AO 10
Rev. 1/2021

FINANCIAL DISCLOSURE REPORT
FOR CALENDAR YEAR 2023

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	06/25/2024
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**
Active Judge, United States District Court	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023

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.	Lecturer at Law	University of Chicago Law School
3.	Member, Board of Directors	Cristo Rey Jesuit High School
4.		
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.	06/25/2024

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.			
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.	2023	Associate Judge, State of Illinois
2.	2023	Self employed attorney (Note: An attorney fee was received in 2023, but was earned as a self employed attorney prior to becoming an Associate Judge.)
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.	06/25/2024

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.	06/25/2024

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. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure		B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(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 19+ Moderate Portfolio Acct. #1	A	Int./Div.	J	T	Buy (add'l)	01/02/23	J		
11.	Bright Start (Sec. 529) Age Based 19+ Moderate Portfolio Acct. #1	A	Int./Div.	J	T	Sold (part)	07/01/23	M	A	
12.	Bright Start (Sec. 529) Age Based 19+ Moderate Poirtfolio Acct. #2	A	Int./Div.	J	T	Buy (add'l)	01/02/23	J		
13.	Bright Start (Sec. 529) Age Based 19+ Moderate Poirtfolio Acct. #2	A	Int./Div.	J	T	Sold (part)	07/01/23	J	A	
14.	Chase Bank: Cash Accounts	A	Interest	J	T					
15.	North Shore Bank/Wintrust Bank: Savings Account	A	Interest	J	T					
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					

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.	06/25/2024

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. 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)	D. (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	Sold (part)	06/20/23	J	A	
21. JPMorgan ETF-Asia Excluding Japan	A	Int./Div.	J	T					
22. iShares US Treasury Bond ETF	A	Interest			Sold	12/07/23	J	A	
23. Six Circles U.S. Equity Fund	A	Int./Div.	K	T	Buy (add'l)	06/20/23	J		
24. Vanguard Total Bond Market Index Fund	A	Interest	J	T					
25. Fidelity International Index Fund	A	Int./Div.			Buy (add'l)	01/19/23	J		
26. Fidelity International Index Fund	A	Int./Div.			Sold	06/20/23	J	A	
27. iShares MBS ETF	A	Int./Div.	J	T					
28. Six Circles Credit Oppty Fund	A	Int./Div.	J	T	Sold (part)	02/14/23	J	A	
29. Blackrock Index FDS: iShares MSCI EAFE International Index Fund	A	Int./Div.	J	T	Sold (part)	06/20/23	J	A	
30. Fidelity 500 Index Fund	A	Int./Div.	L	T	Sold (part)	01/19/23	J	A	
31. JPMorgan ETF-Europe	A	Int./Div.	J	T	Buy	01/19/23	J		
32. JPMorgan ETF-Europe	A	Int./Div.	J	T	Buy (add'l)	02/14/23	J		
33. JPMorgan ETF-Europe	A	Int./Div.	J	T	Sold (part)	07/31/23	J	A	
34. JPMorgan ETF-Japan	A	Int./Div.	J	T	Buy (add'l)	06/20/23	J		

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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
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35. Six Circles Int'l Equity Fund	A	Int./Div.	K	T					
36. Vanguard Total International Bond ETF	A	Interest	J	T	Buy (add'l)	02/14/23	J		
37. Vanguard Intermediate Term Corporate Bond ETF	A	Interest	J	T	Buy	12/07/23	J		
38. Vanguard Total Bond ETF	A	Interest	J	T	Sold (part)	12/07/23	J	A	
39. iShares Core S&P Mid Cap ETF	A	Int./Div.			Buy	07/31/23	J		
40. iShares Core S&P Mid Cap ETF	A	Int./Div.			Sold	12/13/23	J	A	
41. Six Circles Global Bond Fund	A	Interest	K	T					

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	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	
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Alonso, Jorge L.	06/25/2024

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.

Additionally, both Board of Director memberships disclosed in Part I. POSITIONS are non-paid, voluntary positions.

Name of Person Reporting	Date of Report
Alonso, Jorge L.	06/25/2024

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
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Washington, D.C. 20544