AO 10
Rev. 1/2021

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2021

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 101-111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Alonso, Jorge L.	United States District Court, Northern District of Illinois	05/16/2022
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**
Active Judge, United States District Court	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021

7. Chambers or Office Address

Everett M. Dirksen
United States Courthouse
219 South Dearborn Street
Chicago, Illinois 60604

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 pp. 9-13 of filing instructions)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Member, Board of Directors	Daniel Murphy Scholarship Fund
2.	Adjunct Professor	UIC Law School
3.	Member, Board of Directors	Cristo Rey Jesuit High School
4.	Lecturer at Law	University of Chicago Law School
5.		

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions)*

☐ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.	2003	Judges' Retirement System of Illinois
2.		
3.		

Name of Person Reporting	Date of Report
Alonso, Jorge L.	05/16/2022

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions)*

A. Filer's Non-Investment Income

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

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.	2021	UIC Law School: compensation as adjunct professor	$2,000.00
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 AND TYPE
1.	2021	Associate Judge, State of Illinois
2.		
3.		
4.		

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

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)

☑ NONE *(No reportable reimbursements.)*

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

Name of Person Reporting	Date of Report
Alonso, Jorge L.	05/16/2022

V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*

☑ NONE *(No reportable gifts.)*

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

VI. LIABILITIES. *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*

☐ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.	Northwestern Mutual Life Insurance Company	Loan from life insurance policy	J
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Alonso, Jorge L.	05/16/2022

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. American Funds: Bond Fund of America	A	Int./Div.	J	T					
2. American Funds: EuroPacific Growth Fund	A	Int./Div.	J	T					
3. American Funds: Growth Fund of America	A	Int./Div.	K	T					
4. American Funds: Intermediate Bond Fund of America	A	Int./Div.	J	T					
5. American Funds: New Economy Fund	A	Int./Div.	J	T					
6. American Funds: New Perspective Fund	A	Int./Div.	K	T					
7. American Funds: Smallcap World Fund	A	Int./Div.	J	T					
8. American Funds: The Investment Company of America	A	Int./Div.	J	T					
9. American Funds: Washington Mutual Investors Fund	A	Int./Div.	K	T					
10. Bright Start (Sec. 529) Age Based 17-18 Moderate Portfolio Acct. #1	A	Int./Div.	M	T	Buy (add'l)	03/26/21	J		
11. Bright Start (Sec. 529) Age Based 19+ Moderate Poirtfolio Acct. #2	A	Int./Div.	K	T	Buy (add'l)	03/26/21	J		
12. T. Rowe Price New Income Fund	A	Int./Div.	J	T	Buy (add'l)	07/15/21	J		
13. T. Rowe Price New Income Fund	A	Int./Div.	J	T	Sold (part)	07/26/21	J	A	
14. Chase Bank: Cash Accounts	A	Interest	J	T					
15. North Shore Bank/Wintrust Bank: Savings Account	A	Interest	J	T	Buy	07/01/21	J		
16. Northwestern Mutual Life Ins. Co. (Whole Life Policy)	A	Int./Div.	J	T					
17. Vanguard Charlotte FDS: Vanguard Total International Bond Index Fund	A	Int./Div.	J	T	Sold (part)	01/25/21	J	A	

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		

Name of Person Reporting	Date of Report
Alonso, Jorge L.	05/16/2022

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
18. JPMorgan US Government Money Market Fund	A	Int./Div.	J	T					
19. Vanguard Index Trust (S&P 500 Index)	A	Int./Div.	K	T					
20. JPMorgan ETF-Canada	A	Int./Div.	J	T	Buy (add'l)	07/15/21	J		
21. JPMorgan ETF-Asia Excluding Japan	A	Int./Div.	J	T	Buy (add'l)	01/25/21	J		
22. JPMorgan ETF-Asia Excluding Japan	A	Int./Div.	J	T	Buy (add'l)	07/15/21	J		
23. iShares US Treasury Bond ETF	A	Interest	J	T	Buy	04/19/21	J		
24. iShares US Treasury Bond ETF	A	Interest	J	T	Buy (add'l)	07/15/21	J		
25. Six Circles U.S. Equity Fund	A	Int./Div.	K	T	Buy (add'l)	02/11/21	J		
26. Six Circles U.S. Equity Fund	A	Int./Div.	K	T	Sold (part)	07/15/21	J	A	
27. Vanguard Total Bond Market Index Fund	A	Interest	J	T					
28. Fidelity International Index Fund	A	Int./Div.	J	T	Buy (add'l)	01/25/21	J		
29. Fidelity International Index Fund	A	Int./Div.	J	T	Buy (add'l)	07/15/21	J		
30. iShares 20 Year Treasury Bond ETF	A	Interest			Sold (part)	04/19/21	J	A	
31. iShares 20 Year Treasury Bond ETF	A	Interest			Sold	07/26/21	J	A	
32. iShares MBS ETF	A	Int./Div.	J	T	Buy (add'l)	07/15/21	J		
33. PGIM High Yield Fund	A	Interest			Sold (part)	04/19/21	J	A	
34. PGIM High Yield Fund	A	Interest			Sold	05/19/21	J	A	

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35. Six Circles Global Bond Fund	A	Interest	J	T	Buy (add'l)	07/15/21	J		
36. Vanguard Intermediate Term Corporate Bond ETF	A	Interest			Sold	01/25/21	J	A	
37. iShares Emerging Markets ETF	A	Int./Div.			Sold (part)	07/15/21	J	A	
38. iShares Emerging Markets ETF	A	Int./Div.			Sold	10/21/21	J	A	
39. Six Circles Credit Oppty Fund	A	Int./Div.	J	T	Buy (add'l)	07/15/21	J		
40. Blackrock Index FDS: iShares MSCI EAFE International Index Fund	A	Int./Div.	K	T					
41. Fidelity 500 Index Fund	A	Int./Div.	L	T	Sold (part)	01/25/21	J	A	
42. Fidelity 500 Index Fund	A	Int./Div.	L	T	Sold (part)	02/11/21	J	A	
43. Fidelity 500 Index Fund	A	Int./Div.	L	T	Sold (part)	07/15/21	J	A	
44. Fidelity 500 Index Fund	A	Int./Div.	L	T	Buy (add'l)	10/21/21	J		
45. JPMorgan ETF-Europe	A	Int./Div.	J	T	Buy (add'l)	04/19/21	J		
46. JPMorgan ETF-Europe	A	Int./Div.	J	T	Buy (add'l)	05/19/21	J		
47. JPMorgan ETF-Europe	A	Int./Div.	J	T	Buy (add'l)	07/15/21	J		
48. JPMorgan ETF-Japan	A	Int./Div.	J	T	Buy (add'l)	01/25/21	J		
49. JPMorgan ETF-Japan	A	Int./Div.	J	T	Buy (add'l)	07/15/21	J		
50. JPMorgan ETF-Japan	A	Int./Div.	J	T	Sold (part)	10/21/21	J	A	
51. Six Circles Int'l Equity Fund	A	Int./Div.	K	T	Buy (add'l)	04/19/21	J		

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52. Six Circles Int'l Equity Fund	A	Int./Div.	K	T	Buy (add'l)	07/15/21	J		
53. Six Circles Int'l Equity Fund	A	Int./Div.	K	T	Buy (add'l)	10/21/21	J		
54. Vanguard Total International Bond ETF	A	Interest	J	T	Sold (part)	01/25/21	J	A	
55. Vanguard Total International Bond ETF	A	Interest	J	T	Buy (add'l)	07/15/21	J		
56. Vanguard Short Term Bond ETF	A	Interest	J	T	Buy	07/26/21	J		
57. Vanguard Total Bond ETF	A	Interest	J	T	Buy	05/19/21	J		
58. Vanguard Total Bond ETF	A	Interest	J	T	Buy (add'l)	07/15/21	J		

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Name of Person Reporting	Date of Report
Alonso, Jorge L.	05/16/2022

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

Part I. Positions (Line 4):

Note that while Judge Alonso is a Lecturer at Law at the University of Chicago Law School, his is a voluntary/unpaid position.

Name of Person Reporting	Date of Report
Alonso, Jorge L.	05/16/2022

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. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Jorge L. Alonso

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. § 104)

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544