Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Casper, Denise Jefferson
U.S. District Court - Massachusetts
District Judge

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

/s/ Casper, Denise Jefferson [electronically signed on May 27, 2026 7:01am by Casper, Denise Jefferson in JEFS]
/s/ Casper, Denise Jefferson [electronically signed on May 6, 2026 4:46pm by Casper, Denise Jefferson in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Donor Advised Fund #1	Other	Fund Advisor
2.	American Repertory Theater	Other	Trustee

II. Agreements

I do not have any Agreements to report
No entries in this section

III A. Filer Non-Investment Income

I do not have any Filer Non-Investment Income to report
No entries in this section

III B. Spouse Non-Investment Income

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	Self-Employed: Consultant/writer		No	$0.00	

IV. Reimbursements

I do not have any Reimbursements to report
No entries in this section

V. Gifts

I do not have any Gifts to report
No entries in this section

VI. Liabilities

I do not have any Liabilities to report
No entries in this section

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**(H) IRA #1**				
1-A.	Cliffwater Corporate Lending Fund I (CCLFX)	$100,001 - $1,000,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
1-B.	Schwab Government Money Fund (SWGXX)		None	$15,000 or less	Cash/Market
2.	**U.S. Savings Bonds**	$1,000 or less	Interest	$15,001 - $50,000	Estimated
3.	**(H) Trust**				
3-A.	iShares MSCI ETF (ACWI)	$5,001 - $15,000	Dividend	$500,001 - $1,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 25, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 19, 2025	$15,001 - $50,000

3-B.	Schwab Government Money Fund (SWGXX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

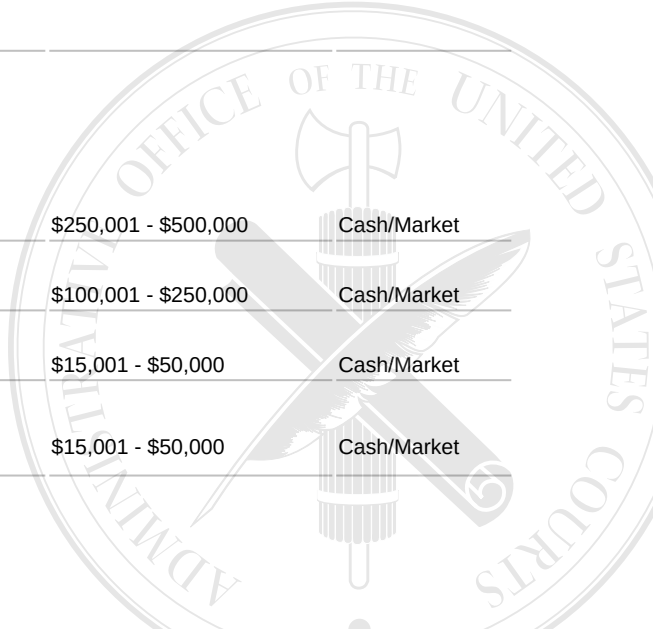
Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 28, 2025	$15,001 - $50,000
(2).	Buy (add'l)	May 19, 2025	$15,001 - $50,000
(3).	Sold (part)	May 20, 2025	$15,001 - $50,000
(4).	Buy (add'l)	Jun 23, 2025	$15,000 or less
(5).	Buy (add'l)	Dec 22, 2025	$15,000 or less

4.	**Water Street Healthcare Partners II, Limited Partnership**	$2,501 - $5,000	Distribution	$15,000 or less	Estimated
5.	**Water Street Healthcare Partners, Limited Partnership**		None		

Additional Explanation: Closed

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Closed	Jan 1, 2025	$15,000 or less

6.	**Ally Bank Accounts**	$5,001 - $15,000	Interest	$250,001 - $500,000	Cash/Market
7.	**Bank of America Accounts**	$1,001 - $2,500	Interest	$100,001 - $250,000	Cash/Market
8.	**Fidelity bank account**	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
9.	**American Funds Growth Fund of America Class A (AGTHX)**	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
10.	**Brown Capital International Small Co. Inv. Shs (BCSVX)**		None	$15,001 - $50,000	Cash/Market
11.	**(H) Charles Schwab**				
11-A.	Vanguard Total World (VT)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Nov 14, 2025	$15,000 or less

11-B.	FPA Crescent Supra Inst (FPCSX)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Nov 14, 2025	$15,000 or less

11-C.	U.S. Treasury 4.0% due 06/30/32 (91282CNJ6)	$1,001 - $2,500	Interest	$50,001 - $100,000	Cash/Market
11-D.	Schwab U.S. Treasury Money Investor (SNSXX)	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 9, 2025	$15,000 or less
(2).	Sold (part)	Nov 14, 2025	$15,000 or less
(3).	Sold (part)	Nov 28, 2025	$15,000 or less

11-E.	Charles Schwab Bank		None	$15,000 or less	Cash/Market
11-F.	Charles Schwab Cash		None	$15,000 or less	Cash/Market
11-G.	Cambrian BioPharma, Closely Held Stock		None	$15,001 - $50,000	Book Value
12.	**(H) IRA #3**				
12-A.	Vanguard Total World (VT)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Nov 14, 2025	$15,000 or less

12-B.	Charles Schwab Bank	$1,000 or less	Interest	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Distributed (part)	Dec 2, 2025	$15,000 or less

Additional Explanation: Required minimum distribution

13.	**U.S. Treasury Note 4.625% due 05/31/31 (91282CKU4)**	$15,001 - $50,000	Interest	$1,000,001 - $5,000,000	Cash/Market
14.	**Cohen & Steers Instl Realty Shares (CSRIX)**	$50,001 - $100,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
15.	**Schwab U.S. Treasury Money Investor (SNSXX)**	$15,001 - $50,000	Dividend	$1,000,001 - $5,000,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 10, 2025	$100,001 - $250,000
(2).	Sold (part)	Jan 16, 2025	$15,001 - $50,000
(3).	Sold (part)	Jan 27, 2025	$15,001 - $50,000
(4).	Buy (add'l)	Jan 30, 2025	$250,001 - $500,000
(5).	Sold (part)	Feb 11, 2025	$50,001 - $100,000
(6).	Sold (part)	Feb 25, 2025	$15,001 - $50,000
(7).	Sold (part)	Feb 28, 2025	$15,001 - $50,000
(8).	Sold (part)	Mar 6, 2025	$50,001 - $100,000
(9).	Sold (part)	Mar 12, 2025	$50,001 - $100,000
(10).	Sold (part)	Apr 22, 2025	$50,001 - $100,000
(11).	Buy (add'l)	Apr 29, 2025	$250,001 - $500,000
(12).	Sold (part)	May 16, 2025	$50,001 - $100,000
(13).	Buy (add'l)	Jun 2, 2025	$250,001 - $500,000
(14).	Buy (add'l)	Jun 4, 2025	$15,001 - $50,000
(15).	Sold (part)	Jun 5, 2025	$100,001 - $250,000
(16).	Buy (add'l)	Jul 1, 2025	$15,000 or less
(17).	Sold (part)	Jul 15, 2025	$50,001 - $100,000
(18).	Sold (part)	Jul 22, 2025	$250,001 - $500,000
(19).	Buy (add'l)	Jul 23, 2025	$500,001 - $1,000,000
(20).	Sold (part)	Jul 24, 2025	$15,000 or less
(21).	Sold (part)	Aug 19, 2025	$50,001 - $100,000
(22).	Sold (part)	Aug 28, 2025	$15,001 - $50,000
(23).	Sold (part)	Sep 8, 2025	$50,001 - $100,000
(24).	Sold (part)	Oct 24, 2025	$15,001 - $50,000
(25).	Sold (part)	Nov 6, 2025	$50,001 - $100,000
(26).	Sold (part)	Nov 12, 2025	$15,001 - $50,000
(27).	Sold (part)	Nov 24, 2025	$50,001 - $100,000
(28).	Sold (part)	Dec 2, 2025	$15,000 or less
(29).	Buy (add'l)	Dec 31, 2025	$250,001 - $500,000

16.	**U.S. Treasury Note 4.375% due 11/30/30 (91282CJM4)**	$100,001 - $1,000,000	Interest	$1,000,001 - $5,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 8, 2025	$15,000 or less

17.	**Zevenbergen Growth Institutional (ZVNIX)**	$15,001 - $50,000	Dividend	$1,000,001 - $5,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jan 30, 2025	$250,001 - $500,000
(2).	Sold (part)	Jun 2, 2025	$100,001 - $250,000
(3).	Sold (part)	Jul 23, 2025	$100,001 - $250,000

18.	**Cliffwater Corporate Lending Fund I (CCLFX)**	$50,001 - $100,000	Dividend	$500,001 - $1,000,000	Cash/Market
19.	**Nuveen Real Estate SEC SEL R6 (TIREX)**	$50,001 - $100,000	Dividend	$1,000,001 - $5,000,000	Cash/Market

Additional Explanation: See Part VIII Additional Information

20.	**iShares Russell 2000 (IWM)**	$5,001 - $15,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
21.	**iShares Russell 1000 Value ETF (IWD)**	$50,001 - $100,000	Dividend	$1,000,001 - $5,000,000	Cash/Market

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	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jun 2, 2025	$15,001 - $50,000
(2).	Sold (part)	Jul 23, 2025	$100,001 - $250,000

22.	**FPA Crescent Supra Inst (FPCSX)**	$100,001 - $1,000,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
23.	**Aquarius International (ASBSZ)**	$100,001 - $1,000,000	Dividend	$5,000,001 - $25,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Apr 29, 2025	$250,001 - $500,000
(2).	Sold (part)	Jun 2, 2025	$250,001 - $500,000
(3).	Sold (part)	Jul 23, 2025	$50,001 - $100,000

24.	**Adara Smaller Companies (ASCSZ)**	$100,001 - $1,000,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
25.	**AMG GW&K Municipal Bond Fund Inst (GWMIX)**	$100,001 - $1,000,000	Dividend	$5,000,001 - $25,000,000	Cash/Market
26.	**iShares MSCI ACWI ETF (ACWI)**	$50,001 - $100,000	Dividend	$1,000,001 - $5,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jul 23, 2025	$50,001 - $100,000

27.	**Schwab S&P Index Fund (SWPPX)**	$15,001 - $50,000	Dividend	$1,000,001 - $5,000,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Apr 8, 2025	$15,000 or less

28.	**Schwab Premier Bank Cash Account**		None	$100,001 - $250,000	Cash/Market
29.	**Charles Schwab Account**	$1,000 or less	Interest	$250,001 - $500,000	Cash/Market
30.	**(H) IRA #2**				
30-A.	Cliffwater Corporate Lending Fund (CCLFX)	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market

VIII. Additional Information or Explanations

	ADDITIONAL INFORMATION OR EXPLANATION
1.	Line 19, corrected ticker to TIREX from TIRIX and removed f/k/a TIAA-CREF Real Estate Sec in description (reported on line 35 in 2024)