan -6872 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	04/30/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	04/30/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	04/30/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	04/30/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
J.P. Morgan -6872 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	04/30/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	DC	04/30/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	07/02/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	10/23/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	10/23/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	10/23/2024	P	\$1,001 - \$15,000	
J.P. Morgan -6872 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	11/29/2024	P	\$1,001 - \$15,000	
JPM Roth IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]		05/24/2024	P	\$1,001 - \$15,000	
JPM - JPMS LLC IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]		03/04/2024	P	\$1,001 - \$15,000	
JPM - JPMS LLC IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]		05/24/2024	P	\$1,001 - \$15,000	
JPM - JPMS LLC IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]		10/04/2024	P	\$1,001 - \$15,000	
JPM Brokerage ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
JPM Brokerage ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	07/02/2024	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	03/04/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPM SEP IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	07/02/2024	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	07/02/2024	P	\$15,001 - \$50,000	
JPM SEP IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	10/04/2024	P	\$1,001 - \$15,000	
JPM SEP IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	10/04/2024	P	\$1,001 - \$15,000	
JPM - Roth IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	07/05/2024	P	\$15,001 - \$50,000	
JPM - Roth IRA ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [EF]	SP	07/05/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - Roth IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	07/05/2024	P	\$15,001 - \$50,000	
JPM - Roth IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	07/05/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - Roth IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	07/05/2024	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPM - Roth IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	07/05/2024	P	\$15,001 - \$50,000	
JPM - Roth IRA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	SP	07/05/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - Roth IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	07/05/2024	P	\$15,001 - \$50,000	
JPM - Roth IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	07/05/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - Roth IRA ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	07/05/2024	P	\$1,001 - \$15,000	
JPM - Roth IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	07/05/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	07/05/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
JPM - Roth IRA ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	SP	07/05/2024	S	\$50,001 - \$100,000	<input type="checkbox"/>
JPM SEP IRA ⇒ Lord Abbett Ultra Short Bond Class F3 (LUBOX) [MF]	SP	03/04/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
JPM - Roth IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	07/05/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
JPM - Roth IRA ⇒ Lord Abbett Short Duration Income Class F3 (LOLDX) [MF]	SP	07/05/2024	P	\$15,001 - \$50,000	
JPM - Roth IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	10/23/2024	P	\$1,001 - \$15,000	
JPM - Roth IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	10/23/2024	P	\$1,001 - \$15,000	
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	11/29/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	11/29/2024	P	\$1,001 - \$15,000	
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	11/29/2024	P	\$1,001 - \$15,000	
J.P. Morgan - 5491 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	11/29/2024	P	\$1,001 - \$15,000	
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	11/29/2024	P	\$1,001 - \$15,000	
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	DC	12/04/2024	P	\$1,001 - \$15,000	
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [EF]	DC	12/04/2024	P	\$1,001 - \$15,000	
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Health Care ETF (VHT) [EF]	DC	12/04/2024	P	\$1,001 - \$15,000	
J.P. Morgan - 5491 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	DC	12/04/2024	P	\$1,001 - \$15,000	
J.P. Morgan - 5491 Consolidated ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	DC	12/04/2024	P	\$1,001 - \$15,000	
J.P. Morgan - 5491 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [EF]	DC	12/04/2024	P	\$1,001 - \$15,000	
529 Account - Child 4 ⇒ PA Target Enrollment 2042/2043 [5F] LOCATION: PA		12/26/2024	P	\$15,001 - \$50,000	
529 Account - Child 4 ⇒ PA Target Enrollment 2042/2043 [5F] LOCATION: PA		12/30/2024	P	\$1,001 - \$15,000	

* 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
Kobre & Kim LLP	Spouse Nonemployee compensation	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	JPMorgan Chase Bank, N.A.	May 2024	Mortgage on private residence in Allegheny County, PA	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

<ul style="list-style-type: none">◦ 529 Account 2 - Child 2 LOCATION: PA◦ 529 Account 2 - Child 1 LOCATION: PA◦ 529 Account 1 - Child 2 LOCATION: NY◦ 529 Account 1 - Child 1 LOCATION: NY◦ J.P. Morgan -4404 Consolidated (Owner: DC) LOCATION: US DESCRIPTION: Child 2 JPM Consolidated

- J.P. Morgan -4265 Consolidated (Owner: DC)
LOCATION: US
DESCRIPTION: Child 1 JPM Consolidated
- J.P. Morgan -6872 Consolidated (Owner: DC)
LOCATION: US
DESCRIPTION: Child 3 JPM Consolidated
- 529 Account 2 - Child 3
LOCATION: PA
- Christopher R Deluzio Revocable Living Trust
- JPM Roth IRA
- JPM - JPMS LLC IRA
- Alexandra Zoe Bunnell Revocable Living Trust (Owner: SP)
- JPM Brokerage (Owner: SP)
LOCATION: US
- JPM SEP IRA (Owner: SP)
- Christopher R Deluzio Revocable Living Trust ⇒ JPM Brokerage
LOCATION: US
- Alexandra Zoe Bunnell Revocable Living Trust ⇒ JPM Brokerage (Owner: SP)
LOCATION: US
- JPM - IRA (Owner: SP)
- JPM - Roth IRA (Owner: SP)
- JPM - Rollover IRA
- J.P. Morgan - 5491 Consolidated (Owner: DC)
- 529 Account - Child 4
LOCATION: PA

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. Christopher Deluzio , 04/25/2025