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
Bolton, Susan R.	U.S. District Court, Arizona	4/21/2022
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
U.S. District Judge - Senior	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
401 W. Washington St., SPC 50 Suite 522 Phoenix, AZ 85003		

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.	
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. 1989	Arizona Elected Officials Retirement Plan (pension plan from prior employment as a state court judge)
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	Arizona Elected Officials Retirement Plan	$74,169.00
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.		
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.	Merrill Lynch Single Premium Life	Cash value loan	J
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Bolton, Susan R.	4/21/2022

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.	Bank of America cash-equivalent	A	Interest	M	T					
2.	Merrill Lynch Single Premium Life-Insurance		None	J	T					
3.	U.S. Savings Bonds		None	O	T					
4.	TA Retirement Plus Annuity(variable)(H)		None							
5.	--AB GLBL THMTC GR PRT			L	T					
6.	--Blackrock High Yield			L	T					
7.	--BLK Basic Value VI			L	T					
8.	--BLK GLobal Alloc VI			L	T					
9.	--BR ADV US TTL MKT VI			K	T					
10.	--Invesco VI Core Eqty			L	T					
11.	Transamerica Landmark Annuity (variable) (H)		None							
12.	--TA Aegon High Yield Bond			J	T					
13.	--Fidelity-VIP Contrafund Portfolio			J	T					
14.	--Fidelity-VIP Mid Cap Portfolio			J	T					
15.	--TA Morgan Stanley Capital Growth			M	T					
16.	--TA Asset Allocation - Moderate			K	T					
17.	--AB Growth and Income Portfolio			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			

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☐ 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)	
18. Allianz Franklin-Annuity (variable)(H)		None							
19. --AZL FIAM Mult Strategy CL1			J	T	Buy	06/18/21	J		
20. -- AZL Moderate Income Strategy			J	T	Buy	06/18/21	J		
21. --AZL MSCI Gbl Equity Index			J	T	Buy	06/18/21	J		
22. --AZL Small Cap Index			J	T					
23. --AZL Mid Cap Index			J	T					
24. --Templeton Growth VIP Fund					Sold	06/18/21	J	A	
25. --AZL International Index			J	T					
26. --AZL Russell 1000 Index			J	T					
27. --AZL T.Rowe Price Capital App			J	T					
28. --BlackRock Global Allocation					Sold	06/18/21	J	A	
29. --Franklin Income VIP Fund					Sold	06/18/21	J	A	
30. Keyport Keyannuity (fixed rate)	D	Interest	N	T					
31. Keyport Keyannuity (fixed rate)	C	Interest	L	T					
32. IShares IBoxx$ High Yield	C	Interest	L	T					
33. IShares JPMorgan EM Bond	C	Interest	M	T					
34. Schwab U.S. Tips	C	Interest	L	T					

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
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35. Sector SPDR Utilites	B	Dividend	L	T					
36. Vanguard Short-Term	B	Interest	M	T					
37. IShares MBS	B	Dividend	M	T					
38. IShares Core 1-5 Year	B	Dividend	M	T					
39. IRA #1 (H)									
40. --IShares MSCI INTL QUALTY	B	Dividend	L	T					
41. --Sector SPDR Energy	C	Dividend	L	T					
42. --Vanguard World FD SHS	A	Dividend	L	T					
43. --CD Morgan Stanley Bank	B	Interest	M	T					
44. --CD Wells Fargo Natl Bank	B	Interest	M	T					
45. --Invesco Aerospace	A	Dividend	M	T					
46. --IShares Edge MSCI MID VOL	B	Dividend	L	T					
47. --Vanguard Growth Index Fund	A	Dividend	J	T					
48. --Total Stock Mrt Index Adm	A	Dividend	J	T					
49. --Berkshire BK CD	C	Interest			Redeemed	04/15/21	M		
50. --BMW BK CD	C	Interest	M	T					
51. --Sally Mae BK CD	C	Interest	M	T					

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52. --Ally Bank CD	B	Interest	M	T					
53. --Morgan Stanley PVT BK CD	C	Interest	M	T					
54. --Goldman Sachs BK CD	A	Interest	K	T					
55. --Goldman Sachs BK CD	B	Interest	L	T					
56. --American Express Bank CD	B	Interest			Redeemed	05/10/21	L		
57. --Verizon Communications	C	Dividend	L	T					
58. --Bank of America NA cash-equivalent	A	Interest	N	T					
59. --Pepsico common stock	C	Dividend	M	T					
60. --Yum Brands common stock	A	Dividend	K	T					
61. --Yum China Holdings, Inc	A	Dividend	J	T					
62. --Invesco OPNHMR Global	A	Dividend	J	T					
63. --Motorola Solutions	A	Dividend	J	T					
64. --Vodafone common stock	A	Dividend	J	T					
65. --Blackrock Global Mutual Fund	B	Dividend	M	T					
66. --Wal-Mart common stock	A	Dividend	L	T					
67. --Invesco QQQ	A	Dividend	M	T					
68. --IShares Russell 1000	B	Dividend	M	T					

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69. --IShares Russell Midcap	A	Dividend	M	T					
70. --IShares S&P Smallcap 500	A	Dividend	L	T					
71. --IShares Edge MSCI Qual	B	Dividend	M	T					
72. --Vanguard Small Cap Value	A	Dividend	L	T					
73. --Vanguard Value ETF	C	Dividend	M	T					
74. --Vanguard Dividend Appreciation ETF	C	Dividend	M	T					
75. --Vanguard Mid-Cap Val Idx	B	Dividend	M	T					
76. U.S. Savings Bonds	E	Interest			Redeemed	11/05/21	L		
77. U.S. Savings Bonds	E	Interest			Redeemed	11/05/21	K		
78. US Savings Bonds		None	K	T					
79. Bank of America Dep Account Preferred cash-equivalent	B	Interest	L	T					
80. IRA #2 (H)									
81. --Vanguard Total Bond Mkt	A	Dividend	K	T					
82. --Vanguard Total Intl. Bond	A	Dividend	K	T					
83. --Vanguard Total Int Stock	C	Dividend	M	T					
84. --Vanguard TTL STK MKT	B	Dividend	M	T					
85. --Invesco Premium US Government MNY	A	Interest			Sold	10/29/21	J		

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86. --Morgan Stanley Bank cash-equivalent	A	Interest	J	T					
87. IShares Global Tech	A	Dividend	L	T					
88. Invesco Buy Back	A	Dividend	K	T					
89. Vanguard Value	B	Dividend	L	T					
90. Vanguard Growth	A	Dividend	L	T					
91. Vanguard FTSE Allworld	B	Dividend	K	T					
92. Allianz Annuity (fixed rate)	E	Distribution	K	T					
93. IShares Core S&P Small	B	Dividend	L	T					
94. IShares 1-3 year	A	Dividend	M	T					
95. SPDR S&P mid-cap 400	A	Dividend	K	T					
96. SPDR S&P 500	A	Dividend	L	T					
97. Vanguard FTSE Emerging	A	Dividend	K	T					
98. Vanguard Dividend Appreciation ETF	B	Dividend	L	T					
99. First TR NASQ100	A	Dividend	M	T					
100. Invesco S&P 500 Equal	A	Dividend	K	T					
101. IShares Core S&P small	A	Dividend	L	T					
102. IShares Russell mid-cap	A	Dividend	K	T					

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103. IShares MSCI EAFE	A	Dividend	J	T					
104. IShares Global Tech	A	Dividend	L	T					
105. IShares 1-3 year	A	Dividend	M	T					
106. IShares MSCI Emerging	A	Dividend	J	T					
107. IShares Russell 2000	A	Dividend	K	T					
108. Invesco Buy Back	A	Dividend	L	T					
109. SPDR S&P mid-cap 400	A	Dividend	L	T					
110. SPDR S&P 500	B	Dividend	M	T					
111. Vanguard Value	B	Dividend	L	T					
112. Vanguard Growth	A	Dividend	M	T					
113. Vanguard FTSE Emerging	A	Dividend	K	T					
114. Vanguard Dividend	B	Dividend	M	T					
115. Vanguard FTSE All World	B	Dividend	K	T					
116. Vanguard FTSE Developed	B	Dividend	K	T					
117. Invesco QQQ Trust	A	Dividend	L	T					
118. Invesco S&P 500 Quality	A	Dividend	K	T					
119. Marcus by Goldman Sacks CD	A	Interest	L	T					

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Name of Person Reporting	Date of Report
Bolton, Susan R.	4/21/2022

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. MidFirst Bank MM	A	Interest	L	T					
121. Marcus by Goldman Sacks CD	A	Interest	M	T	Buy	05/11/21	L		

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
Bolton, Susan R.	4/21/2022

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

Part VII: I cannot specifically list the amount of income earned during the reporting period for my annutities because none of the annuity companies provided detailed income information to me.

Name of Person Reporting	Date of Report
Bolton, Susan R.	4/21/2022

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/ Susan R. Bolton

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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