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
Beaton, Benjamin J.	US District Court, Western District of Kentucky	08/10/2024
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**
US District Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
601 W. Broadway Louisville, KY 40202		

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.	Trustee, Board Secretary	Centre College of Kentucky
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.	10/31/2004	Public Pension funded by Disclosing Party via salary deferral; Kentucky Employee Retirement Systems
2.		
3.		

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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.			
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	Cincinnati Children's Hospital
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.	Federalist Society	01/05/23-01/06/23	Cambridge, MA	Educational Speaking Engagement	Travel & Lodging Expenses
2.	Federalist Society	03/16/23-03/17/23	Washington, DC	Educational Speaking Engagement	Travel & Lodging Expenses
3.	Rodel Institute	08/24/23-08/27/23	Sun Valley, ID	Non-FJC Seminar or Program	Travel & Lodging Expenses
4.	Federalist Society	10/08/23-10/10/23	New York, NY	Educational Speaking Engagement	Travel & Lodging Expenses

5.	Federalist Society	10/23/23-10/24/23	New Haven, CT	Educational Speaking Engagement	Travel & Lodging Expenses
6.	Federalist Society	11/07/23-11/08/23	Cambridge, MA	Educational Speaking Engagement	Travel & Lodging Expenses
7.					
8.					

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.			

Name of Person Reporting	Date of Report
Beaton, Benjamin J.	08/10/2024

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		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)	
1.	CCHMC Retirement Plan (H)									
2.	Vanguard Tgt Retire 2045	D	Dividend	M	T					
3.	Roth IRA #1 (H)									
4.	Blackrock Funds Adv SM Cap Core Inst	A	Dividend			Sold	12/19/23	J	A	
5.	Blackrock Funds Emrg Mkts Inst	A	Dividend			Sold	12/19/23	J	A	
6.	Primecap Odyssey Funds Growth Inv	B	Dividend			Sold	12/19/23	K	A	
7.	Primecap Odyssey Funds Aggr Growth Inv	A	Dividend			Sold	12/19/23	J	A	
8.	T. Rowe Price Health Scis I	A	Dividend			Sold	12/19/23	J	A	
9.	Vanguard Intl Growth Admiral	A	Dividend			Sold	12/19/23	J	A	
10.	Vanguard Intl Explorer	A	Dividend			Sold	12/19/23	J	A	
11.	Vanguard FTSE Developed Markets		None	J	T	Buy	12/21/23	J		
12.	Vanguard Extended Market ETF	A	Dividend	J	T	Buy	12/21/23	J		
13.	Vanguard S&P 500 ETF	A	Dividend	K	T	Buy	12/21/23	K		
14.	SPDR IS Emerging Mkts ETF		None	J	T	Buy	12/21/23	J		
15.	SPDR Portfolio S&P 500 ETF		None	J	T	Buy	12/21/23	J		
16.	Roth IRA #2 (H)									
17.	Vanguard Intl Explorer Fd	A	Dividend			Sold	12/20/23	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			

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18.	Blackrock Funds Adv SM Cap Core Inst	A	Dividend			Sold	12/20/23	J	A	
19.	Blackrock Funds Emrg Mkts Inst	A	Dividend			Sold	12/20/23	J	A	
20.	Primecap Odyssey Funds Growth Inv	A	Dividend			Sold	12/20/23	J	A	
21.	Primecap Odyssey Funds Aggr Growth Inv	A	Dividend			Sold	12/20/23	J	A	
22.	T. Rowe Price Health Scis I	A	Dividend			Sold	12/20/23	J	A	
23.	Vanguard Intl Growth Admiral	A	Dividend			Sold	12/20/23	J	A	
24.	Vanguard FTSE Developed Markets		None	J	T	Buy	12/21/23	J		
25.	Vanguard Extended Market ETF	A	Dividend	J	T	Buy	12/21/23	J		
26.	Vanguard S&P 500 ETF	A	Dividend	K	T	Buy	12/21/23	J		
27.	SPDR IS Emerging Mkts ETF		None	J	T	Buy	12/21/23	J		
28.	Charles Schwab Retirement Plan (H)									
29.	Vanguard Instl Trgt Retire 2045 Ins		None			Sold	08/15/23	J	C	
30.	Harbor Capital Appreciation CIT CL		None			Sold	05/12/23	K	E	
31.	Vanguard Equity-Income Adm	A	Dividend			Sold	08/15/23	K	D	
32.	Vanguard Extended Market Index Inst	A	Dividend			Sold	08/15/23	K	E	
33.	American Funds Europacific Growth	A	Dividend			Sold	08/15/23	J	C	
34.	Vanguard Emerging Mkts Stock Idx	A	Dividend			Sold	08/15/23	J	C	

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35. American Funds American Balanced R6	A	Dividend			Sold	08/15/23	K	D	
36. Pimco Total Return A	A	Dividend			Sold (part)	08/15/23	J	C	
37.					Sold	11/10/23	J	A	
38. Harbor Capital Appreciation CIT R		None			Buy	05/12/23	K		
39.					Sold	08/15/23	K	C	
40. Citibank Checking Account		None	J	T					
41. Fifth Third Checking Account	A	Interest	K	T					
42. HealthEquity HSA	A	Interest	J	T					
43. 529 Plan #1 (H)									
44. Vanguard Growth Index		None			Buy (add'l)	03/24/23	J		
45.					Sold	03/28/23	L	D	
46. Vanguard 500 Index		None	K	T	Buy	03/28/23	K		
47. Vanguard Mid-Cap Index		None	K	T	Buy (add'l)	03/24/23	J		
48.					Sold	03/28/23	K	E	
49.					Buy	03/28/23	J		
50. Vanguard Small-Cap Index		None	K	T	Buy (add'l)	03/24/23	J		
51.					Sold	03/28/23	K	E	

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52.					Buy	03/28/23	K		
53. Vanguard Totl Int Stk Index		None	J	T	Buy (add'l)	03/24/23	J		
54.					Sold	03/28/23	J	D	
55.					Buy	03/28/23	K		
56. Vanguard Income		None			Buy (add'l)	03/24/23	J		
57.					Sold	03/28/23	J	C	
58. Vanguard Interest Accumulation		None	L	T	Buy	03/28/23	L		
59. 529 Plan #2 (H)									
60. Vanguard Growth Index		None			Buy (add'l)	01/19/23	J		
61.					Sold	03/28/23	K	E	
62. Vanguard Mid-Cap Index		None	J	T	Buy (add'l)	01/19/23	J		
63.					Sold	03/28/23	K	D	
64.					Buy	03/28/23	J		
65.					Buy (add'l)	04/19/23	J		
66. Vanguard Small-Cap Index		None	K	T	Buy (add'l)	01/19/23	J		
67.					Sold	03/28/23	K	D	
68.					Buy	03/28/23	K		

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69.					Buy (add'l)	04/19/23	J		
70. Vanguard Totl Int Stk Index		None	K	T	Buy (add'l)	01/19/23	J		
71.					Sold	03/28/23	J	C	
72.					Buy	03/28/23	K		
73.					Buy (add'l)	04/19/23	J		
74. Vanguard Income		None	K	T	Buy (add'l)	01/19/23	J		
75.					Sold	03/28/23	J	C	
76.					Buy	03/28/23	K		
77.					Buy (add'l)	04/19/23	J		
78. Vanguard 500 Index		None	K	T	Buy	03/28/23	K		
79.					Buy (add'l)	04/19/23	J		
80. 529 Plan #3 (H)									
81. Vanguard Growth Index		None			Buy (add'l)	01/13/23	J		
82.					Sold	03/28/23	K	D	
83. Vanguard Mid-Cap Index		None	J	T	Buy (add'l)	01/13/23	J		
84.					Sold	03/28/23	K	D	
85.					Buy	03/28/23	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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86.					Buy (add'l)	04/14/23	J		
87. Vanguard Small-Cap Index		None	K	T	Buy (add'l)	01/13/23	J		
88.					Sold	03/28/23	K	D	
89.					Buy	03/28/23	J		
90.					Buy (add'l)	04/14/23	J		
91. Vanguard Totl Int Stk Index		None	K	T	Buy (add'l)	01/13/23	J		
92.					Sold	03/28/23	J	B	
93.					Buy	03/28/23	K		
94.					Buy (add'l)	04/14/23	J		
95. Vanguard Income		None	K	T	Buy (add'l)	01/13/23	J		
96.					Sold	03/28/23	J	B	
97.					Buy	03/28/23	K		
98.					Buy (add'l)	04/14/23	J		
99. Vanguard 500 Index		None	K	T	Buy	03/28/23	K		
100.					Buy (add'l)	04/14/23	J		
101. 529 Plan #4 (H)									
102. Vanguard Growth Index		None			Buy (add'l)	03/09/23	J		

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
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103.					Sold	03/28/23	J	B	
104. Vanguard Mid-Cap Index		None	J	T	Buy (add'l)	03/09/23	J		
105.					Sold	03/28/23	J	B	
106.					Buy	03/28/23	J		
107.					Buy (add'l)	06/09/23	J		
108. Vanguard Small-Cap Index		None	J	T	Buy (add'l)	03/09/23	J		
109.					Sold	03/28/23	J	B	
110.					Buy	03/28/23	J		
111.					Buy (add'l)	06/09/23	J		
112. Vanguard Totl Int Stk Index		None	J	T	Buy (add'l)	03/09/23	J		
113.					Sold	03/28/23	J	A	
114.					Buy	03/28/23	J		
115.					Buy (add'l)	06/09/23	J		
116. Vanguard Income		None	J	T	Buy (add'l)	03/09/23	J		
117.					Sold	03/28/23	J	A	
118.					Buy	03/28/23	J		
119.					Buy (add'l)	06/09/23	J		

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
Beaton, Benjamin J.	08/10/2024

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)	
120. Vanguard 500 Index		None	J	T	Buy	03/28/23	J		
121.					Buy (add'l)	06/09/23	J		
122. Schwab (fka TD Ameritrade) Brokerage (H)									
123. Cash (held in brokerage account)	A	Interest	K	T					
124. iShares Trust Core US AGGBD ETF	B	Dividend	K	T	Buy (add'l)	06/02/23	J		
125.					Sold (part)	07/28/23	J	A	
126.					Sold (part)	12/11/23	J	A	
127. Lattice Strategies TR Hartford MLT ETF		None			Sold	04/17/23	J	A	
128. SPDR Series Trust Portfolio Agrgte ETF	A	Dividend			Buy (add'l)	02/02/23	J		
129.					Buy (add'l)	03/03/23	J		
130.					Buy (add'l)	03/31/23	J		
131.					Buy (add'l)	05/03/23	J		
132.					Sold (part)	06/26/23	J	A	
133.					Sold	07/28/23	J	A	
134. Prime Cap Odyssey Growth		None			Sold	04/14/23	K	A	
135. Prime Cap Odyssey Aggressive Growth	C	Dividend	L	T					
136. Prime Cap Odyssey Stock	B	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
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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
Beaton, Benjamin J.	08/10/2024

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)	
137. Vanguard Mid-Cap Value Index Fd Adm Shs	B	Dividend	L	T					
138. Vanguard Small-Cap Growth Index Fd Adm Shs	A	Dividend	M	T					
139. Vanguard Mid-Cap Growth Index Fd	A	Dividend	M	T					
140. Vanguard Capital Opportunity Fd Adm Shs	C	Dividend	M	T	Sold (part)	05/22/23	K	C	
141. Vanguard Federal Money Market	A	Dividend	J	T	Sold (part)	03/23/23	K	A	
142. Vanguard Short-Term Tax-Exempt Fd Adm Shs	C	Dividend	M	T					
143. IRA #1 (H)									
144. IShares MSCI USA Value	A	Dividend	K	T	Buy	08/25/23	J		
145. Victoryshares US Small	A	Dividend	K	T	Buy	08/25/23	J		
146. IShares MSCI USA MOMNTUM	A	Dividend	K	T	Buy	08/25/23	K		
147. Avantis Emerging Markets	A	Dividend	K	T	Buy	08/25/23	K		
148. Avantis Int'l Small	A	Dividend	J	T	Buy	08/25/23	J		
149. JPMRGN Divsf RT US Mid	A	Dividend	J	T	Buy	08/25/23	J		
150. Hartford Multifactor Dvlpd	A	Dividend	K	T	Buy	08/25/23	K		
151. IShares MSCI USA Quality	A	Dividend	K	T	Buy	08/25/23	K		
152. IShares MSCI USA Min Vol	A	Dividend	K	T	Buy	08/25/23	K		

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
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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

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

Name of Person Reporting	Date of Report
Beaton, Benjamin J.	08/10/2024

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. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Benjamin J. Beaton

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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