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
Chuang, Theodore D.	United States District Court, District of Maryland	07/29/2022
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**
United States District Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
United States Courthouse 6500 Cherrywood Lane Greenbelt, MD 20770		

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.	Advisor	Asian Pacific American Bar Association of Maryland
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.		
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.	2021	National Immigration Forum - 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.					
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.	Cenlar	Mortgage on rental property, Brookline, MA	M
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Chuang, Theodore D.	07/29/2022

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. Rental Property, Brookline, MA	E	Rent	O	W					
2. Citibank Cash Accounts	A	Interest	O	T					
3. Emigrant Direct Cash Account	A	Interest	K	T					
4. Fidelity Dividend Growth Fund	D	Dividend	L	T					
5. Lord Abbett Affiliated A Fund	E	Dividend	N	T					
6. Brokerage Account #1 (H)									
7. - BNY Mellon International Stock Index Fund	B	Dividend	K	T					
8. - BNY Mellon Mid Cap Index Fund	B	Dividend	L	T					
9. - Janus Henderson Global Research Fund	D	Dividend	L	T					
10. - Janus Henderson Growth & Income Fund	D	Dividend	L	T					
11. - Loomis Sayles Bond Fund	C	Dividend	K	T					
12. - Oakmark Fund	B	Dividend	M	T					
13. - Schwab S&P 500 Fund	B	Dividend	M	T					
14. - Schwab Small Cap Index Fund	D	Dividend	L	T					
15. Brokerage Account #2 (H)									
16. - Schwab Bank	A	Int./Div.	M	T					
17. - Schwab 1000 Fund	C	Dividend	M	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	
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18. - Schwab Core Equity Fund	D	Dividend	K	T					
19. Brokerage Account #3 (H)									
20. - Morgan Stanley Bank	A	Interest	J	T					
21. - Cisco Systems stock	A	Dividend	J	T					
22. - Invesco Diversified Dividend A	D	Dividend	L	T					
23. - Microsoft Corporation stock	A	Dividend	L	T					
24. - Invesco QQQ Trust (QQQ)	A	Dividend	K	T					
25. IRA #1 (H)									
26. - Janus Henderson Growth & Income Fund	B	Dividend	K	T					
27. - Oakmark Fund	A	Dividend	K	T					
28. - Schwab 1000 Fund	A	Dividend	K	T					
29. IRA #2 (H)									
30. - Schwab Bank	A	Int./Div.	J	T					
31. - Columbia Global Equity	A	Dividend	J	T					
32. - Oakmark Fund	A	Dividend	K	T					
33. - Schwab 1000 Fund	B	Dividend	L	T					
34. - Schwab Small Cap Index Fund	B	Dividend	K	T	Buy (add'l)	03/04/21	J		

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35. - Invesco QQQ Trust (QQQ)	A	Dividend	K	T					
36. IRA #3 (H)									
37. -Fidelity Freedom 2030	D	Dividend	M	T					
38. Fidelity Cash Reserves	A	Int./Div.	J	T					
39. IRA #3.5 (H)									
40. Fidelity Freedom 2030	D	Dividend	L	T					
41. IRA#4 (H)									
42. -Fidelity Freedom 2030	B	Dividend	K	T					
43. -Fidelity Freedom 2035	D	Dividend	L	T					
44. IRA#5 (H)									
45. - Vanguard Life Strategy Growth Fund	C	Dividend	M	T					
46. My 529 Age Based Aggressive Global	A	Dividend	M	T	Sold (part)	01/19/21	K	D	
47.					Sold (part)	08/12/21	K	E	
48. Maryland College Investment Plan Portfolio 2024		None	N	T					
49. Northwestern Mutual Whole Life Insurance Policy	A	Dividend	K	T					
50. U.S. Govt. Securities Series EE Bonds		None	L	T					
51. 401(k) #1 (H)									

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52. John Hancock Multimanager 2035 Lifetime		None	N	T	Buy (add'l)	01/29/21	J		
53.					Buy (add'l)	02/26/21	J		
54.					Buy (add'l)	03/31/21	J		
55. IRA#6 (H)									
56. Schwab Bank	A	Interest	N	T					
57. Agilent Technologies	A	Dividend			Sold	12/22/21	J	D	
58. Ford Motor Co.	A	Dividend	J	T					
59. General Electric Co.	A	Dividend	J	T					
60. Keysight Tech, Inc.	A	Dividend			Sold	12/23/21	J	D	
61. Microsoft Corp.	A	Dividend	K	T					
62. Oracle Corp.	A	Dividend			Sold	03/04/21	J	C	
63. Walt Disney Co.	A	Dividend			Sold	04/07/21	K	D	
64. Aberdeen Int'l Equity Fund	B	Dividend	J	T					
65. Federated Kaufmann Fund	D	Dividend	L	T					
66. Schwab S&P 500 Index Fund	B	Dividend	M	T	Buy (add'l)	01/11/21	K		
67.					Buy (add'l)	03/01/21	J		
68.					Buy (add'l)	03/04/21	J		

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69.	Schwab Small Cap Index Fund	B	Dividend	K	T	Buy (add'l)	03/08/21	K		
70.	Healthcare Select Sector SPDR Fund (XLV)	A	Dividend	J	T					
71.	Cons Discret Select Sector SPDR Fund (XLY)	A	Dividend	J	T					
72.	The Financial Select Sector SPDR Fund (XLF)	A	Dividend	J	T					
73.	The Technology Select Sector SPDR Fund (XLK)	A	Dividend			Sold	03/01/21	J	C	
74.	Invesco QQQ TR (QQQ)	A	Dividend	K	T					
75.	SPDR S&P 500 ETF Trust (SPY)	A	Dividend			Sold	03/01/21	J	C	
76.	Wells Fargo & Co New (WFC)	A	Dividend			Sold	12/21/21	J	A	
77.	SPDR S&P Dividend Fund (SDY)	A	Dividend	J	T					
78.	IShares US Aerospace & Def ETF (ITA)	A	Dividend	J	T					
79.	First Trust DJ Internet (FDN)	A	Dividend			Sold	03/04/21	J	C	
80.	First Trust Value (FVD)	A	Dividend	J	T					
81.	Amgen, Inc. common stock (AMGN)	A	Dividend			Sold	03/19/21	L	D	
82.	Apple, Inc. common stock (AAPL)	A	Dividend			Sold	04/05/21	K	D	
83.	Applied Materials, Inc. common stock (AMAT)	A	Dividend			Sold	03/01/21	K	E	
84.	Johnson & Johnson common stock (JNJ)	A	Dividend			Sold	12/21/21	J	A	
85.	Cons Staples Sel Sect SPDR Fund (XLP)	A	Dividend			Sold	03/01/21	J	A	

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86. Comm Serv Select Sector SPDR (XLC)	A	Dividend			Sold	03/01/21	J	B	
87. Utilities Sel Sect SPDR Fund (XLU)	A	Dividend	J	T					
88. Lord Abbett Ultra Short Bond Fund (LUBFX)	A	Dividend			Sold	01/11/21	J	A	
89. Starbucks common stock (SBUX)	A	Dividend			Sold	03/01/21	J	B	
90. Alphabet, Inc. Class A common stock (GOOGL)	A	Dividend			Sold	04/26/21	J	D	
91. Industrial Sel Sec SPDR Fund (XLI)	A	Dividend	J	T					
92. IShares PHLX Semiconductor (SOXX)	A	Dividend	J	T					
93. First Trust NYSE ARCA (FBT)	A	Dividend	J	T					
94. MasterCard, Inc. Class A common stock (MA)	A	Dividend			Sold	03/01/21	J	A	
95. SPDR Gold Tr Gold SHS (GLD)	A	Dividend	J	T					
96. JPMorgan Chase common stock (JPM)	A	Dividend			Sold	03/01/21	J	B	
97. First Trust Rising Div Achiev (RDVY)	A	Dividend	J	T					
98. Verizon Communications common stock	A	Dividend	J	T					
99. Guggenheim Limited Duration (GILHX)	A	Dividend			Sold	01/11/21	J	A	
100. IRA#6A (H)									
101. CGM Mutual Fund (LOMMX)		None			Sold	01/11/21	J		
102. Brokerage Account #4C (H)									

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103. Schwab Bank	A	Interest	L	T					
104. Schwab US REIT (SCHH)	A	Dividend			Sold	03/08/21	J		
105. Schwab Emerging Markets (SCHE)	A	Dividend			Sold	03/08/21	J	A	
106. Schwab Funda Emg Markets (FNDE)	A	Dividend			Sold	03/08/21	J	A	
107. Schwab Fundamental INL Large (FNDF)	A	Dividend			Sold	03/08/21	J	A	
108. Schwab Fundamental INTL Small (FNDC)	A	Dividend			Sold	03/08/21	J	A	
109. Schwab Fundamental US Large (FNDX)	A	Dividend			Sold	03/08/21	J	B	
110. Schwab Fundamental US Small (FNDA)	A	Dividend			Sold	03/08/21	J	B	
111. Schwab International (SCHF)	A	Dividend			Sold	03/08/21	J	A	
112. Schwab International Small Cap (SCHC)	A	Dividend			Sold	03/08/21	J	A	
113. Schwab US Large Cap EFT (SCHX)	A	Dividend			Sold	03/08/21	J	B	
114. Schwab US Small Cap ETF (SCHA)	A	Dividend			Sold	03/08/21	J	B	
115. Invesco FTSE Rafi US (PRFZ)	A	Dividend			Sold	03/08/21	J	A	
116. Brokerage Account #4K (H)									
117. Schwab Bank	A	Interest	L	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		

Name of Person Reporting	Date of Report
Chuang, Theodore D.	07/29/2022

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

Name of Person Reporting	Date of Report
Chuang, Theodore D.	07/29/2022

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/ Theodore D. Chuang

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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