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
Bucklew, Susan C.	U.S. Dist. Ct. Mid. Dist.Fl.	05/20/2024
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-Senior	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/1/2023 **to** 12/31/2023
7. Chambers or Office Address		
Sam M. Gibbons U.S. Courthouse 801 N. Florida Ave Tampa, Fl. 33602		

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	Revocable Trust (See Part VII line 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.	1996	State of Florida---Judicial Retirement
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.	2023	State of Florida---Division of Retirement	$60,174.00
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.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Bucklew, Susan C.	05/20/2024

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure		B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
1.	Revocable Trust #1 (H)									
2.	---Pimco Dynamic Income Fund (PDI)	C	Dividend			Sold	12/20/23	K		
3.	---Invesco Preferred ETF (PGX)	A	Dividend			Sold	12/21/23	J		
4.	---Lord Abbett Growth Leaders C (LGLCX)	A	Dividend			Sold	12/20/23	K		
5.	---Virtus Allianzgi FCSD (PGWCX)	A	Dividend			Sold	12/20/23	K		
6.	---GS Dual Directional Trigger Participation Note SPX (SQGGO)	A	Distribution			Redeemed	08/03/23	K		
7.	---GS Trigger Jump SX5E (SQGGP)	A	Dividend	K	T					
8.	---Nebraska Pub Pwr Dist Genl Rev-D (Bond)	A	Interest	K	T					
9.	----Tampa Fla Non-Ad Valorem Re Oid (Bond)	A	Interest	K	T					
10.	---O'Shares FTSE US Quality Div (OUSA)	A	Dividend	M	T	Buy (add'l)	12/21/23	L		
11.	---Federated HRMS Prime CS OBL WS (PCOXX)	D	Dividend			Sold	12/19/23	K		
12.	---Morgan Stanley Private Bank NA#	A	Interest	L	T					
13.	---Plains Tex ID 08-01-23 (Bond)	A	Interest	K	T	Buy	12/19/23	K		
14.	---Utah Infrastructure AGY Telecommunication (Bond)	A	Interest	K	T	Buy	12/19/23	K		
15.	---Miami-Dade Cnty FLA Health FACS Auth Hos (Bond)	A	Interest	K	T	Buy	12/19/23	K		
16.	---Baldwin Cnty ALA Health FACS Auth Hos (Bond)	A	Interest	K	T	Buy	12/19/23	K		
17.	---Salida COLO CTFS Part OID (Bond)	A	Interest	K	T	Buy	12/19/23	K		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
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. ---Pataskala Ohio Pub Libr CTFS Part OID (Bond)	A	Interest	K	T	Buy	12/19/23	K		
19. ---BOA 11.2% Contingent Autocall NVDA	A	Interest	J	T	Buy	12/22/23	J		
20. ---UBS 10.35 Contingent Autocall AMZN	A	Interest	J	T	Buy	12/22/23	J		
21. IRA (H)									
22. ---Morgan Stanley Private Bank--cash account	A	Interest	J	T	Buy (add'l)	03/07/23	J		
23. ---Clearbridge Large Cap Growth (SMAL)		None			Closed	01/03/23	L		
24. ---JP Morgan Large Cap Growth	A	Dividend	L	T	Open	01/03/23	L		
25. ---Eaton Vance Floating Rate I (EIBLX)	D	Dividend	L	T	Buy (add'l)	12/04/23	J		
26.					Sold (part)	12/06/23	J		
27. ---Invesco Premier Inst (IPPXX)	A	Dividend	J	T	Buy (add'l)	12/04/23	J		
28.					Sold (part)	12/06/23	J		
29. ---John Hancock Intl Growth Fd (GOGIX)	B	Dividend	L	T	Sold (part)	12/06/23	J		
30.					Buy (add'l)	12/27/23	J		
31. ---JP Morgan Equity Income Select (HLIEX)	B	Dividend	L	T	Buy (add'l)	03/08/23	J		
32.					Buy (add'l)	06/29/23	J		
33.					Buy (add'l)	10/13/23	J		
34.					Sold (part)	12/06/23	J		

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35. ---Lazard US EQ Concentrd Inst (LEVIX)	B	Dividend	L	T	Buy (add'l)	10/13/23	J		
36.					Sold (part)	12/06/23	J		
37.					Buy (add'l)	12/27/23	J		
38. ---FT-Preferred Secur & Inc ETF (FPE)	C	Dividend	L	T	Buy (add'l)	05/24/23	J		
39.					Buy (add'l)	06/29/23	J		
40.					Sold (part)	12/05/23	J		
41. Vanguard 500 INDX Admiral (VFIAX)	A	Dividend			Sold	12/20/23	K	E	
42. Vanguard S&P 500 ETF (VOO)	A	Dividend	K	T	Buy	12/21/23	K		
43. Susan C. Bucklew C/F [redacted] /FL (X)									
44. ---Vanguard S&P 500 ETF (VOO)	A	Dividend	J	T					
45. Bank of America Checking Account	A	Interest	J	T					
46. Suncoast Credit Union Savings Account	A	Interest	J	T					

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

Lines 8 & 9 and 13-18 are Municipal Bonds

Lines 23, 24, 25, 27, 29, 31, 35, and 38 are assets in a Morgan Stanley Unified Managed Account. Clearbridge (line 23) JP Morgan Large Cap Growth (line 24) contain stock, EV Floating Rate (line 25), Invesco Premier Inst (line 27) , John Hancock Intl Growth (line 29), JP Morgan Equity Income (line 31) and Lazard US EQ Concentrd Inst (line 35) are mutual funds; and FT Preferred Secur & Inc (line 38) is an ETF. They are broker managed accounts, and I do not control the selection of the assets beyond selecting a risk category. Therefore I did not list the underlying assets.

Lines 23 & 24 Clearbridge Large Cap and JP Morgan Large Cap Growth are the same unified managed account containing stocks but in January 2023 the fund changed managers from Clearbridge to JP Morgan. Nothing was sold or bought.

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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/ Susan C. Bucklew

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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