AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 13101-13111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Brown, Jeffrey V.	U.S. District Court, Southern District of Texas	05/15/2024
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
U.S. District Judge (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
U.S. Courthouse 601 25th Street Galveston, Texas 77550		

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.	Director	University of Houston Law Foundation
2.	Director	Houston Law Review
3.	Independent Contractor (book editor)	Thomson Reuters
4.	President Elect	Galveston County Bar Association
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.	2001	State of Texas: Judicial Pension (defined benefit pension plan)
2.	2001	Harris County, Texas: Employee Pension (reportable assets are listed in Part VII)
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.	2023	Thomson-Reuters, book-editing income	$2,000.00
2.	2023	Texas Judicial Retirement System, judicial pension	$107,867.04
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE
1.	2023	The Bryan Museum (salary)
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.	American Law Institute (ALI)	October 25-26, 2023	Philadelphia, PA	Advisers Group Meeting	Transportation, Meals, Lodging
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.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Brown, Jeffrey V.	05/15/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

	A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1.	Individual Assets (H)									
2.	Chase Bank (cash)		None	K	T					
3.	Morgan Stanley (cash)	A	Interest	J	T					
4.	Account #1 (H)									
5.	iShares 20+ Yr Treasu Bond ETF (TLT)	A	Dividend	J	T					
6.	American Bd Fd of America F2 (ABNFX)	A	Dividend	J	T	Buy (add'l)	06/09/23	J		
7.	Blackrock Total Ret l (MAHQX)	A	Dividend	J	T	Buy (add'l)	06/09/23	J		
8.	BNY Mellon Intl Stock I (DISRX)	A	Dividend	J	T					
9.	Edgewood Growth Instl Fund (EGFIX)		None	J	T	Buy (add'l)	09/22/23	J		
10.	GQG Partners Emrg Mkts Eq Ins (GQGIX)	A	Dividend	J	T	Sold (part)	09/22/23	J	A	
11.	Hartford Dividend & Growth I (HDGIX)	A	Dividend	J	T	Sold (part)	09/22/23	J	A	
12.	Hartford Schroder Emerging Markets Eq I (SEMNIX)	A	Dividend	J	T					
13.	JPMorgan U.S. Equity I (JUESX)	A	Dividend	J	T	Buy	09/22/23	J		
14.	JPMorgan Value Advantage I Fund (JVASX)	A	Dividend	J	T	Sold (part)	09/22/23	J	A	
15.	Lazard Intl Strat Eq Ptf Inst Fund (LISIX)	A	Dividend	J	T					
16.	Loomis Growth Y Fund (LSGRX)	A	Dividend	J	T	Sold (part)	06/09/23	J	A	
17.						Buy (add'l)	09/22/23	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

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

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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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)	
18. Metropolitan West Tot Ret Bd I Fund (MWTIX)	B	Dividend	J	T	Buy (add'l)	06/09/23	J		
19. MFS Mid Cap Growth I (OTCIX) (Y)									
20. Neuberger Intrinsic Value Inst Fund (NINLX) (Y)									
21. Nuance Mid Cap Value Institutional (NMVLX)	A	Dividend	J	T					
22. Pear Tree Polaris FGN VL I Fund (QFVIX)	A	Dividend	J	T					
23. Pimco Low Duration Inc I2 (PFTPX)	A	Dividend	J	T	Sold (part)	06/06/23	J		
24. Western Asset Core Plus Bond I (WACPX)	A	Dividend	J	T	Buy (add'l)	06/09/23	J		
25. Account #2 (H)									
26. BlackRock LifePath Index 2035 Fund		None	K	T					
27. Account #3 (H)									
28. Calvert VP SRI Balanced Portfolio		None	J	T					
29. Account #4 (H)									
30. Invesco CollegeBound Today Portfolio A		None	J	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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3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value.

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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/ Jeffrey V. Brown

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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