AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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
Boom, Claria H.	U.S. District Court for the ED and WD of Kentucky	09/25/2023
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**
United States District Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
101 Barr St. Lexington, KY 4057		

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	Transylvania University Board of Regents
2.	Member	Jasper H. Properties, LLC
3.	Trustee	Claria Horn Boom Revocable Trust
4.	Member	NJC Property, LLC
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.			
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.	12//31/22	[redacted] Buzz Oates Construction, Wages
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.	Old National Bank	Mortgage of DKBB, Properties 2, Capstone 18%	L
2.	Republic Bank & Trust	Mortgage on investment property, Waller 18%	M
3.	Sterling Bank	Condo 50% mortgage, Oakland	L
4.			
5.			

Name of Person Reporting	Date of Report
Boom, Claria H.	09/25/2023

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.	Central Bank Checking Account	A	Interest	K	T					
2.	Union Bank Money Market	D	Interest	P1	T					
3.	Charles Schwab Bank Deposit Account	A	Interest	N	T					
4.	Campbell & Kenton Cnty KY Rev	B	Interest			Sold	08/01/22	K	A	
5.	Dayton KY Indpt Sch Dist Fin Co Rev		None	K	T	Buy	11/15/22	K		
6.	Fayette Cnty KY Sch Dist Fin Corp Rev	B	Interest	K	T					
7.	Glasgow KY Elec PltBrd Util	A	Interest	K	T	Buy	10/21/22	K		
8.	Greenville KY GO	B	Interest	K	T					
9.	Jefferson Cnty KY Sch Dist Ser A Rev	B	Interest			Sold	10/01/22	K	A	
10.	KY Infrastructure Auth R	B	Interest	K	T					
11.	KY St Turnpike Auth Ref Rev		None	K	T	Buy	10/21/22	K		
12.	Lexington Fayette Urban Cnty KY Ref GO	B	Interest			Sold	09/01/22	K	A	
13.	Louisville & Jefferson Cnty Ky GO	B	Interest			Sold	12/01/22	K	A	
14.	Louisville & Jefferson Cnty KY Met Swr Dist Rev	B	Interest	K	T					
15.	Louisville & Jefferson Cnty KY	A	Interest	K	T	Buy	07/11/22	K		
16.	Marshall Cnty KY Sch Dist Fin	B	Interest	K	T					
17.	Morehead St Univ KY Gen Rcpts	B	Interest			Sold	10/01/22	K	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. Murray KY St Univ Gen Recpts REv		None			Sold	01/28/22	K	A	
19. Paducah KY GO	B	Interest	K	T					
20. Scott Cnty KY Sch Dist Fin Corp Rev	B	Interest	K	T					
21. Univ of KY Gen Recpts Rev	B	Interest	K	T					
22. Warren Cnty KY GO	A	Interest			Sold	06/01/22	K	A	
23. Winchester KY Util Sys Rev	B	Interest	L	T					
24. Apple Inc	B	Dividend	M	T	Sold (part)	04/05/22	J	D	
25.					Buy (add'l)	08/05/22	J		
26.					Sold (part)	08/08/22	M	F	
27.					Buy (add'l)	08/10/22	J		
28. AbbVie Inc	D	Dividend	M	T	Sold (part)	05/05/22	K	D	
29.					Sold (part)	07/19/22	J	D	
30.					Sold (part)	08/08/22	K	D	
31. AmerisourceBergen	A	Dividend			Buy	05/05/22	K		
32.					Buy (add'l)	05/24/22	J		
33.					Sold	08/08/22	K	A	
34. Abbott Laboratories	A	Dividend	J	T	Buy (add'l)	04/19/22	K		

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2 Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

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35.					Sold (part)	08/08/22	K	A	
36.					Sold (part)	09/15/22	J	A	
37.					Buy (add'l)	10/18/22	J		
38. IShares MSCI ACWI ex-US Index Fund	A	Dividend	J	T					
39. Adobe Systems		None	L	T					
40. Analog Devices	A	Dividend	K	T	Sold (part)	08/08/22	K	E	
41. IShares Core Total U.S. Bond Mkt ETF	B	Dividend	L	T	Buy (add'l)	11/21/22	K		
42. Air Liquide - SA	A	Dividend			Sold	07/21/22	J		
43. Arthur J. Gallagher & Co	A	Dividend	K	T					
44. Applied Materials	A	Dividend	J	T	Sold (part)	08/08/22	K	A	
45. Ametek	A	Dividend			Sold (part)	03/01/22	K	C	
46.					Sold	03/17/22	J	B	
47. Amgen	B	Dividend	K	T					
48. Ameriprise Financial	B	Dividend	M	T					
49. Amazon		None			Sold (part)	01/13/22	K	A	
50.					Sold (part)	08/08/22	K	D	
51.					Sold (part)	11/02/22	K	A	

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52.					Sold	12/13/22	K	A	
53. Autonation		None	J	T	Buy (add'l)	06/14/22	J		
54.					Sold (part)	08/08/22	K	D	
55. AonCorp		None			Sold	01/28/22	J	B	
56. Broadcom LTD	B	Dividend	K	T	Sold (part)	02/14/22	K	D	
57.					Sold (part)	08/08/22	K	D	
58. Avery Dennison Corp	B	Dividend	L	T	Sold (part)	08/08/22	K	D	
59. AXA-UAP SponsADR		None	J	T	Buy	05/26/22	J		
60. Boeing		None	K	T					
61. Best Buy	B	Dividend	J	T	Buy (add'l)	02/14/22	K		
62.					Sold (part)	06/14/22	K	A	
63.					Buy (add'l)	07/20/22	K		
64.					Sold (part)	08/08/22	K	A	
65. Barclays PLCADR	A	Dividend	J	T	Buy	02/25/22	J		
66. BHPBilliton Ltd-SponsoredADR	A	Dividend	J	T	Buy	03/21/22	J		
67.					Sold (part)	09/16/22	J	A	
68.					Buy (add'l)	10/20/22	J		

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69. BlackRock	A	Dividend	K	T					
70. Bristol-Meyers Squibb	B	Dividend	K	T					
71. BNP Paribas-ADR	A	Dividend	J	T	Buy	01/13/22	J		
72.					Sold (part)	07/28/22	J	A	
73.					Buy (add'l)	08/30/22	J		
74. Brown and Brown	A	Dividend			Sold	08/08/22	K	A	
75. Blackstone Inc	A	Dividend			Buy (add'l)	04/22/22	J		
76.					Sold	08/08/22	K	A	
77. Boston Properties	A	Dividend			Sold	08/08/22	J	A	
78. Carrier Global Corp Ordinary Shares	A	Dividend	J	T	Sold (part)	08/03/22	K	D	
79. Celanese Corp Series A	A	Dividend			Sold	08/03/22	J	A	
80. DF Industries Holdings	A	Dividend			Buy	02/25/22	J		
81.	A				Sold	08/08/22	K	C	
82. Ctitzens Financial Group Inc.	B	Dividend	K	T					
83. Charter Communications		None			Buy (add'l)	01/25/22	J		
84.					Sold	06/08/22	K	A	
85. Comcast CL A	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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86. CMS Energy	A	Dividend	K	T					
87. Canadian Natural Resources	A	Dividend	J	T	Sold (part)	04/29/22	J	C	
88.					Sold (part)	12/05/22	J	B	
89. Capital One Financial	A	Dividend			Sold (part)	08/05/22	K	A	
90.					Sold	08/10/22	J	A	
91. Columbia Banking	B	Dividend	L	T					
92. Salesforce.com		None			Sold (part)	02/22/22	J	A	
93.					Sold	08/08/22	K	A	
94. Cisco Systems	C	Dividend	L	T	Buy (add'l)	06/14/22	J		
95.					Sold (part)	08/08/22	K	A	
96. Coterra Energy	C	Dividend	K	T	Sold (part)	08/08/22	K	D	
97. Corteva Inc	A	Dividend	J	T					
98. Central Valley Community Bancorp	B	Dividend	L	T					
99. Chevron Corp	C	Dividend	L	T	Sold (part)	08/08/22	K	D	
100. Dana Inc	A	Dividend			Sold (part)	02/24/22	J	A	
101.					Sold (part)	02/25/22	J	A	
102.					Sold (part)	02/28/22	J	A	

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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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103.					Sold	03/16/22	J	A	
104. Dassault Systems SA	A	Dividend	J	T	Buy (add'l)	07/21/22	J		
105.					Sold (part)	09/20/22	J	A	
106.					Buy (add'l)	10/26/22	J		
107. Diageo	A	Dividend	K	T					
108. Digital Realty Trust Inc.	B	Dividend			Sold (part)	08/08/22	K	A	
109.					Sold	10/07/22	J	A	
110. Deutsche Post AG	A	Dividend			Sold	07/01/22	J	A	
111. Airbus Group NV ADR	A	Dividend	J	T	Buy	02/25/22	J		
112.					Sold (part)	09/20/22	J	A	
113.					Buy (add'l)	10/26/22	J		
114. Erste Group Bank AG	A	Dividend			Sold	07/01/22	J	A	
115. Emerson Electric	A	Dividend	K	T					
116. IShares MSCI Pacific ex Japan	A	Dividend	J	T					
117. Eaton Corp PLC	B	Dividend	L	T					
118. Entergy	B	Dividend	K	T	Sold (part)	08/08/22	K	E	
119. IShares MSCI Canada ETF	A	Dividend	J	T	Buy	03/24/22	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

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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.					Sold (part)	04/29/22	J	A	
121.					Buy (add'l)	12/12/22	J		
122. IShares MSCI Japan ETF	A	Dividend	J	T	Sold (part)	07/01/22	J	A	
123. IShares MSCI nited Kingdom Index	A	Dividend	K	T					
124. IShares Global Industrials ETF		None			Buy	09/20/22	J		
125.					Sold	10/25/22	J	A	
126. IShares MSCI EMU ETF	A	Dividend	K	T	Buy (add'l)	07/28/22	J		
127.					Sold (part)	08/30/22	J	A	
128. FedEx Corp	B	Dividend	L	T					
129. Ferguson Plc	A	Dividend	J	T	Sold (part)	02/25/22	J	B	
130. First Horizon Corp	A	Dividend			Sold (part)	03/30/22	K	D	
131.					Sold	04/22/22	J	C	
132. Five Star Bancorp	C	Dividend	M	T					
133. TechnipFMC PLC		None	J	T					
134. Fortinet Inc		None	J	T	Sold (part)	02/25/22	J	C	
135.					Sold (part)	08/08/22	K	D	
136. Fortive Corp	A	Dividend	J	T	Buy (add'l)	05/24/22	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	
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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.					Buy (add'l)	08/03/22	J		
138.					Sold (part)	08/08/22	K	A	
139. Alphabet Inc Class C		None	K	T	Sold (part)	04/04/22	J	D	
140. Alphabet Inc Class A		None	L	T	Buy (add'l)	06/08/22	K		
141.					Sold (part)	08/08/22	M	F	
142. GXO Logistics Inc		None	J	T	Sold (part)	06/14/22	J	A	
143. Huntington Bancshares Inc	B	Dividend	L	T					
144. Home Depot	C	Dividend	M	T	Sold (part)	08/08/22	K	C	
145. Harding Loevner Emerging Markets Advisor	A	Dividend	J	T	Buy (add'l)	02/22/22	J		
146.					Buy (add'l)	12/13/22	J		
147. Herbalife Ltd.		None			Sold	02/11/22	J	A	
148. Harding Loevner Inst Emerging Markets	A	Dividend	L	T	Sold (part)	12/07/22	K	A	
149. Hoya Corp SA	A	Dividend	J	T					
150. Honeywell International Inc	B	Dividend	L	T	Sold (part)	08/08/22	K	D	
151. Humana	A	Dividend	L	T					
152. IShares North American Tech-Software ETF	A	Dividend			Buy (add'l)	02/22/22	J		
153.					Sold	06/14/22	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

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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.)*

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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)	
154. IShares U.S. Aerospace & Defense ETF	A	Dividend	K	T	Buy	09/29/22	K		
155. IShares Core S&P 500 ETF	E	Dividend	P1	T	Buy (add'l)	08/08/22	P1		
156. IShares Russell 2000 ETF	B	Dividend	M	T					
157. Orix ADR	A	Dividend	J	T					
158. IShares Global Tech ETF		None			Buy	09/20/22	J		
159.					Sold	10/25/22	J	A	
160. IShares U.S. Healthcare ETF	A	Dividend			Buy	09/15/22	J		
161.					Sold	10/18/22	J	A	
162. IShares U.S. Telecommunications ETF		None	K	T	Buy	12/16/22	K		
163. Johnson Controls	A	Dividend			Sold	05/16/22	K	A	
164. Johnson & Johnson	B	Dividend	K	T	Sold (part)	08/08/22	K	B	
165. JPMorgan Chase and Company	C	Dividend	L	T	Sold (part)	08/08/22	K	B	
166. JPMorgan U.S. Small Company Fund Inst	D	Dividend	M	T	Buy (add'l)	12/13/22	J		
167. Kingfisher PLC SA	A	Dividend			Sold	09/09/22	J	A	
168. Kimberly Clark	B	Dividend	K	T					
169. Kinder Morgan Inc	B	Dividend	K	T					
170. KBW Regional Banking ETF	A	Dividend			Buy	05/27/22	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	
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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.)*

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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)	
171.					Sold	06/28/22	J	A	
172. Leggett & Platt	A	Dividend			Sold	05/03/22	K	A	
173. Leslies Inc		None			Buy	02/25/22	J		
174.					Buy (add'l)	02/28/22	J		
175.					Buy (add'l)	03/01/22	J		
176.					Buy (add'l)	03/16/22	J		
177.					Sold (part)	06/14/22	J	A	
178.					Buy (add'l)	07/20/22	J		
179.					Sold (part)	08/08/22	K	A	
180.					Sold	12/14/22	J	A	
181. Legrand SA Unsponsored ADR	A	Dividend			Sold	08/10/22	J	A	
182. LKQCorporation	A	Dividend	K	T	Buy (add'l)	04/04/22	K		
183.					Sold (part)	08/08/22	K	C	
184. Lockheed Martin	A	Dividend	K	T	Buy (add'l)	03/09/22	K		
185.					Buy (add'l)	03/17/22	J		
186.					Buy (add'l)	05/16/22	J		
187.					Sold (part)	08/08/22	K	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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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.)*

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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)	
188.					Buy (add'l)	09/23/22	J		
189. L'Oreal SA		None	J	T	Buy	09/09/22	J		
190.					Buy (add'l)	12/06/22	J		
191. Mastercard Cl A	A	Dividend	L	T	Sold (part)	03/10/22	K	A	
192. Matthews Pacific Tiger Fund Inv Class	A	Dividend	J	T	Buy (add'l)	12/14/22	J		
193. MASCO	A	Dividend	K	T	Sold (part)	03/01/22	J	A	
194.					Buy (add'l)	05/16/22	K		
195.					Sold (part)	08/08/22	K	A	
196.					Sold (part)	09/23/22	K	A	
197. McDonalds	B	Dividend	K	T	Buy (add'l)	01/13/22	K		
198.					Sold (part)	08/08/22	K	A	
199.					Buy (add'l)	11/02/22	J		
200. Medtronic PLC	A	Dividend			Sold	08/31/22	K	A	
201. Metlife	A	Dividend	K	T	Sold (part)	04/04/22	K	D	
202. Meta Platforms Inc.		None			Sold (part)	02/10/22	K	D	
203.					Sold	02/14/22	J	A	
204. Magna International Inc	A	Dividend	J	T	Sold (part)	03/24/22	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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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				
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205.					Buy (add'l)	04/29/22	J		
206. Matthews Pacific Tiger Fund Inst Class	C	Dividend	K	T	Buy (add'l)	07/01/22	K		
207.					Sold (part)	12/07/22	K	A	
208.					Buy (add'l)	12/14/22	J		
209. MccCormick & Co	A	Dividend	K	T					
210. Monster Beverage		None	K	T	Buy	02/10/22	K		
211.					Buy (add'l)	02/14/22	J		
212.					Sold (part)	08/08/22	K	B	
213.					Buy (add'l)	11/02/22	J		
214. Morrison Street Debt Opportunities Fund II	E	Dividend	K	T	Distributed (part)	06/01/22	J		
215. Macquarie Group Limited Sponsored ADR	A	Dividend			Sold	10/19/22	J	A	
216. Merck	A	Dividend	K	T					
217. Morgan Stanley	B	Dividend	K	T	Sold (part)	08/08/22	K	D	
218. Microsoft	C	Dividend	M	T	Sold (part)	08/08/22	M	G	
219. Motorola Solutions	A	Dividend			Sold	08/08/22	K	D	
220. IShares S&P Global Materials		None	J	T	Buy	09/16/22	J		
221.					Sold	10/20/22	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

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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.)*

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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)	
222. Nextera Energy Inc	A	Dividend	J	T					
223. Variant Alternative Income Fund	D	Dividend	M	T	Buy (add'l)	08/17/22	K		
224. Nike	A	Dividend	K	T	Sold (part)	05/24/22	K	C	
225. Nutrien Ltd	A	Dividend	J	T	Sold (part)	07/01/22	J	A	
226. Nucor Corp	B	Dividend	L	T					
227. Nvidia	A	Dividend			Buy	02/14/22	K		
228.					Buy (add'l)	03/10/22	K		
229.					Sold	08/08/22	K	A	
230. Novo-Nordisk A/S - Spons ADR	A	Dividend	K	T	Buy (add'l)	05/26/22	J		
231. OSHKOCH Corp	A	Dividend			Sold	05/16/22	K	A	
232. Otis Worldwide Corp Ordinary Shares	A	Dividend	J	T					
233. Pepsico	A	Dividend	J	T					
234. Pfizer	B	Dividend	K	T	Buy (add'l)	04/05/22	J		
235.					Sold (part)	04/19/22	K	C	
236.					Sold (part)	08/08/22	K	D	
237. Procter & Gamble	B	Dividend	L	T	Buy (add'l)	05/03/22	K		
238.					Sold (part)	08/08/22	K	D	

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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Name of Person Reporting	Date of Report
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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.)*

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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				
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239.					Buy (add'l)	09/23/22	J		
240. Parker Hannifin	A	Dividend	J	T	Buy (add'l)	05/16/22	J		
241.					Sold (part)	08/08/22	K	B	
242. Philip Morris International Inc	B	Dividend	K	T	Sold (part)	08/08/22	K	D	
243. Phillips 66	A	Dividend	J	T					
244. Reckitt Benckiser Group PLC ADR		None	J	T	Buy	10/19/22	J		
245.					Buy (add'l)	12/06/22	J		
246. Roche Holdings Ltd Spon ADR	A	Dividend	J	T					
247. Rockwell Automation	A	Dividend			Sold	05/24/22	J	A	
248. Raytheon Technologies Corp	A	Dividend			Buy	03/01/22	K		
249.					Buy (add'l)	08/03/22	K		
250.					Sold (part)	08/08/22	K	A	
251.					Buy (add'l)	09/06/22	K		
252.					Sold	09/29/22	K	A	
253. RW Aktiengesellschaf SA	A	Dividend	J	T					
254. RXO Inc		None	J	T					
255. IShares MSCI EAFE Small Cap Index ETF	A	Dividend	K	T	Buy (add'l)	12/12/22	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	
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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.)*

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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				
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256. Shin-Etsu Chemical Co Ltd Unsp ADR	A	Dividend	J	T	Buy (add'l)	07/21/22	J		
257. Sonic Healthcare Ltd ADR	A	Dividend	J	T					
258. Schlumberger	A	Dividend	K	T	Buy (add'l)	04/04/22	J		
259.					Sold (part)	08/08/22	K	D	
260. Synovus Financial	A	Dividend			Buy	03/30/22	J		
261.					Buy (add'l)	03/31/22	J		
262.					Sold	08/08/22	J	A	
263. Sony Corp ADR	A	Dividend	K	T					
264. SSE PLC ADR	A	Dividend	J	T					
265. Schwab International Index Fund	D	Dividend	N	T					
266. Schwab Tax-Free Bond Fund	A	Dividend			Buy	06/30/22	K		
267.					Sold	07/11/22	K	A	
268. Schwab S&P500 Index Fund	D	Dividend	O	T					
269. Schwab Small Cap Index Select	A	Dividend	K	T					
270. Stryker	A	Dividend	K	T	Sold (part)	08/08/22	J	B	
271. AT&T	A	Dividend	K	T	Buy	01/25/22	J		
272.					Buy (add'l)	05/06/22	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

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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.)*

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273.					Buy (add'l)	10/07/22	J		
274. Toronto Dominion Bank	A	Dividend	J	T					
275. Truist Financial Corporation	B	Dividend	K	T	Sold (part)	08/08/22	K	C	
276. Thales ADR	A	Dividend	J	T	Buy	09/22/22	J		
277.					Buy (add'l)	11/15/22	J		
278. TJX Companies	A	Dividend	J	T	Sold (part)	08/08/22	K	A	
279. Telekomunikasi Indonesia (Persero)	A	Dividend	J	T	Buy	01/26/22	J		
280.					Sold (part)	11/10/22	J	A	
281.					Sold (part)	11/11/22	J	A	
282.					Sold (part)	11/14/22	J	A	
283.					Sold (part)	11/15/22	J	A	
284. Teleperformance SE DR		None	J	T	Buy	08/10/22	J		
285.					Buy (add'l)	09/22/22	J		
286. Thermo Fisher Scientific	A	Dividend	K	T	Buy (add'l)	07/19/22	K		
287.					Sold (part)	08/08/22	K	D	
288. Travelers Companies	A	Dividend	K	T					
289. Tyson Foods, Inc Cl A	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
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290. Total S.A. - Spon ADR	A	Dividend	J	T	Buy	04/29/22	J		
291.					Sold (part)	12/15/22	J	A	
292. Texas Instruments	A	Dividend	K	T					
293. UnitedHealth Group	B	Dividend	M	T	Sold (part)	08/08/22	L	E	
294. Union Pacific	A	Dividend	J	T	Sold (part)	03/09/22	K	D	
295.					Sold (part)	08/08/22	K	B	
296. Universal Music Group NV ADR		None			Sold	01/26/22	J	A	
297. Visa Inc	A	Dividend	L	T	Sold (part)	08/08/22	K	D	
298. Versus Capital Multi Manager RE Fund Inst	C	Dividend	L	T	Buy (add'l)	08/17/22	J		
299.					Sold (part)	10/28/22	K	C	
300. Versus Capital Real Asset Fund, LOLC	B	Dividend	M	T	Buy (add'l)	08/17/22	L		
301. VAnguard FTSE Developed Market ETF	A	Dividend	J	T					
302. Voya Financial Inc	A	Dividend			Sold	08/08/22	K	B	
303. Vanguard FTSE All World ex-US SC ETF	A	Dividend	J	T					
304. VVanguard Inter Tax Exempt ?Fund ADM	A	Dividend	K	T					
305. Vanguard FTSE Emerging Market ETF	B	Dividend	L	T	Buy (add'l)	12/07/22	L		
306. Verizon Communications	B	Dividend			Buy (add'l)	01/25/22	J		

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307.					Sold	12/16/22	K	A	
308. Western Alliance Bancorp	A	Dividend	J	T	Buy	02/11/22	K		
309.					Buy (add'l)	02/14/22	J		
310.					Sold (part)	05/27/22	J	A	
311.					Buy (add'l)	06/28/22	J		
312.					Sold (part)	08/08/22	K	A	
313. Warner Bros. Discovery Inc		None			Sold (part)	04/11/22	J	A	
314.					Sold	04/29/22	J	A	
315. Waste Connections	A	Dividend	K	T					
316. Woodside Energy Group Ltd		None			Buy	06/02/22	J		
317.					Sold (part)	06/02/22	J	A	
318.					Sold	06/08/22	J	A	
319. Warner Music Group Corp.	A	Dividend			Sold (part)	03/18/22	J	A	
320.					Buy (add'l)	04/29/22	J		
321.					Sold (part)	08/08/22	J	A	
322.					Sold	08/29/22	J	A	
323. Wal-Mart DE Mexico S.A.B. de C.V. ADR		None	J	T	Buy	12/06/22	J		

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324. Wal Mart Stores	A	Dividend			Sold	08/08/22	K	A	
325. Materials Select Sector SPDR	A	Dividend	K	T					
326. Communication Services SPDR	A	Dividend			Sold (part)	01/25/22	K	A	
327.					Buy (add'l)	03/18/22	J		
328.					Sold	04/29/22	J	A	
329. Energy Select Sector SPDR	A	Dividend	K	T					
330. Consumer Staples SPDR		None			Sold	02/14/22	J	A	
331. Consumer Discretionary Select	A	Dividend	K	T	Sold (part)	02/14/22	K	A	
332.					Buy (add'l)	06/14/22	K		
333.					Sold (part)	07/20/22	K	C	
334.					Buy (add'l)	12/13/22	K		
335. XPO Logistics		None	J	T					
336. SPDR S&P 500 Retail ETF	A	Dividend	J	T	Buy	12/14/22	J		
337. Zoetis	A	Dividend			Sold	08/08/22	K	D	
338. Life Insurance Cash Value, Guardian X		None	N	T					
339. Life Insurance Cash Value, Lincoln Financial X		None	J	T					
340. Cali Alii LLC, Maui, HI)		None	M	W					

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341. SP UPW, LLC (16.43%) Pasco, WA, XPO Freight, Dec. 2011	E	Distribution	M	U					
342. RPG, LLC (4.23%) Grass Valley, CA, CA Hwy Patrol, Sept. 2011	D	Distribution	L	U					
343. DKBB, LLC Oak Cap2/PacWest (50%), Real Estate Inv. Fund, March 2013	E	Distribution	N	U					
344. Green Hat, LLC (25%), Real Estate Inv. Fund, April 2013	D	Distribution	M	U					
345. Oakland, CA Condo, (50%)		None	M	W					
346. DKBB Properties, LLC Lex. KY (18%)Waller Office Bld		None	O	W					
347. DKBB Properties II, (18%) LLC Capstone, Lex Warehouse		None	N	U					
348. OCP III, LLC (2.59%) Real Estate Inv. Fund, Dec. 2015	D	Distribution	N	U					
349. Chimney Cove, LLC (3.3%) HH South Carolina, Multi Family, Dec. 2015	D	Distribution	L	U					
350. BoomCor I, LLC/SCH BoomCor, LLC, Multi Family, Feb. 2019	C	Distribution	M	U					
351. Oak Capital IV, LLC Sacramento, CA, Real Estate Inv. Fund, Jan. 2021	E	Distribution	O	U					
352. Mercury Real Estate Rollover Aggregator, LLC (2.68%) RE Fund 6/21	F	Distribution	P1	U					
353. NJC Property, LLC Naples, FL, Condo		None	N	U					
354. Setzer Prop Fund I, LLC (1.063%), RE Fund, Nov. 2021	F	Distribution	P1	U					
355. SP RRTAI TIC, LLC (15%), Oct. 2022	C	Distribution	M	U	Buy	10/01/22	M		
356. 2333 Innovation, LLC (6.42%), Industrial Bldg, Lex KY, Nov. 2022	C	Distribution	M	U	Buy	11/01/22	M		
357. Central Valley Bancorp 3,563 shares @ $13.50		None	K	T					

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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)	
358. Apostles General Partnership 396 shares, Oil/Gas, Texas		None	M	U					
359. Apostles GP 2, Oil/Gas, Texas		None	L	U					
360. Yolo Partners, LLC (14.25%) 10/31/ exchange, Livingston, MT		None	O	U	Buy	11/01/22	O		
361. Sycamore Farms, LLC (70%), 20 acres Walnuts, 2012		None	N	U					
362. Camden Partners 555, LLC, CA Restaurant	C	None	J	U					
363. Yolo Partners, LLC (14.25%) sold and rolled into 10/31 in Yolo Partner		None			Sold	10/01/22	O	G	
364. Chalk Group Horseco		None			Sold	12/01/22	K		
365. SP CLD, LLC (12.6%)		None			Sold	10/01/22	M	G	
366. SP GRB, LLC (2.86%)		None			Sold	09/01/22	M	F	
367. SP RRTAI, LLC (14.25%)		None			Sold	08/01/22	O		
368. Placer Athens, LLP 1,2 (3%)		None			Sold	02/01/22	N	F	
369. SP RDU, LLC Raleigh/Durham		None			Sold	01/01/22	M	G	
370. Jasper H Properties, LLC, Inez, KY		None	M	W					
371. American Funds Growth Fund of America 529A		None	N	T					
372.									
373.									
374.									

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
Boom, Claria H.	09/25/2023

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)	
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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	
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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.)*

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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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Name of Person Reporting	Date of Report
Boom, Claria H.	09/25/2023

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

Name of Person Reporting	Date of Report
Boom, Claria H.	09/25/2023

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

Signature: s/ Claria H. Boom

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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