



Filing ID #10063233

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. David Trone  
**Status:** Former Member  
**State/District:** MD06

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2025  
**Filing Date:** 04/18/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Arizona Fine Wine and Spirits LLC [OT] DESCRIPTION: alcoholic beverage retailer; Arizona		\$5,000,001 - \$25,000,000	Partnership Income	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
California Fine Wine & Spirits LLC [OT] DESCRIPTION: alcoholic beverage retailer; California		\$1,000,001 - \$5,000,000	Partnership Income	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
Cherry Hill Wine & Spirits, Inc. [OT] DESCRIPTION: alcoholic beverage retailer; New Jersey		\$1,000,001 - \$5,000,000	S Corporation Income	Over \$5,000,000	<input type="checkbox"/>
Colorado Fine Wines & Spirits, LLC [OT] DESCRIPTION: underlying investment in H & N Enterprise, Inc.		\$1,000,001 - \$5,000,000	S Corporation Income	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
Connecticut Fine Wine and Spirits, LLC [OT] DESCRIPTION: alcoholic beverage retailer; Connecticut		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
DRT Wine & Spirits, LLC [OT] DESCRIPTION: alcoholic beverage retailer; Minnesota COMMENTS: Per House financial disclosure rules permitting valuation of privately-held business based on the "year-end book value of interest in a		None	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
non-publicly-traded company," zero value based on end-of-year book value of non-publicly traded company.					
DT Georgia Holdings Inc. [OT]		\$250,001 - \$500,000	Partnership Income	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: underlying investment in DT Georgia Fine Wines & Spirits, LLC					
DT Virginia Fine Wines, LLC [OT]		\$500,001 - \$1,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
DESCRIPTION: alcoholic beverage retailer; Virginia					
Fine Wines & Spirits of North Texas, LLC [OT]		None	Partnership Income	Over \$5,000,000	<input type="checkbox"/>
DESCRIPTION: alcoholic beverage retailer; Texas					
COMMENTS: Per House financial disclosure rules permitting valuation of privately-held business based on the "year-end book value of interest in a non-publicly-traded company," zero value based on end-of-year book value of non-publicly traded company.					
Florida Fine Wine and Spirits, LLC [OT]		\$1,000,001 - \$5,000,000	Partnership Income	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
DESCRIPTION: alcoholic beverage retailer; Florida					
GFWS Holdings, Inc. [OT]		\$500,001 - \$1,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
DESCRIPTION: underlying investment in Georgia Fine Wine, LLC					
GFWS Holdings, Inc. [OT]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: underlying loan receivable from Retail Services & Systems, Inc.					
H. Alhadeff (Seattle, WA) [DO]		\$500,001 - \$1,000,000	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
COMMENTS: Loan Receivable					
Indiana Fine Wine & Spirits, LLC [OT]		None	Partnership Income	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
DESCRIPTION: alcoholic beverage retailer; Indiana					
COMMENTS: Per House financial disclosure rules permitting valuation of privately-held business based on the "year-end book value of interest in a non-publicly-traded company," zero value based on end-of-year book value of non-publicly traded company.					
Kentucky Fine Wines & Spirits, LLC [OT]		\$100,001 - \$250,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
DESCRIPTION: alcoholic beverage retailer; Kentucky					
Massachusetts Fine Wines and Spirits, LLC [OT]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
DESCRIPTION: alcoholic beverage retailer; Massachusetts					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Minnesota Fine Wine & Spirits, LLC [OT]  DESCRIPTION: alcoholic beverage retailer; Minnesota		\$1,000,001 - \$5,000,000	Partnership Income	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
Nevada Fine Wine & Spirits LLC [OT]  DESCRIPTION: alcoholic beverage retailer; Nevada		\$500,001 - \$1,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
New York Fine Wines & Spirits, LLC [OT]  DESCRIPTION: alcoholic beverage retailer; New York		\$5,000,001 - \$25,000,000	Proprietorship Income	Over \$5,000,000	<input type="checkbox"/>
Retail Services & Systems, Inc. [OT]  DESCRIPTION: alcoholic beverage retailer; Maryland		\$5,000,001 - \$25,000,000	S Corporation Income	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
Taste of New York Beer and Grocery LLC [OT]  DESCRIPTION: beer and grocery retailer; New York		\$500,001 - \$1,000,000	Proprietorship Income	None	<input type="checkbox"/>
TFWS, Inc. [OT]  DESCRIPTION: alcoholic beverage retailer; Maryland		\$500,001 - \$1,000,000	S Corporation Income	Over \$5,000,000	<input type="checkbox"/>
Washington Fine Wine and Spirits, LLC [OT]  DESCRIPTION: alcoholic beverage retailer; Washington		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
Wichita Fine Wine & Spirits, LLC [OT]  DESCRIPTION: alcoholic beverage retailer; Kansas COMMENTS: Per House financial disclosure rules permitting valuation of privately-held business based on the "year-end book value of interest in a non-publicly-traded company," zero value based on end-of-year book value of non-publicly traded company.		None	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
Wisconsin Fine Wines & Spirits, LLC [OT]  DESCRIPTION: alcoholic beverage retailer; Wisconsin		\$100,001 - \$250,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
A.M. Trust ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity 401(K) ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 401(K) ⇒		\$500,001 -	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Small Cap Index Fund (FSSNX) [MF]		\$1,000,000			<input type="checkbox"/>
Insurance Trust 1 ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	\$1,000,001 - \$5,000,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Insurance Trust 1 ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Insurance Trust 1 ⇒ Cash [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Insurance Trust 1 ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]	SP	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Insurance Trust 1 ⇒ iShares Semiconductor ETF (SOXX) [EF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Insurance Trust 1 ⇒ JPMorgan Growth Advantage Fund I Class (JGASX) [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Insurance Trust 1 ⇒ Mass Mutual Life Insurance Policy [WU]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Reflects cash surrender value rather than value of the policy due upon death					
Insurance Trust 2 ⇒ Mass Mutual Life Insurance Policy [WU]	SP	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
COMMENTS: Reflects cash surrender value rather than value of the policy due upon death					
JP Morgan Investment Account ⇒ JPM TR I Tax Free Reserve Sweep FD [BA]	JT	\$50,001 - \$100,000	Capital Gains, Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
JP Morgan Investment Account ⇒ JPMorgan 100% U.S. Treasury Securities Money Mkt Fd - Inst Shr Cl (JTSXX) [MF]	JT	None	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
JP Morgan Investment Account ⇒ JPMorgan Prime Money Market Fund - Institutional Share Class (JINXX) [MF]	JT	None	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
JP Morgan Investment Account 2 ⇒ Cash [BA]	JT	None	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ Cash [BA]	SP	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JP Morgan Revocable Trust 3 ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ Fidelity International Index Fund (FSPSX) [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ iShares S&P 500 Growth ETF (IVW) [EF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ iShares S&P 500 Value ETF (IVE) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ JPMorgan BetaBuilders Canada ETF (BBCA) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ JPMorgan BetaBuilders Developed Asia Pacific-ex Japan ETF (BBAX) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ JPMorgan BetaBuilders Europe ETF (BBEU) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ JPMorgan BetaBuilders Japan ETF (BBJP) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ Six Circles Managed Equity Portfolio International Unconstrained Fund (CMIUX) [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ Six Circles Managed Equity Portfolio U.S. Unconstrained Fund (CMEUX) [MF]	SP	\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒	SP	\$50,001 -	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SPDR Select Sector Fund - Financial (XLF) [EF]		\$100,000			<input type="checkbox"/>
JPM Roth IRA ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JPM Roth IRA ⇒ SPDR Series Trust SPDR S&P Biotech ETF (XBI) [EF]		None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
JPM Roth IRA ⇒ Vanguard Value ETF (VTV) [EF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
JPM Roth IRA 2 ⇒ Cash [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
JPM Roth IRA 2 ⇒ iShares S&P 500 Value ETF (IVE) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JPM Roth IRA 2 ⇒ iShares Semiconductor ETF (SOXX) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JPM Roth IRA 2 ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
JPM Roth IRA 2 ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
PNC Bank Accounts ⇒ PNC Bank Accounts [BA]	JT	\$500,001 - \$1,000,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
PNC Roth IRA ⇒ PNC Roth IRA [IH]		None	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Rolled over to JPM IRA 2					

\* 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?
Insurance Trust 1 ⇒ JPMorgan Growth Advantage Fund I Class (JGASX) [MF]	SP	04/22/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Insurance Trust 1 ⇒ JPMorgan 100% U.S. Treasury Securities Money Mkt Fd - Inst Shr Cl (JTSXX) [MF]	SP	04/23/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Insurance Trust 1 ⇒ JPMorgan Growth Advantage Fund I Class (JGASX) [MF]	SP	06/17/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Insurance Trust 1 ⇒ JPMorgan Growth Advantage Fund I Class (JGASX) [MF]	SP	08/15/2024	P	\$1,001 - \$15,000	
Insurance Trust 1 ⇒ JPMorgan Growth Advantage Fund I Class (JGASX) [MF]	SP	10/14/2024	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
JPM Roth IRA ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]		03/15/2024	P	\$1,001 - \$15,000	
JP Morgan Investment Account ⇒ JPMorgan 100% U.S. Treasury Securities Money Mkt Fd - Inst Shr Cl (JTSXX) [MF]	JT	01/09/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
JP Morgan Investment Account ⇒ JPMorgan 100% U.S. Treasury Securities Money Mkt Fd - Inst Shr Cl (JTSXX) [MF]	JT	01/31/2024	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
JPM Roth IRA ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]		05/13/2024	P	\$1,001 - \$15,000	
JPM Roth IRA ⇒ SPDR Series Trust SPDR S&P Biotech ETF (XBI) [EF]		07/02/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
JPM Roth IRA ⇒ Vanguard Value ETF (VTV) [EF]		07/02/2024	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
JPM Roth IRA ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]		07/02/2024	P	\$50,001 - \$100,000	
JPM Roth IRA ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]		12/13/2024	P	\$1,001 - \$15,000	
JPM Roth IRA ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]		12/13/2024	P	\$1,001 - \$15,000	
JP Morgan Investment Account ⇒ JPMorgan 100% U.S. Treasury Securities Money Mkt Fd - Inst	JT	02/14/2024	S (partial)	\$500,001 - \$1,000,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Shr Cl (JTSXX) [MF]					
JP Morgan Investment Account ⇒ JPMorgan 100% U.S. Treasury Securities Money Mkt Fd - Inst Shr Cl (JTSXX) [MF]	JT	02/02/2024	P	\$1,000,001 - \$5,000,000	
JP Morgan Investment Account ⇒ JPMorgan 100% U.S. Treasury Securities Money Mkt Fd - Inst Shr Cl (JTSXX) [MF]	JT	05/31/2024	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
JP Morgan Investment Account ⇒ JPMorgan 100% U.S. Treasury Securities Money Mkt Fd - Inst Shr Cl (JTSXX) [MF]	JT	06/10/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
JP Morgan Investment Account ⇒ JPMorgan 100% U.S. Treasury Securities Money Mkt Fd - Inst Shr Cl (JTSXX) [MF]	JT	06/24/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
JP Morgan Investment Account ⇒ JPMorgan 100% U.S. Treasury Securities Money Mkt Fd - Inst Shr Cl (JTSXX) [MF]	JT	07/03/2024	S	\$100,001 - \$250,000	<input type="checkbox"/>
JP Morgan Investment Account ⇒ JPMorgan Prime Money Market Fund - Institutional Share Class (JINXX) [MF]	JT	10/02/2024	P	\$1,000,001 - \$5,000,000	
JP Morgan Investment Account ⇒ JPMorgan Prime Money Market Fund - Institutional Share Class (JINXX) [MF]	JT	10/11/2024	S	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
JP Morgan Investment Account ⇒ JPM TR I Tax Free Reserve Sweep FD [BA]	JT	01/31/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
JP Morgan Investment Account ⇒ JPM TR I Tax Free Reserve Sweep FD [BA]	JT	03/31/2024	P	\$1,001 - \$15,000	
JP Morgan Investment Account ⇒ JPM TR I Tax Free Reserve Sweep FD [BA]	JT	04/30/2024	P	\$100,001 - \$250,000	
JP Morgan Investment Account ⇒ JPM TR I Tax Free Reserve Sweep FD [BA]	JT	05/31/2024	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
JP Morgan Investment Account ⇒ JPM TR I Tax Free Reserve Sweep FD [BA]	JT	10/31/2024	P	\$50,001 - \$100,000	



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JP Morgan Investment Account ⇒ JPM TR I Tax Free Reserve Sweep FD [BA]	JT	11/30/2024	P	\$1,001 - \$15,000	
JP Morgan Investment Account ⇒ JPM TR I Tax Free Reserve Sweep FD [BA]	JT	12/31/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ Six Circles Managed Equity Portfolio International Unconstrained Fund (CMIUX) [MF]	SP	03/13/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	03/21/2024	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	03/13/2024	P	\$1,001 - \$15,000	
JP Morgan Revocable Trust 3 ⇒ Six Circles Managed Equity Portfolio U.S. Unconstrained Fund (CMEUX) [MF]	SP	03/21/2024	P	\$50,001 - \$100,000	
JP Morgan Revocable Trust 3 ⇒ Six Circles Managed Equity Portfolio International Unconstrained Fund (CMIUX) [MF]	SP	11/25/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ Fidelity International Index Fund (FSPSX) [MF]	SP	11/25/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JP Morgan Revocable Trust 3 ⇒ Six Circles Managed Equity Portfolio U.S. Unconstrained Fund (CMEUX) [MF]	SP	11/25/2024	P	\$15,001 - \$50,000	
JPM Roth IRA 2 ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]	SP	03/18/2024	P	\$15,001 - \$50,000	
JPM Roth IRA 2 ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]	SP	05/14/2024	P	\$15,001 - \$50,000	
JPM Roth IRA 2 ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]	SP	12/13/2024	P	\$1,001 - \$15,000	
JPM Roth IRA 2 ⇒ JPMorgan U.S. Equity Fund I Class (JUESX) [MF]	SP	12/13/2024	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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	PNC Bank, N.A.	July 2023	Business Loan	\$5,000,001 - \$25,000,000
	PNC Bank, N.A.	June 2017	Business Loan	\$5,000,001 - \$25,000,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Director/President/Secretary/Treasurer	Cherry Hill Wine & Spirits, Inc.
COMMENTS: Unpaid position in family-owned business	
Co-Manager	Colorado Fine Wines & Spirits LLC
COMMENTS: Unpaid position in family-owned business	
Co-Manager/Co-President	Fine Wines & Spirits of North Texas, LLC
COMMENTS: Unpaid position in family-owned business	
President	Massachusetts Fine Wines & Spirits, LLC
COMMENTS: Unpaid position in family-owned business	
Manager/President/Secretary/Treasurer	New York Fine Wine & Spirits, LLC
COMMENTS: Unpaid position in family-owned business	
Manager/President/Secretary/Treasurer	Taste of New York Beer & Grocery, LLC
COMMENTS: Unpaid position in family-owned business	
Director/President/Secretary/Treasurer	TFWS, Inc.
COMMENTS: Unpaid position in family-owned business	
Director	Retail Services & Systems, Inc.
COMMENTS: Unpaid position in family-owned business	
Director/President/Secretary/Treasurer	Wichita Fine Wine & Spirits LLC
COMMENTS: Unpaid position in family-owned business	

**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**

- PNC Roth IRA
- JP Morgan Investment Account (Owner: JT)  
LOCATION: US
- Insurance Trust 1 (Owner: SP)
- Insurance Trust 2 (Owner: SP)
- PNC Bank Accounts (Owner: JT)  
LOCATION: US
- A.M. Trust (Owner: SP)
- JP Morgan Investment Account 2 (Owner: JT)  
LOCATION: US
- JP Morgan Revocable Trust 3 (Owner: SP)
- Fidelity 401(K)
- JPM Roth IRA
- JPM Roth IRA 2 (Owner: SP)

**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. David Trone , 04/18/2025