AO 10
Rev. 1/2022

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
Altman, Roy K.	U.S. District Court, Southern District of Florida	07/16/2022
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Court Judge	**5a. Report Type (check appropriate type)** ☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	**6. Reporting Period** 01/01/2021 **to** 12/31/2021
7. Chambers or Office Address Wilkie D. Ferguson, Jr. Federal Courthouse 400 North Miami Avenue Chambers 12-4 Miami, Florida 33128		

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.	Member	AEI Enterprise Club National Board
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.	2021	United States Judges	$210,642.00
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.	2021	Biscayne Bay Waterkeeper - Spouse
2.		
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.					

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.	U.S. Bank	Mortgage	O
2.	NELNET Loan Services	Student Loan	K
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Altman, Roy K.	07/16/2022

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		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)	
1.	Rental House - Asheville, North Carolina, Buncombe County	D	Rent	P1	R					
2.	Trust dtd 1/11/11 (34)		None	P1						
3.	Bank of America Sweep Account	A	Interest	N	T					
4.	Abbott Labs - Common Stock	A	Dividend	L	T					
5.	Abbvie Inc. - Common Stocl	B	Dividend	L	T					
6.	Automatic Data Proc. - Common Stock	B	Dividend	M	T					
7.	Bank New York Mellon - Common Stock	B	Dividend	L	T					
8.	Cisco Systems Inc. - Common Stock	B	Dividend	L	T					
9.	Diageo PLC SPSD ADR New	A	Dividend	L	T					
10.	Dover - Common Stock	A	Dividend	L	T					
11.	Embraer SA SponSRD ADR	B	Dividend	K	T					
12.	Emerson Electric Co. - Common Stock	B	Dividend	L	T					
13.	General Electric - Common Stock	A	Dividend	J	T					
14.	Illinois Tool Works - Common Stock	B	Dividend	L	T					
15.	Intel Works - Common Stock	B	Dividend	L	U					
16.	Johnson & Johnson - Common Stock	B	Dividend	L	T					
17.	Kimberly Clark - Common Stock	B	Dividend	L	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		
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☐ 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)	
18. McDonalds Corp - Common Stock	C	Dividend	L	T					
19. Pepsico Inc. - Common stock	B	Dividend	L	T					
20. Procter & Gamble Co. - Common Stock	B	Dividend	L	T					
21. Reckitt Benckiser Group	A	Dividend	K	T					
22. Unilever PLC New ADR	B	Dividend	K	U					
23. Wabtec - Common Stock	A	Dividend	J	T					
24. Waste Management Inc. - Common Stock	B	Dividend	M	T					
25. Zoetis Inc. - Common Stock	A	Dividend	N	T					
26. Amazon - Common Stock	A	Dividend	M	T					
27. Apple Inc. - Common Sotck	D	Dividend	P1	T					
28. Chipotle Mexican Grill - Common Stock	A	Dividend	L	T					
29. META Platforms	B	Dividend	M	T					
30. Johnson & Johnson	B	Dividend	L	T					
31. JP Morgan	B	Dividend	L	T					
32. McDonald's Corp	B	Dividend	L	T					
33. Netflix - Common Stock	A	Dividend	K	T					
34. Oracle Corp.	A	Dividend	K	T					

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35. Starbucks Corp - Common Stock	B	Dividend	L	T					
36. Union Pacific	B	Dividend	M	T					
37. 3M Company - Common Stock	B	Dividend	L	T					
38. American Cap Inc BLDR - Mutual Fund	D	Distribution	M	T					
39. Calvert Global Water - Mutual Fund	A	Distribution	N	T					
40. Invesco QQQ TR Series 1 - Mutual Fund	A	Distribution	K	T					
41. SPDR Dow Jones Industrial Average - Mutual Fund	A	Distribution	J	T					
42. Apergey Corp. - Common Stock	A	Dividend	J	T					
43. Kraft - Common Stock	A	Dividend	K	T					
44. American /New World Fund - Mutual Fund	A	Distribution	J	T					
45. Metlife, Inc. - Common Stock	A	Dividend	J	T					
46. IRA		None							
47. Charles Schwab Sweep Account	A	Interest	J	T					
48. Berkshire Hathaway - Common Stock	A	Dividend	J	T					
49. IShares Core S&P 500 - ETF	A	Dividend	J	T					
50. IShares Core US Aggregate Bond ETF	A	Dividend	J	T					
51. IShares MSCI EAFE - ETF	A	Dividend	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

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52. IShare North American Natural Resou - ETF	A	Dividend	J	T					
53. Vangaurd FTSE Emerging Markets - ETF	A	Dividend	J	T					
54. Vanguard Real Estate - ETF	A	Dividend	J	T					
55. Vanguard Small Cap - ETF	A	Dividend	J	T					
56. IRA Rollover		None							
57. Charles Schwab Sweep Account	D	Dividend	J	T					
58. Berkshire Hathway - Common Stock	A	Dividend	K	T					
59. Deere & Co. - Common Sotck	A	Dividend	K	T					
60. Freeport McMoran	A	Dividend	K	T					
61. Goldman Sachs	A	Dividend	J	T					
62. Home Depot	A	Dividend	J	T					
63. IBM Corp. - Common Stock	A	Dividend	K	T					
64. JP Morgan Chase & Co. - Common Stock	A	Dividend	J	T					
65. Johnson & Johnson - Common Stock	A	Dividend	J	T					
66. Kyndryl Holdings	A	Dividend	J	T					
67. Mastercard, Inc. - Common Stock	A	Dividend	J	T					
68. Microsoft Corp. - Common Stock	A	Dividend	K	T					

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69. Paypal Holdings, INc. - Common Stock	A	Dividend	K	T					
70. Pepsico, Inc. - Common Stock	A	Dividend	J	T					
71. Phillips 66	A	Dividend	J	T					
72. Raytheon Technologies	A	Dividend	J	T					
73. Southern Co. - Common Stock	A	Dividend	J	T					
74. The Goldman Sachs Co. - Common Stock	A	Dividend	K	T					
75. Verizon Communications - Common Stock	A	Dividend	J	T					
76. Trust DT1\11\11 (CS)		None							
77. Charles Schwab - Sweep Account	A	Interest	K	T					
78. Apple, Inc - Common Stock	A	Dividend	L	T					
79. Berkshire Hathaway - Common Stock	A	Dividend	L	T					
80. Bristol Myers Squibb - Common Stock	A	Dividend	L	T					
81. Caterpillar, Inc. - Common Stock	A	Dividend	K	T					
82. Chevron Corp. - Common Stock	A	Dividend	K	T					
83. Cracker Barrel Old Count - Common Stock	A	Dividend	K	T					
84. Deere & Co. - Common Stock	A	Dividend	K	T					
85. Freeport McMoran	A	Dividend	J	T					

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86. IBM Corp. - Common Stock	A	Dividend	K	T					
87. Intel Corp. - Common Stock	A	Dividend	K	T					
88. JP Morgan - Common Stock	A	Dividend	K	T					
89. Johnson & Johnson - Common Stock	A	Dividend	K	T					
90. Mastercard, Inc. - Common Stock	A	Dividend	K	T					
91. Microsoft Corp. - Common Stock	A	Dividend	K	T					
92. Paypal Holdings Inc. - Common Stock	A	Dividend	L	T					
93. Raytheon Technologies	A	Dividend	J	T					
94. Pepsico, Inc. - Common Stock	A	Dividend	J	T					
95. Southern Co. - Common Stock	A	Dividend	K	T					
96. SPDR S&P Midcap	A	Dividend	L	T					
97. United Technologies - Common Stock	A	Dividend	J	T					
98. Verizon Communications - Common Stock	A	Dividend	J	T					
99. Trust DTD 10\01\18									
100. Charles Schwab Sweep Account	A	Interest	K	T	Sold (part)	01/29/21	K		
101. Charles Schwab Sweep Account	A	Interest			Sold	03/02/21	K		
102. Charles Schwab Sweep Account	A	Interest			Sold	05/21/21	J		

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103. Charles Schwab Sweep Account	A	Interest			Sold	08/20/21	K		
104. Charles Schwab Sweep Account	A	Interest			Sold	08/25/21	K		
105. Amazon		Dividend	K	T					
106. Apple, Inc. - Common Stock	C	Dividend	M	T					
107. Auto Data Processing	A	None	K	T					
108. Berkshire Hathaway, Inc. - Common Stock	A	Dividend	M	T					
109. Boeing Co. - Common Stock	A	Dividend	J	T					
110. Bank of America	A	Dividend	J	T					
111. Berkshire Hathaway	B	Dividend	M	T					
112. Bristol Myers Squibb - Common Stock	A	Dividend	J	T					
113. Caterpillar, Inc. - Common Stock	A	Dividend	K	T					
114. Chevron Corp. - Common Stock	A	Dividend	K	T					
115. Costco Wholesale Co. - Common Stock	A	Dividend	K	T					
116. Cracker Barrel Old Count	A	Dividend	K	T					
117. Deere & Co. - Common Stock	A	Dividend	L	T					
118. Duke Energy Corp. - Common Stock	A	Dividend	K	T					
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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		
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
Altman, Roy K.	07/16/2022

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	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)	
120. Exxon Mobil Corp. - Common Stock	A	Dividend	J	T	Sold (part)	08/25/21	J		
121. Freeport McMoran	A	Dividend	K	T					
122. FRP Holdings, Inc. - Common Stock	A	Dividend	J	T					
123. Home Depot	B	Dividend	K	T					
124. IBM Corp. - Common Stock	B	Dividend	K	T					
125. Intel Corp. - Common Stock	A	Dividend	K	T	Sold (part)	08/25/21	K		
126. JP Morgan Chase & Co. - Common Stock	A	Dividend	K	T					
127. Johnson & Johnson - Common Stock	B	Int./Div.	K	T					
128. Kimberly Clark	A	Dividend	J	T					
129. Kyndryl Holdings	A	Dividend	J	T					
130. Lockheed Martin Corp. - Common Stock	A	Dividend	K	T					
131. Mastercard, Inc. - Common Stock	A	Dividend	K	T					
132. McDonalds Corp. - Common Sotck	A	Dividend	K	T					
133. Merck	B	Dividend	K	T					
134. Orgamon & Co.		None			Sold	08/25/21	J		
135. Metlife, Inc. - Common Stock	A	Dividend	J	T					
136. Microsoft Corp. - Common Stock	A	Dividend	L	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	
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Name of Person Reporting	Date of Report
Altman, Roy K.	07/16/2022

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	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)	
137. Morgan Stanley - Preferred Stock	A	Dividend	J	T					
138. Paypal Holdings, Inc. - Common Stock	A	Dividend	K	T					
139. Pepsico, Inc. - Common Stock	A	Dividend	K	T					
140. Phillips, Inc. - Common Stock	A	Dividend	J	T	Sold (part)	08/25/21	J		
141. Raytheon	A	Dividend	J	T					
142. Southern Co. - Pfd	B	Dividend	K	T					
143. The Goldman Sachs - Pfd	A	Int./Div.	J	T					
144. The Goldman Sachs - Common Stock	A	Int./Div.	J	T					
145. United Technologies - Common Stock	A	Dividend	K	T					
146. Verizon Communications - Common Stock	B	Dividend	J	T					
147. Vulcan Materials - Common Stock	A	Dividend	L	T					
148. [redacted]		None							
149. Watermark Partners Fund IV LLC	A	Distribution	J	V					
150. [redacted] Account (CS)		None							
151. Aggressive Track: 95% Equity Portfolio	B	Dividend	L	T					
152. Moderately Aggresive Track 80% Equity	A	Dividend	K	T					
153. Moderate Track 80% Equity Portfolio	A	Dividend	K	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
Altman, Roy K.	07/16/2022

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

Valuation Method Ussed for the Watermark Partners Fund IV
The Valuation method used for Watermark Partners Fund IV LLC is the capital account as listed on the 2021 Form K-1.

Name of Person Reporting	Date of Report
Altman, Roy K.	07/16/2022

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/ Roy K. Altman

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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