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
GARCIA, ORLANDO L.	U.S. DISTRICT COURT	07/19/2024
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**
ARTICLE III JUDGE	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
United States Courthouse 262 W. Nueva St. Suite 2-170. San Antonio, TX 78207		

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.	
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. 12/1/2002	State legislative and judicial pension accounts which have vested and are created under Texas state law
2. 12/1/2012	I am presently receiving my state legislative pension which began at age 50. I am presently receiving my state judicial pension which began at age 60.
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	Employees Retirement System of Texas (state legislative pension-paid in monthly installments)	$27,330.96
2.	2023	Judicial Retirement System of Texas	$18,333.36
3.	2023	Texas County and District Retirement System	$8,502.72
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	San Antonio ISD - salary
2.	2023	Northern Trust Company
3.	2023	Teacher Retirement System of Texas
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
GARCIA, ORLANDO L.	07/19/2024

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. FROST BANK CHECKING	A	Int./Div.	J	T					
2. FROST BANK MONEY MARKET	A	Int./Div.	P1	T					
3. BLACKROCK, INC.	A	Int./Div.	J	T					
4. AMERICAN EXPRESS	A	Int./Div.	J	T					
5. APPLE, INC.	A	Int./Div.			Sold	08/21/23	J		
6. CHEVRON	A	Int./Div.	J	T					
7. CISCO SYSTEM	A	Int./Div.	J	T					
8. COCA COLA	A	Int./Div.	J	T					
9. DOW CHEMICAL	A	Int./Div.	J	T					
10. EVERSOURCE ENERGY	A	Int./Div.	J	T					
11. EXXON MOBILE	A	Int./Div.	J	T					
12. GENERAL ELECTRIC	A	Int./Div.			Sold	11/13/23	J		
13. IBM	A	Int./Div.	J	T					
14. JOHNSON AND JOHNSON	A	Int./Div.	J	T					
15. LOCKHEED MARTIN	A	Int./Div.	J	T					
16. MICROSOFT CORP.	A	Int./Div.	J	T	Buy (add'l)	01/13/23	J		
17. ORACLE CO.	A	Int./Div.	J	T	Buy (add'l)	11/29/23	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

Name of Person Reporting	Date of Report
GARCIA, ORLANDO L.	07/19/2024

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)	
18. PFIZER	A	Int./Div.	J	T					
19. PROCTOR & GAMBLE	A	Int./Div.	J	T					
20. SIEMENS A G	A	Int./Div.			Sold	03/22/23	J		
21. T ROWE PRICE GROUP	A	Int./Div.			Sold	03/22/23	J		
22. UNITED TECHNOLOGIES	A	Int./Div.	J	T	Buy	01/30/23	J		
23. VERIZON COMMUNICATIONS	A	Int./Div.	J	T	Buy (add'l)	11/02/23	J		
24. COHEN & STEERE PREFERRED	A	Int./Div.	J	T					
25. FIRST EAGLE GLOBAL FD	A	Int./Div.	J	T					
26. OPPENHEIMER DEVELOPING	A	Int./Div.	J	T					
27. VANGUARD BALANCED INDEX	A	Int./Div.	K	T					
28. AT&T INC.	A	Int./Div.	J	T	Buy (add'l)	11/02/23	J		
29. BCE INC	A	Int./Div.	J	T					
30. BECKTON DICKINSON & CO	A	Int./Div.			Sold	03/22/23	J		
31. BANK OF AMERICA, CORP	A	Int./Div.	J	T					
32. CITIGROUP, INC.	A	Int./Div.	J	T	Buy (add'l)	02/13/23	J		
33. FORD MOTOR CO.	A	Int./Div.	J	T					
34. GENERAL MOTOR CO.	A	Int./Div.			Sold	10/27/23	J		

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35. GENERAL MILLS, INC	A	Int./Div.	J	T					
36. HOME DEPOT, INC	A	Int./Div.	J	T					
37. LOCKHEED MARTIN CORP.	A	Int./Div.	J	T					
38. PHILIP MORRIS INTL	A	Int./Div.	J	T					
39. TEXAS INSTRUMENTS	A	Int./Div.	J	T					
40. UNITED TECHNOLOGIES	A	Int./Div.			Sold	07/10/23	J		
41. VALERO ENERGY GROUP	A	Int./Div.			Sold	07/10/23	J		
42. CITIZENS FINANCIAL	A	Int./Div.	J	T	Buy	01/04/23	J		
43. CROWN CASTLE	A	Int./Div.	J	T	Buy	01/04/23	J		
44. ISHARES TREASURY BOND ETF 1-5	A	Int./Div.	K	T	Buy	01/04/23	K		
45. ISHARES TREASURY BOND ETF 7-10	A	Int./Div.	K	T	Buy	01/04/23	K		
46. JP MORGAN ULTRA SHORT	A	Int./Div.	K	T	Buy	01/04/23	K		
47. MEDTRONIC PLC	A	Int./Div.	J	T	Buy	01/04/23	J		
48. ROCHE HLDG AG	A	Int./Div.	J	T	Buy	01/04/23	J		
49. SPDR INTERMDT TRM CORPORATE	A	Int./Div.	K	T	Buy	01/04/23	K		
50. ZOETIS INC.	A	Int./Div.	J	T	Buy	01/04/23	J		
51. UNITED HEALTH GROUP	A	Int./Div.	J	T	Buy	02/06/23	J		

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52. EASTMAN CHEMICAL CO	A	Int./Div.	J	T	Buy	02/13/23	J		
53. EMERSON ELECTRIC	A	Int./Div.	J	T	Buy	02/13/23	J		
54. EVERGY INC	A	Int./Div.	J	T	Buy	02/13/23	J		
55. GENERAL DYNAMICS	A	Int./Div.	J	T	Buy	02/13/23	J		
56. HEALTHPEAK	A	Int./Div.	J	T	Buy	02/13/23	J		
57. WP CAREY INC	A	Int./Div.	J	T	Buy	02/13/23	J		
58. STARBUCKS CORP	A	Int./Div.	J	T	Buy	03/10/23	J		
59. TRUIST	A	Int./Div.	J	T	Buy	03/15/23	J		
60. CSX ENERGY CORP	A	Int./Div.	J	T	Buy	04/20/23	J		
61. FASTENAL CO	A	Int./Div.	J	T	Buy	04/24/23	J		
62. FIDELITY NATL INFO	A	Int./Div.	J	T	Buy	04/24/23	J		
63. ACCENTURE PLC	A	Int./Div.	J	T	Buy	05/01/23	J		
64. VANGUARD LONG TERM	A	Int./Div.	J	T	Buy	05/05/23	J		
65. PUBLIC STORAGE	A	Int./Div.	J	T	Buy	05/23/23	J		
66. MERCK & CO INC	A	Int./Div.	J	T	Buy	05/25/23	J		
67. CVS HEALTH	A	Int./Div.	J	T	Buy	06/14/23	J		
68. DANAHER CORP	A	Int./Div.	J	T	Buy	06/27/23	J		

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69. APPLIED MATERIALS	A	Int./Div.	J	T	Buy	07/24/23	J		
70. MCDONALDS CORP	A	Int./Div.	J	T	Buy	08/04/23	J		
71. WATSCO INC	A	Int./Div.	J	T	Buy	08/16/23	J		
72. UNITED PARCEL SVS	A	Int./Div.	J	T	Buy	08/29/23	J		
73. PARKER-HANNIFEN CORP	A	Int./Div.	J	T	Buy	08/30/23	J		
74. ILLINOIS TOOLWORKS	A	Int./Div.	J	T	Buy	09/02/23	J		
75. OMNICOM	A	Int./Div.	J	T	Buy	09/02/23	J		
76. VISA INC	A	Int./Div.	J	T	Buy	09/02/23	J		
77. BROADCOM	A	Int./Div.	J	T	Buy	09/08/23	J		
78. QUALCOMM	A	Int./Div.	J	T	Buy	09/26/23	J		
79. NIKE	A	Int./Div.	J	T	Buy	10/20/23	J		
80. JACOBS SOLUTIONS	A	Int./Div.	J	T	Buy	10/25/23	J		
81. DIAGEO PLC	A	Int./Div.	J	T	Buy	10/26/23	J		
82. MORGAN STANLEY	A	Dividend	J	T	Buy	10/26/23	J		
83. ABBOTT LABORATORIES	A	Dividend	J	T	Buy	11/02/23	J		
84. AKTRIA GROUP INC	A	Int./Div.	J	T	Buy	11/02/23	J		
85. ARTHUR GALLAGHER	A	Int./Div.	J	T	Buy	11/02/23	J		

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86. BANK OF MELLON	A	Int./Div.	J	T	Buy	11/02/23	J		
87. COMCAST CORP	A	Int./Div.	J	T	Buy	11/02/23	J		
88. CONOCO PHILLIPS	A	Int./Div.	J	T	Buy	11/02/23	J		
89. FIFTH THIRD BANCORP	A	Int./Div.	J	T	Buy	11/02/23	J		
90. GAMING LEISURE	A	Int./Div.	J	T	Buy	11/02/23	J		
91. GENUINE PARTS	A	Int./Div.	J	T	Buy	11/02/23	J		
92. GILEAD SCIENCES	A	Int./Div.	J	T	Buy	11/02/23	J		
93. HUNTINGTON BANCSHARES	A	Int./Div.	J	T	Buy	11/02/23	J		
94. JOHNSON CONTROLS INTER	A	Int./Div.	J	T	Buy	11/02/23	J		
95. KINDER MORGAN INC	A	Int./Div.	J	T	Buy	11/02/23	J		
96. LAMAR ADVERTISING	A	Int./Div.	J	T	Buy	11/02/23	J		
97. METLIFE INC	A	Int./Div.	J	T	Buy	11/02/23	J		
98. MONDELEZ INTL	A	Int./Div.	J	T	Buy	11/02/23	J		
99. PNC FINANCIAL SVS	A	Int./Div.	J	T	Buy	11/02/23	J		
100. PEPSICO INC	A	Int./Div.	J	T	Buy	11/02/23	J		
101. PROLOGIS INC	A	Int./Div.	J	T	Buy	11/02/23	J		
102. CATERPILLAR	A	Int./Div.	J	T	Buy	11/06/23	J		

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GARCIA, ORLANDO L.	07/19/2024

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)	
103. DUKE ENERGY	A	Int./Div.	J	T	Buy	11/07/23	J		
104. CONSTELLATION BRAND	A	Int./Div.	J	T	Buy	11/15/23	J		
105. JANUS HENDERSON MORTGAGE ETF	A	Int./Div.	J	T	Buy	11/29/23	J		
106. NORVATIS AG	A	Int./Div.	J	T	Buy	12/06/23	J		
107. KENVUE INC	A	Int./Div.	J	T	Buy	12/15/23	J		
108. ABBVIE INC	A	Int./Div.	J	T	Buy	12/18/23	J		
109. 3M CO	A	Int./Div.	J	T	Buy	12/26/23	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		

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

EXPLANATION OR CLARIFICATION REGARDING THE FOLLOWING MATTERS:

IN FDR REPORT FOR 2022 DATED 04/13/2023 ASSET # 32 WAS REPORTED AS CITIBANK AND FOR REPORTING PERIOD 2023 ITS NAME HAS CHANGED TO CITIGROUP..

Name of Person Reporting	Date of Report
GARCIA, ORLANDO L.	07/19/2024

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/ ORLANDO L. GARCIA

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
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