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
Fitzgerald, Michael W.	United States District Court, Central District of California	05/10/2022
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 (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
350 West First Street Room 5250 Los Angeles, California 90012		

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.	Co-Trustee	[redacted] Trust # 1
2.	Co-Executor	[redacted] Estate # 1
3.	Director	Federal Bar Association-Los Angeles
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	NALEO Educational Fund; salary
2.	2021	State of California, In-Home Supportive Services; miscellaneous income
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
Fitzgerald, Michael W.	05/10/2022

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. Bank of America -- Cash Accounts	A	Interest	N	T					
2.									
3. Brokerage Account #2 (Personal) (H)									
4. Vanguard FTSE All World Ex US (VFSAX)	A	Dividend	J	T					
5.									
6. Brokerage Account #3 (IRA) (H)									
7. Doubleline Total Return (DBLTX)	B	Dividend	K	T					
8. Riverpark Short Term High Yld Fd Instl CL (RPHIX)	A	Dividend	K	T					
9. Schwab Govt Money Fund (SWGXX)	A	Dividend	J	T	Sold (part)	01/12/21	J		
10.					Buy (add'l)	03/19/21	J		
11.					Sold (part)	04/12/21	J		
12.					Sold (part)	07/12/21	J		
13.					Buy (add'l)	11/05/21	J		
14.					Sold (part)	11/22/21	J		
15. Stone Ridge Tr V Alt Lendg Prem (LENDX)		None			Sold	03/12/21	J		
16. Voya Securitized Credit (VCFIX)	B	Dividend	K	T					
17. CrossingBridge Low Dur (CBLDX)	A	Dividend	J	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.	Cliffwater Corporate Lending FD Corporate I (CCLFX)	C	Dividend	L	T					
19.	Shenkman Capital Short Dur Hi Inc Inst (SCFIX)	A	Dividend	K	T					
20.	Vanguard Emerging Mkts Stock IDX Adm (VEMAX)	A	Dividend	K	T					
21.	Vanguard 500 Index FD Admiral Shrs (VFIAX)	D	Dividend	N	T	Sold (part)	05/21/21	J		
22.						Sold (part)	11/03/21	J		
23.	Vanguard FTSE All-Wld Ex-US SMCP IDX Adm (VFSAX)	A	Dividend	K	T					
24.	Vanguard Small Cap Index ADM (VSMAX)	A	Dividend	L	T	Sold (part)	05/21/21	J		
25.	Vanguard Developed Markets Index Admiral (VTMGX)	B	Dividend	L	T					
26.										
27.	Wells Fargo Bank -- Cash Accounts	A	Interest	K	T					
28.	Capital One -- Cash Account	A	Interest	L	T					
29.										
30.	Brokerage Account #4 (Personal) (H)									
31.	TD Ameritrade -- FDIC Insured Deposit Account	A	Interest	J	T					
32.	Van Eck Inernat'l Investors Gold Fd (INIYX)	A	Dividend	J	T	Sold (part)	02/23/21	J	B	
33.	Advisors Inner Circle Intl Fund I (KGIIX)	A	Dividend	J	T					
34.	Northern Lights Altegris/AACA Oppt RE I (RAAIX)	C	Dividend	K	T					

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35. Sprott Physical Gold Trust Unit Common Stock (PHYS)		None			Sold	02/16/21	K	C	
36. Silas Realty Trust, Inc., Class A NSA	A	Distribution	J	T					
37. Wasatch Funds Hoisington US Treasury Inv (WHOSX)		None			Sold	01/06/21	K		
38. Wisdom Trust Emer Mkt (DEM)	A	Dividend			Buy (add'l)	04/21/21	J		
39.					Sold	11/15/21	J	A	
40. Alpha Architect ETF (FRDM)	A	Dividend			Sold	11/15/21	J	A	
41. Goldman Sachs Funds (GSMYX)		None			Sold	03/09/21	J		
42. Direxion Shares (GUSH)		None	J	T	Sold (part)	09/16/21	J	B	
43.					Sold (part)	10/05/21	J	A	
44. Icahn Enterprises (IEP)	A	Distribution	J	T					
45. Direxion Shares (JNUG)	A	Distribution	J	T	Buy (add'l)	04/21/21	J		
46. Advisors Inner Circle (KGGIX)	A	Dividend	J	T	Buy (add'l)	07/22/21	J		
47. Ishares Silver Trust (SLV)		None	J	T					
48. Proshares Trust (URTY)		None	J	T	Sold (part)	09/16/21	J	B	
49. Proshares Trust (AGQ)		None	J	T					
50. Berkshire Hathaway (BRK.B)		None	J	T					
51. Wasatch Funds Emrg Mkts Select Inst (WIESX)	A	Dividend	K	T	Buy	01/07/21	K		

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52.					Sold (part)	03/09/21	K		
53. Direxion Shares ETF Trust Healthcare (CURE)	A	Dividend	J	T	Buy	05/21/21	J		
54.					Buy (add'l)	07/22/21	J		
55. Direxion Shares ETF Trust SP Biotech (LABU)		None	J	T	Buy	07/22/21	J		
56. Proshares Trust Ulta MSCI Brazi ETF (UBR)		None	J	T	Buy	02/16/21	J		
57.					Buy (add'l)	04/15/21	J		
58. Bridgeway Funds Sm Cap Value N (BRSVX)	A	Dividend	K	T	Buy	03/10/21	J		
59.					Buy (add'l)	11/15/21	J		
60. Neuberger Berman Funds Lg Cap Value Inv (NPRTX)	B	Dividend	K	T	Buy	03/10/21	K		
61.					Buy (add'l)	11/15/21	J		
62. Permanent Portfolio Versatile Bond Inv (PRVBX)	A	Dividend	J	T	Buy	10/20/21	J		
63. Vaneck Funds Global Resrc (GHAYX)	A	Dividend	J	T	Buy	02/25/21	J		
64. Managed Portfolio Series ATAC Rotation Inst (ATCIX)		None			Buy	02/16/21	J		
65.					Sold	07/02/21	J		
66. Carter Bankshares Inc Com (CARE)		None			Buy	05/25/21	J		
67.					Sold	05/25/21	J		
68. Direxion Shares ETF Trust DIY Emrg Mkt Bull 3X Shs (EDC)	A	Dividend			Buy	02/16/21	J		

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69.					Buy (add'l)	04/21/21	J		
70.					Sold	11/15/21	J		
71. Direxion Shares ETF Trust Direxion Daily So Korea (KORU)		None			Buy	02/16/21	J		
72.					Sold	07/22/21	J		
73.									
74. Brokerage Account #5 (IRA) (H)									
75. TD Ameritrade -- FDIC Insured Deposit Account (Y)									
76. Van Eck FDS Intl Investors Gold Fund Y (INIYX)	A	Dividend	J	T	Sold (part)	02/20/21	J	A	
77.					Sold (part)	11/15/21	J		
78. Wasatach Funds Hoisington US Treasury Inv (WHOSX)		None			Sold	01/06/21	J		
79. MGD Portfolio Series (ATACX)		None			Sold	02/11/21	J	A	
80. Direxion Shares ETF Trust Healthcare (CURE)	A	Dividend	J	T	Buy	05/26/21	J		
81.					Buy (add'l)	11/15/21	J		
82. Neuberger Berman Funds Lg Cap Value Inv (NPRTX)	A	Dividend	J	T	Buy	03/10/21	J		
83.					Buy (add'l)	11/15/21	J		
84. Vaneck Funds Global Resrc (GHAYX)	A	Dividend	J	T	Buy	02/25/21	J		
85.					Sold (part)	11/15/21	J	A	

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86. Wasatch Funds Emrg Mkts Select Inst (WIESX)	A	Dividend	J	T	Buy	01/07/21	J		
87.					Sold (part)	03/09/21	J		
88.					Buy (add'l)	11/15/21	J		
89. Managed Portfolio Series ATAC Rotation Inst (ATCIX)		None			Buy	02/12/21	J		
90.					Sold	05/17/21	J		
91.									
92. Pension Fund #2 (H)									
93. Voya Intermediate Bond I (IICIX)	B	Dividend	L	T					
94. Vanguard Mid Cap Val Idx Adm (VMVZX)	A	Dividend	K	T					
95. Hartford Midcap Y		None			Buy (add'l)	03/23/21	J		See Note
96.					Sold	03/29/21	K		
97. Calvert Small Cap I (CSVIX)	B	Dividend	K	T	Buy (add'l)	12/14/21	J		See Note
98. T. Rowe Price Intl Discovery I (TIDDX)	D	Dividend	K	T	Buy (add'l)	12/14/21	J		See Note
99. Vanguard Sm Cap Grth Idx Adm	A	Dividend	K	T	Buy (add'l)	12/14/21	J		See Note
100. DFA Emerging Mrkts Core Eq I		None			Buy (add'l)	03/23/21	J		See Note
101.					Sold	03/29/21	K		
102. Pimco Income Instl	B	Dividend	L	T					

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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)	
103. Vanguard Equity Income Adm	C	Dividend	K	T					
104. Vanguard US Growth Admiral	D	Dividend	M	T	Buy (add'l)	12/14/21	J		See Note
105. American Funds New Prspct R6 (X)	B	Dividend	K	T	Buy (add'l)	12/14/21	J		See Note
106. Ishares S&P 500 Index K	B	Dividend	L	T	Buy (add'l)	12/14/21	J		See Note
107. JPMorgan Corporate Bond R6	D	Dividend	L	T					
108. Stanford Stable Asset A		None	J	T	Buy (add'l)	12/14/21	J		See Note
109. Wells Fargo Spec Mdcp Val R6		None			Buy (add'l)	09/22/21	J		See Note
110.					Merged (with line 111)	10/01/21	K		
111. Allspring Specl Midcp Val R6	B	Dividend	K	T	Buy (add'l)	12/14/21	J		See Note
112. American Century Emrg Mkt R6		None	K	T	Buy	03/29/21	K		
113.					Buy (add'l)	12/14/21	J		See Note
114. JPMorgan Midcap Growth R6	B	Dividend	K	T	Buy	03/29/21	K		
115.					Buy (add'l)	12/14/21	J		See Note
116.									
117. Union Bank	A	Interest	J	T					
118.									
119. LBS Financial Credit Union	A	Interest	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
	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
Fitzgerald, Michael W.	05/10/2022

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)	
120.									
121. DWS S&P 500 Index Fund-S	A	Dividend	J	T					
122. DWS Global Income Builder	A	Dividend	J	T					
123. DWS Core Equity Fund-S	B	Dividend	J	T					
124. HSBC Holdings PLC	A	Dividend	J	T					
125.									
126. Rental Property # 1, Lakewood, California	D	Rent	N	W					
127.									
128. Rental Property # 2, Lakewood, California	D	Rent			Sold	11/10/21	N	G	

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
Fitzgerald, Michael W.	05/10/2022

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

Assets listed on lines 117 to 128 are co-owned with a [redacted] and reported at fifty percent (50%).

The transactions listed on lines 95, 97-100, 104-106, 108-109, 111, 113 and 115 reflect employer/employee contributions in 2021. The last contribution dates in 2021 are listed in Column D(2). The cumulative values of the 2021 contributions are listed in Column D(3).

Name of Person Reporting	Date of Report
Fitzgerald, Michael W.	05/10/2022

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/ Michael W. Fitzgerald**

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
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