AO 10
Rev. 1/2019

FINANCIAL DISCLOSURE REPORT
FOR CALENDAR YEAR 2022

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
Berman, Richard M.	U.S. District Court - S.D.N.Y.	08/11/2023
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**
U.S. District Judge, Senior Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
U.S. District Court 500 Pearl Street New York, NY 10007		

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.		
2.		
3.		
4.		
5.		

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

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

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.		
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.					

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.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2023

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. Apple Inc	A	Dividend	L	T	Buy (add'l)	07/08/22	J		
2. Liberty Media Corp Liberty Cap Cl A	A	Dividend	K	T					
3. LM CBA Equity Income Builder Fund CL A	A	Dividend	K	T					
4. Morgan Stanley Money Market Fund	A	Interest	L	T					
5. US Treasury Inflation Index NTS CPI Non Seasonally	A	Interest	M	T					
6. SPDR S&P 500 ETF Trust	C	Dividend	N	T					
7. Liberty Media Corp Liberty Cap com Ser A		None	K	T					
8. SPDR Gold Trust		None	J	T					
9. Vanguard Total Stock Index	D	Distribution	M	T					
10. Ishares Russell 2000 Index Fund	B	Dividend	M	T					
11. UTS SPDR Trust Ser 1	C	Dividend	L	T					
12. TSASC Inc NY TOB Settlement Asset	C	Interest	L	T					
13. New York ST Urban Dev Corp Rev Personal Income Tax	B	Interest	M	T					
14. T-C Infl Lnkd Bond Rtmt	A	Distribution	K	T					
15. T-C Lifecycle 2020 Rtmt		None	K	T					
16. T-C Lifecycle Rtmt Inc Rtmt	A	Distribution	K	T					
17. Property Indian River County, FL	E	Rent	L	W					

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		

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. SPDR Gold Trust		None	K	T					
19. Ishares TR Dow Jones US	A	Dividend	J	T					
20. Union Pacific corp	A	Dividend	J	T					
21. Rydex ETR TR Index Fund	A	Dividend	J	T					
22. New York State Dorm Auth Pers Inc Tax Rev 2/15/2022	B	Interest	L	T					
23. Spartan Total Market Index	A	Interest	K	T					
24. Spartan Small Cap Index	A	Interest	K	T					
25. Costco Wholesale Crp	A	Dividend	K	T					
26. Goldman Sachs Group Inc	A	Dividend	K	T	Buy (add'l)	07/08/22	J		
27. United States Treasury Bill	B	Interest	M	T					
28. Liberty Spinco Inc Cl A	A	Dividend	J	T					
29. Invisa Inc	A	Dividend	J	T					
30. Stratasys LTD	A	Dividend	J	T					
31. Vanguard S&P 500 ETF	A	Dividend	K	T					
32. Netflix	A	Dividend	J	T					
33. Vanguard TTL Stk Mkt ETF	A	Dividend	K	T					
34. US Treasury Bill 3/16/2017	A	Interest	L	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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VII. INVESTMENTS and TRUSTS -- *income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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35. Amazon Com Inc	A	Dividend	K	T	Buy (add'l)	01/03/22	J		
36. Dunkirk NY 3/15/2031	A	Interest	M	T					
37. United States Treasury Bill 7/5/18	A	Interest	M	T					
38. European Monetary Unit Savings Dep	A	Interest	J	T					
39. Time Warner Inc	A	Dividend	J	T					
40. US Treasury Bill Matures 10/11/18	A	Interest	M	T					
41. US Treasury Bill Matures 11/15/18	A	Interest	L	T					
42. US Treasury Bill Matures 3/28/19	A	Interest	L	T					
43. US Treasury Bill Matures 1/17/19	A	Interest	M	T					
44. US Treasury Bill Matures 4/11/19	A	Interest	M	T					
45. US Treasury Bill 7/5/18	A	Interest	N	T					
46. Yonkers NY Serial Genl Oblig Ser A 9/1/24	A	Interest	K	T					
47. Discovery Inc Ser A	A	Dividend	J	T					
48. US Treasury Bill 10/11/18	A	Interest	M	T					
49. US Treasury Bill 1/17/19	A	Interest	M	T					
50. US Treasury Bill 4/11/19	A	Interest	M	T					
51. Utility Debt Secur Auth 12/15/25	A	Interest	M	T					

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52. NYS Dorm Auth School 10/1/25	A	Interest	M	T					
53. Bridgehampton NY UFSD 3/15/24	A	Interest	M	T					
54. Bay Shore NY UFSD 1/15/24	A	Interest	L	T					
55. Battery Park Auth Rev A 11/1/28	A	Interest	L	T					
56. Yonkers NY 9/1/24	A	Interest	L	T					
57. Triborough Bridge Tunnel ref B 11/15/24	A	Interest	L	T					
58. AT&T Inc	A	Dividend	J	T					
59. Visa Inc	A	Dividend	J	T	Redeemed (part)	05/02/22	J	A	
60. Schenectady CN BE 3125 42FB15	A	Interest	L	T					
61. Us Treasury Bill Mature 7/9/20 Issued 1/9/20	B	Interest	M	T					
62. Microsoft Corp	A	Dividend	K	T	Buy (add'l)	07/08/22	J		
63. Berkshire Hathaway	A	Dividend	K	T					
64. Metropolitan Trans Auth Issued 12/14/17 Matures 11/15/25	A	Interest	M	T					
65. Metropolitan Trans Auth Issued 8/20/12 Matures 11/15/2030	A	Interest			Redeemed	11/15/22	L	A	
66. Lululemon Athetica Inc	A	Dividend	K	T					
67. Zoom Video Communications	A	Dividend	J	T					
68. Vanguard Mid Cap Growth	A	Dividend	J	T					

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69. Vanguard Growth	A	Dividend	J	T					
70. Vanguard Prime MMKT	A	Dividend	M	T					
71. Unitedhealth GP	A	Dividend	J	T					
72. Bank of America Corp	A	Dividend	J	T					
73. Johnson & Johnson	A	Dividend	J	T					
74. General Motors	A	Dividend	J	T					
75. Citigroup Inc	A	Dividend	J	T					
76. Brandes International EQ	A	Dividend	K	T					
77. Facebook Inc	A	Dividend	K	T					
78. Chevron Corp	A	Dividend			Sold	01/26/22	K	A	
79. TJX COS Inc	A	Dividend	J	T					
80. Amgen Inc	A	Dividend	J	T					
81. Wells Fargo & Co	A	Dividend	J	T					
82. Qualcomm Inc	A	Dividend	J	T	Buy (add'l)	07/08/22	J		
83. Home Depot Inc	A	Dividend	J	T					
84. Broadcom Inc	A	Dividend	J	T					
85. Blackstone Group	A	Dividend	J	T					

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86. Legg Mason Clearbridge Sel I	A	Dividend	K	T					
87. Walt Disney Co Hldg	A	Dividend	J	T					
88. Black Knight Inc	A	Dividend	J	T					
89. Blackline Inc	A	Dividend	J	T					
90. Brooks-Automation Inc	A	Dividend	J	T					
91. Fastenal Co	A	Dividend	J	T					
92. Mastercard Inc	A	Dividend	J	T	Buy (add'l)	01/03/22	J		
93. Tractor Supply Co	A	Dividend	J	T					
94. Tyler Technologies Inc	A	Dividend	J	T					
95. Verisk Analytics Inc	A	Dividend	J	T	Sold (part)	01/07/22	J	A	
96.					Sold (part)	01/10/22	J	A	
97. Walgreens Boots Alliance Inc	A	Dividend	J	T					
98. Waste Connections Inc	A	Dividend	J	T					
99. Abbott Laboratories	A	Dividend	J	T					
100. Accenture PLC Ireland	A	Dividend	J	T					
101. Air Prod & Chem	A	Dividend	J	T					
102. Alphabet Inc	A	Dividend	J	T	Buy (add'l)	01/03/22	J		

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103. American Tower Reit	A	Dividend	J	T					
104. Ameriprise Fincl Inc	A	Dividend	J	T					
105. Amphenol Corp	A	Dividend	J	T	Sold (part)	01/04/22	J	A	
106. Ansys Inc	A	Dividend	J	T					
107. Aptargroup Inc	A	Dividend	J	T					
108. Aptiv PLC	A	Dividend	J	T					
109. Assurant Inc	A	Dividend	J	T					
110. Atlassian Corp	A	Dividend	J	T					
111. Automatic Data Processing Inc	A	Dividend	J	T					
112. Becton Dickinson & Co	A	Dividend	J	T					
113. Bright Horizons Family Solutions	A	Dividend	J	T					
114. Broadridge Fin Solu LLC	A	Dividend	J	T					
115. Brooks Automation Inc	A	Dividend	J	T					
116. Cable One Inc	A	Dividend	J	T					
117. CDW Corporation	A	Dividend	J	T					
118. Costar Group Inc	A	Dividend	J	T					
119. Coupa Software Inc	A	Dividend	J	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

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120. Dollar Gen Corp	A	Dividend	J	T					
121. Ecolab Inc	A	Dividend	J	T					
122. Fidelity Natl Information	A	Dividend	J	T					
123. Gilead Science	A	Dividend	J	T					
124. Glacier Bancorp Inc	A	Dividend	J	T					
125. Guidewire Software Inc	A	Dividend	J	T					
126. Heico Corp	A	Dividend	J	T					
127. Idexx Labs	A	Dividend	J	T					
128. Ill Tool Works Inc	A	Dividend	J	T					
129. Illumina Inc	A	Dividend	J	T					
130. Intuit Inc	A	Dividend	J	T					
131. Jack Henry & Assoc Inc	A	Dividend	J	T					
132. Kimberly Clark Corp	A	Dividend	J	T					
133. Markel Corp	A	Dividend	J	T					
134. Masimo Corporation	A	Dividend	J	T					
135. Mc Cormick and Co	A	Dividend	J	T					
136. McDonalds Corp	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		
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
Berman, Richard M.	08/11/2023

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)
137. Merck & Co Inc	A	Dividend	J	T					
138. Nexterra Energy Inc	A	Dividend	J	T					
139. Nike Inc	A	Dividend	J	T	Buy (add'l)	01/04/22	J		
140. Okta Inc	A	Dividend	J	T	Sold (part)	07/08/22	J	A	
141. Old Dominion Freight Line	A	Dividend	J	T					
142. Regeneron Pharmaceuticals Inc	A	Dividend	J	T					
143. Republic Services Inc	A	Dividend	J	T					
144. Roper Technologies Inc	A	Dividend	J	T					
145. Sherwin Williams Company	A	Dividend	J	T	Sold (part)	01/12/22	J	A	
146. Snap On Inc	A	Dividend	J	T					
147. Stericycle Inc	A	Dividend	J	T					
148. Steris PLC	A	Dividend	J	T					
149. Stryker Corp	A	Dividend	J	T					
150. Teleflex Inc	A	Dividend	J	T					
151. Tesla Inc	A	Dividend	J	T					
152. Texas Instruments	A	Dividend	J	T					
153. Thermo Fisher Scientific	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		
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
Berman, Richard M.	08/11/2023

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)
154. Trade Desk Inc Class A	A	Dividend	J	T					
155. Transdigm Group Inc	A	Dividend	J	T					
156. Twilio Inc	A	Dividend	J	T					
157. Verizon Communications	A	Dividend	J	T					
158. WEC Energy Group Inc	A	Dividend	J	T					
159. Xcel Energy Inc	A	Dividend	J	T					
160. Zoetis Inc	A	Dividend	J	T					
161. ABB Ltd	A	Dividend	J	T					
162. Advanced Micro Devices	A	Dividend	J	T					
163. Adyen N V Unsponsored	A	Dividend	J	T					
164. Amgen inc	A	Dividend	J	T					
165. Ball Corporation	A	Dividend	J	T					
166. Biomarin Pharmac	A	Dividend	J	T					
167. Blackstone Inc	A	Dividend	J	T	Buy (add'l)	07/08/22	J		
168. Calavo Growers Inc	A	Dividend	J	T					
169. Calif Water Svc GP Del	A	Dividend	J	T	Sold (part)	01/04/22	J	A	
170. Carvana Co Cl A	A	Dividend			Sold	12/08/22	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		

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)
171. Chewy Inc	A	Dividend	J	T					
172. Clorox Co	A	Dividend	J	T	Sold (part)	12/08/22	J	A	
173. Coca Cola Co	A	Dividend	J	T					
174. Commerce Bancshares	A	Dividend	J	T					
175. Cooper Co Inc New	A	Dividend	J	T	Buy (add'l)	01/07/22	J		
176.					Buy (add'l)	01/10/22	J		
177. Costco Wholesale Corp New	A	Dividend	J	T					
178. Coterra Energy Inc	A	Dividend	J	T					
179. Cousins PPTYS Inc	A	Dividend			Sold	07/08/22	J	A	
180. Crown Castle Intl Corp	A	Dividend	J	T					
181. Danaher Corporation	A	Dividend	J	T					
182. Sirona Inc	A	Dividend			Sold	12/08/22	J	A	
183. Dexcom Inc	A	Dividend	J	T					
184. Diageo PLC Spon Adr New	A	Dividend	J	T					
185. Essential Utils Inc	A	Dividend			Sold	07/08/22	J	A	
186. Everest Re Group LTD	A	Dividend	J	T					
187. Exact Sciences Corp	A	Dividend			Sold	07/08/22	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	
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Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2023

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)
188. Henkel AG & Co KGAA	A	Dividend	J	T					
189. Intuitive Surgical Inc	A	Dividend	J	T					
190. Kering S A ADR	A	Dividend	J	T					
191. Motorola Solutions Inc	A	Dividend	J	T					
192. Mueller Water Prod Inc Ser A	A	Dividend			Sold	07/08/22	J	A	
193. Northern Trust Corporation	A	Dividend	J	T					
194. Nvidia Corporation	A	Dividend	J	T					
195. Paypal Hldgs Inc	A	Dividend	J	T	Sold (part)	01/13/22	J	A	
196. Phillips 66 Com	A	Dividend	J	T					
197. Reinsurance Group of America	A	Dividend	J	T					
198. Rockwell Automation Inc	A	Dividend	J	T					
199. Ross Stores Inc	A	Dividend	J	T					
200. Salesforce.com Inc	A	Dividend	J	T					
201. Snowflake Inc	A	Dividend	J	T					
202. Synopsys Inc	A	Dividend	J	T					
203. Travelers Companies Inc	A	Dividend	J	T					
204. Twitter Inc	A	Dividend			Sold	10/05/22	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	
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VII. INVESTMENTS and TRUSTS -- *income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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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)
205. Uber Technologies Inc	A	Dividend	J	T					
206. Werner Enterprises Inc	A	Dividend			Sold	07/08/22	J	A	
207. White Mountain GRP Bermuda	A	Dividend	J	T					
208. Workday Inc Cl A	A	Dividend	J	T					
209. Wright Medical Group	A	Dividend	J	T					
210. Xylem Inc Com	A	Dividend	J	T					
211. Abiomed Inc	A	Dividend	J	T	Redeemed (part)	12/28/22	J	A	
212. Adobe Inc	A	Dividend	J	T					
213. Aerojet Rocketdyne Hldgs Inc	A	Dividend	J	T					
214. AirBNB Inc	A	Dividend	J	T					
215. Alcon Inc	A	Dividend	J	T					
216. Align Technology	A	Dividend	J	T					
217. Affirm Hldgs Inc CL A	A	Dividend	J	T					
218. Alleghany CP Delaware	A	Dividend	J	T	Redeemed (part)	10/20/22	J	A	
219. Ametek Inc New	A	Dividend	J	T					
220. Aramark Holdings Corporation	A	Dividend	J	T					
221. ASML Holding NV NY Reg New	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
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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	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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VII. INVESTMENTS and TRUSTS -- *income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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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)
222. Autodesk Inc Delaware	A	Dividend	J	T					
223. Autozone Inc	A	Dividend			Sold	07/08/22	J	A	
224. Avalonbay Comm Inc	A	Dividend	J	T					
225. Avista Corp	A	Dividend			Buy (add'l)	01/04/22	J		
226.					Sold	07/08/22	J	A	
227. Baxter Intl Inc	A	Dividend	J	T					
228. Becton Dickinson & Co Dep REPSTG PFD B	A	Dividend	J	T					
229. Beiersdorf AG Unspons ADR	A	Dividend	J	T					
230. Berkley W R Corp	A	Dividend	J	T					
231. Biogen Inc Com	A	Dividend			Sold	12/08/22	J	A	
232. Biontech SE ADR	A	Dividend			Sold	07/08/22	J	A	
233. Bioventus Inc	A	Dividend			Sold	07/08/22	J	A	
234. Blackstone Group Inc CL A	A	Dividend	J	T	Buy (add'l)	01/03/22	J		
235. Block Inc	A	Dividend	J	T	Sold (part)	01/13/22	J	A	
236. Booking Holdings Inc	A	Dividend	J	T					
237. Boston Properties Inc	A	Dividend	J	T					
238. Cabot Oil & Gas Corp A	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
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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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VII. INVESTMENTS and TRUSTS -- *income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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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)
239. Cal Maine Foods Inc	A	Dividend	J	T					
240. Capital One Financial Corp	A	Dividend	J	T					
241. Charles Schwab New	A	Dividend	J	T					
242. Chipotle Mexican Grill Inc Com	A	Dividend	J	T					
243. Chubb LTD	A	Dividend	J	T	Sold (part)	01/04/22	J	A	
244. Cincinnati Financial Ohio	A	Dividend	J	T					
245. Constellation Brands Inc	A	Dividend	J	T					
246. Corteva Inc	A	Dividend	J	T					
247. Crowdstrike Hldgs Inc CL A	A	Dividend	J	T					
248. Cullen Frost Bankers inc	A	Dividend			Sold	07/08/22	J	A	
249. Deere & Co	A	Dividend	J	T					
250. Docusign Inc	A	Dividend	J	T					
251. East West Bancorp	A	Dividend	J	T					
252. Elanco Animal Health Inc	A	Dividend	J	T					
253. Eli Lilly & Co	A	Dividend	J	T					
254. Equifax Inc	A	Dividend	J	T					
255. Equinix Inc	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

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
Berman, Richard M.	08/11/2023

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)
256. Equity Comwlth Com SH Ben Int	A	Dividend	J	T					
257. Equity Lifestyle Properties	A	Dividend	J	T					
258. Estee Lauder Co Inc CL A	A	Dividend	J	T					
259. Etsy Inc Com	A	Dividend	J	T					
260. Fiserv Inc Wisconsin	A	Dividend	J	T					
261. Freeport-McMoran CL B	A	Dividend	J	T					
262. Gartner Inc	A	Dividend	J	T					
263. GCP Applied Technologies Inc	A	Dividend			Buy (add'l)	01/04/22	J		
264.					Buy (add'l)	01/11/22	J		
265.					Redeemed	09/27/22	J	A	
266. Genl Dynamics Corp	A	Dividend	J	T					
267. Global Payment Inc	A	Dividend	J	T					
268. Godaddy Inc	A	Dividend	J	T					
269. Hartford Fin Sers Grp Inc	A	Dividend	J	T					
270. HCA Healthcare Inc	A	Dividend	J	T					
271. Healthcare Tr Amer Inc Cl A	A	Dividend	J	T					
272. Hubspot Inc	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		
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
Berman, Richard M.	08/11/2023

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)
273. ICU Medical Inc	A	Dividend	J	T					
274. Idacorp Inc	A	Dividend			Sold	07/08/22	J	A	
275. Independent Bk Mass	A	Dividend	J	T					
276. Intersect Ent Inc	A	Dividend			Redeemed	05/16/22	J	A	
277. Johnson Ctls Intl PLC	A	Dividend	J	T					
278. KKR & Co Inc CL A	A	Dividend	J	T					
279. Lam Research Corporation	A	Dividend	J	T					
280. Lennar Corporation	A	Dividend	J	T					
281. Liberty Global PLC CL A	A	Dividend	J	T					
282. Lowes Companies	A	Dividend	J	T					
283. Lululemon Athletica Inc	A	Dividend	J	T					
284. LVMH Moet Hennessy Louis Vuitt	A	Dividend	J	T	Buy (add'l)	01/06/22	J		
285. Marriott Intl Inc New CL A	A	Dividend			Sold	07/08/22	J	A	
286. Martin Marietta Materials	A	Dividend	J	T					
287. Match Group Inc	A	Dividend	J	T					
288. Mckesson Corp	A	Dividend	J	T					
289. Medtronic PLC Shs	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

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
Berman, Richard M.	08/11/2023

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)
290. Meta Platforms Inc	A	Dividend	J	T					
291. Metlife Incorporated	A	Dividend	J	T					
292. Metlife Inc 4.75% F	A	Dividend	J	T					
293. Metlife Inc 5.62%	A	Dividend	J	T	Buy (add'l)	01/04/22	J		
294. Microchip Technologies Inc	A	Dividend	J	T					
295. Michelin Compagnie	A	Dividend			Sold	12/08/22	J	A	
296. Mission Produce Inc	A	Dividend			Sold	07/08/22	J	A	
297. Mitsubishi UFJ Fincl Grp	A	Dividend	J	T					
298. Moderna Inc	A	Dividend			Sold	12/08/22	J	A	
299. Mongodb Inc CL A	A	Dividend	J	T					
300. Monmouth RL Est Invt CP A	A	Dividend			Redeemed	02/28/22	J	A	
301. Monster Beverage Corp	A	Dividend	J	T					
302. Morgan Stanley	A	Dividend	J	T	Sold (part)	07/11/22	J	A	
303. MSCI Inc	A	Dividend	J	T					
304. MTS Systems Corp	A	Dividend	J	T					
305. Nestle Spon ADR	A	Dividend	J	T	Sold (part)	12/08/22	J	A	
306. Northrop Grumman CP	A	Dividend	J	T	Sold (part)	01/11/22	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
Berman, Richard M.	08/11/2023

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)
307. Oracle Corp	A	Dividend	J	T					
308. O'Reilly Automotive Inc	A	Dividend	J	T					
309. Parker Hannifin Corp	A	Dividend	J	T					
310. Pennon Group PLC	A	Dividend	J	T					
311. PNC Finl Svcs	A	Dividend	J	T					
312. Procter & Gamble	A	Dividend	J	T					
313. RPM Inc	A	Dividend	J	T					
314. Roblox Corp CL A	A	Dividend	J	T					
315. S&P Global Inc	A	Dividend	J	T					
316. Sanderson Farms	A	Dividend			Redeemed	07/25/22	J		
317. Seagen Inc	A	Dividend			Sold	07/08/22	J		
318. Sea Limited ADR	A	Dividend	J	T					
319. Seattle Genetics Inc	A	Dividend	J	T					
320. Severn Trent PLC Spon ADR	A	Dividend	J	T					
321. Shopify Inc	A	Dividend	J	T					
322. SJW Group	A	Dividend	J	T					
323. Smith & Nephew PLC	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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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)
324. Snap Inc	A	Dividend	J	T					
325. Sony Corp	A	Dividend	J	T					
326. Steris PLC	A	Dividend	J	T					
327. Sun Communities Inc	A	Dividend			Sold	12/08/22	J	A	
328. SVB Financial Group	A	Dividend	J	T					
329. Taiwan Smcndctr MFG Co	A	Dividend	J	T					
330. Tapestry Inc	A	Dividend	J	T					
331. Target Corp	A	Dividend	J	T					
332. TD Ameritrade Holding Corp	A	Dividend	J	T					
333. Townebank VA	A	Dividend	J	T	Buy (add'l)	01/06/22	J		
334. Trane Technologies PLC	A	Dividend			Sold	12/08/22	J	A	
335. Transunion	A	Dividend	J	T					
336. Tyson Foods Inc	A	Dividend			Sold	12/08/22	J	A	
337. UMB Financial Corp	A	Dividend	J	T					
338. United Utilities Group PLC	A	Dividend	J	T					
339. Universal Health Services	A	Dividend	J	T					
340. US Bancorp	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	
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Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2023

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)
341. US Bancorp PFD B	A	Dividend	J	T					
342. US Bancorp 6.5% FLTS 1/15/22	A	Interest			Redeemed	01/18/22	J	A	
343. US Concrete Inc	A	Dividend	J	T					
344. Valley Natl Bancorp	A	Dividend	J	T					
345. Varian Medical Sys Inc	A	Dividend	J	T					
346. Wayfair Inc	A	Dividend	J	T					
347. Zimmer Biomet Hldgs Inc	A	Dividend			Sold	12/08/22	J	A	
348. Zoominfo Technologies Inc	A	Dividend	J	T					
349. Zynga Inc	A	Dividend			Redeemed	05/24/22	J	A	
350. Lord Abbett Intl Focused	A	Dividend			Sold (part)	07/28/22	M	A	
351.					Sold	12/07/22	L	A	
352. Mainstay McKay NY Txfr	A	Dividend			Sold (part)	10/26/22	L	A	
353.					Sold	12/07/22	L	A	
354. Mainstay McKay Hgyld MU Bd A	A	Dividend	K	T	Sold (part)	06/22/22	K	A	
355.					Sold (part)	07/21/22	N	A	
356.					Sold (part)	07/28/22	L	A	
357.					Sold (part)	08/11/22	M	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	
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Name of Person Reporting	Date of Report
Berman, Richard M.	08/11/2023

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)
358. Invesco S&P 500 Equal Weight	A	Dividend	J	T					
359. Clearbridge Value Trust I	A	Dividend	L	T					
360. Anheuser Busch Inbev	A	Dividend	J	T					
361. Comcast Corp	A	Dividend	J	T					
362. Schlumberger	A	Dividend	J	T					
363. Viacomcbs Inc	A	Dividend	K	T					
364. Lord Abbett Short Duration	A	Dividend	K	T					
365. BNY Mellon SM/MD Cap GW I	A	Dividend	J	T					
366. CDN Pacific RY LTD	A	Dividend	J	T					
367. Exxon Mobil Corp	A	Dividend	J	T					
368. Nuance Mid Cap Value	A	Dividend	J	T					
369. Southwest Airlines	A	Dividend	J	T					
370. Synchrony Financial	A	Dividend	J	T	Buy (add'l)	01/03/22	J		
371. Atmos Energy Corp	A	Dividend	J	T					
372. Carrier Global Corporation	A	Dividend	J	T					
373. Sitcone Landscapre Supply Inc	A	Dividend	J	T					
374. Sprout Social Inc	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	
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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
Berman, Richard M.	08/11/2023

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

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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)
375. T Rowe Price Group Inc	A	Dividend	J	T					
376. VF Corp	A	Dividend	J	T					
377. WNS Holding Limited	A	Dividend	J	T					
378. Workiva Inc Cl A	A	Dividend	J	T	Buy (add'l)	01/12/22	J		
379. Willscot Mobile Mini Holdings	A	Dividend	J	T					
380. Warner Bros Discovery	A	Dividend	J	T	Buy	06/17/22	J		
381. New York NY Genl Oblig Ser A 8-1-2031	A	Interest	L	T	Buy	07/21/22	L		
382. Metropolitan Trans Auth 5% 11-15-2030	A	Interest	M	T	Buy	07/21/22	M		
383. East Greenbush NY 3.5% 8-1-2037	A	Interest	M	T	Buy	07/22/22	M		
384. Rotterdam NY 4$ 6-15-2040	A	Interest	M	T	Buy	07/28/22	M		
385. Metropolitan Transportation Authority 5% 11-15-2034	A	Interest	L	T	Buy	08/05/22	L		
386. New York NYC Hsg Dev Corpmultifam Green 3.75% 11-1-2037	A	Interest	M	T	Buy	08/11/22	M		
387. Port Auth NY & NJ Consolidated Rev 4% 7-15-2036	A	Interest	L	T	Buy	10/26/22	L		
388. Hudson Yds Infrastructure Corp 4% 2-15-2044	A	Interest	M	T	Buy	12/07/22	M		
389. New York NY 4% 8-1-2042	A	Interest	M	T	Buy	12/22/22	M		
390. Veeva Sys Inc	A	Dividend	J	T	Buy	01/10/22	J		
391. Vulcan Materials Co	A	Dividend	J	T	Sold (part)	01/12/22	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	
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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)
392.									
393.									
394.									
395.									
396.									
397.									
398.									
399.									

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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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		

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

The 2021 report mistakenly had the following stocks as completely sold when they were not.

Line 169 - Calif Water Svc GP Del
Line 243 Chubb LTD
Line 235 - Block Inc
Line 59 - Visa Inc
Line 187 - Exact Sciences Corp
Line 274 - Idacorp Inc
Line 185 - Essential Utils Inc
Line 296 - Mission Produce Inc
Line 317 - Seagen Inc
Line 316 - Sanderson Farms
Line 204 - Twitter Inc
Line 182 - Dentsply Sirona Inc
Line 170 - Carvana Inc

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Berman, Richard M.	08/11/2023

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/ Richard M. Berman**

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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