AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 13101-13111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Adelman, Lynn S.	Eastern District of Wisconsin	05/13/2024
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
District Judge - Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
517 East Wisconsin Avenue, Room 364 Milwaukee, WI 53202		

IMPORTANT NOTES: ***The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.***

I. POSITIONS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☑ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.		
2.		
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements.)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.	2023	State of Wisconsin - Pension/Retirement	$20,702.00
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE
1.	2023	Heritage Flower Farm LLC: $79,213.00
2.	2023	MacMillan Holdings LLC: $12,500.00
3.		
4.		

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

Name of Person Reporting	Date of Report
Adelman, Lynn S.	05/13/2024

V. GIFTS. *(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1. Citizen Bank	A	Interest	K	T					
2. PNC Bank	A	Interest	L	T					
3. AppleTree CU	A	Interest	K	T					
4. Fidelity Gov't MM	A	Interest	J	T	Buy	12/15/23	J		Transfer from Schwab
5. Schwab Gov't MM	A	Interest			Sold	12/15/23	J		Transfer to Fidelity
6. WPC	A	Dividend	K	T					
7. DFA Int'l Core Equity	E	Dividend	O	T	Buy (add'l)	12/01/23	J		Buy More from Dividends
8. DFA US Core Equity	E	Dividend	P1	T	Buy (add'l)	03/03/23	J		Buy More from Dividends
9. DFA Muni Real Return	D	Dividend	N	T	Buy (add'l)	01/01/23	J		Buy More from Dividends
10.	D	Dividend	N	T	Buy (add'l)	02/01/23	J		Buy More from Dividends
11.	D	Dividend	N	T	Buy (add'l)	03/03/23	J		Buy More from Dividends
12.	D	Dividend	N	T	Buy (add'l)	07/28/23	J		Buy More from Dividends
13. DFA Real Estate Sec.					Sold	05/26/23	J		
14. DFA Small Cap. Value	A	Dividend			Sold	03/17/23	J		
15. Dimensial EFT Trust US	A	Dividend	N	T					
16. Edgwell	A	Dividend	J	T	Buy (add'l)	01/07/23	J		Buy More from Dividends
17.	A	Dividend	J	T	Buy (add'l)	04/06/23	J		Buy More from Dividends

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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18.		A	Dividend	J	T	Buy (add'l)	06/12/23	J		Buy More from Dividends
19.	Energizing Holding	A	Dividend	J	T					
20.	Exon Mobil	B	Dividend	K	T	Buy (add'l)	06/12/23	J		Buy More from Dividends
21.	Gilead Sciences	A	Dividend	K	T	Buy (add'l)	06/12/23	J		Buy More from Dividends
22.	I Shares Core S&P S&P	A	Distribution	M	T					
23.	I Shares Coreus Agg	C	Dividend	N	T	Buy	10/31/23	N		
24.	Janus European	B	Dividend	K	T					
25.	Net Lease Office	A	Dividend	J	T	Buy	11/01/23	J		Spinoff from WPC
26.	Nike	A	Dividend	K	T	Buy (add'l)	04/23/23	J		From Dividends
27.		A	Dividend	K	T	Buy (add'l)	10/13/23	J		From Dividends
28.	Pfizer	B	Dividend	L	T	Buy (add'l)	06/12/23	J		From Dividends
29.	SPD Portfolio S&P 400	B	Dividend	N	T	Buy (add'l)	11/10/23	J		From Dividends
30.	SPD Portfolio Emerg	A	Dividend	K	T					
31.	SPRD Midcap	C	Dividend	J	T	Buy	12/06/23	J		
32.	Select Sector	A	Dividend	L	T	Buy	10/13/23	L		
33.	Total US Treasury Securities	A	Dividend	L	T					
34.	Vanguard VGRD	B	Dividend	M	T					

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35. US Treasury Bills	A	Dividend	L	T					
36. Vanguard Intrm	A	Dividend	L	T					
37. Viatris	A	Dividend	J	T	Buy	06/16/23	J		From Dividends
38. Shell	A	Dividend	J	T					

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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

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IX. CERTIFICATION.

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. app. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Lynn S. Adelman

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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