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
Gergel, Richard M.	District of South Carolina	4/24/2024
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**
United States District Judge- Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
85 Broad Street Charleston, SC 29401		

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.		
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.		
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.	Orlanda, Floriida Ameican Board of Trial Advocates	March 8-9, 2023	Orlando, Florida	Speech	Hotel, meals, travel
2.	American Law Institute	May 21-23, 2023	Washington, D.C.	Speech, participation in Annual Meeting	Travel, hotel, meals
3.	Texas American Board of Trial Advocates	June 16-17, 2023	Santa Fe, New Mexico	Speech	Travel, hotel, meals
4.	Truman Presidential Library	July 26-28, 2023	Washington, D.C.	Speech, participationi in discussion	Travel, hotel, meals

5.	Truman Presidential Library	November 29-December 1, 2023	Kansas City, Mo.	Speech	Travel, hotel, meals

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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.			

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Gergel, Richard M.	4/24/2024

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. Lincoln National Universal Life Insurance	B	Int./Div.	K	T					
2. Am Balanced Class A	B	Interest	J	T					
3. Am. High Income Trust Class A	A	Int./Div.	K	T					
4. VistaBank South Carolina		None	J	T					
5. Bank of America Checking	A	Int./Div.	M	T					
6. TIAA-CREF Fixed Annuity	D	Int./Div.	M	T					
7. Wachovia Certificates of Deposit	A	Int./Div.	J	T					
8. Blackrock Global Allocation Fund (BGMIX)	A	Int./Div.	J	T	Sold (part)	01/10/23	J	A	
9.					Sold (part)	02/01/23	J	A	
10.					Sold (part)	02/07/23	J	A	
11.					Sold (part)	03/01/23	J	A	
12.					Sold (part)	04/14/23	J	A	
13.					Sold (part)	04/26/23	J	A	
14.					Sold (part)	06/26/23	J	A	
15.					Buy (add'l)	07/21/23	J		
16.					Buy (add'l)	07/26/23	J		
17.					Sold (part)	08/24/23	J	A	

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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☐ 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.					Buy (add'l)	08/25/23	J		
19. Blackrock Equity Driven Fund (BILPX)	A	Int./Div.	J	T	Sold (part)	01/10/23	J	A	
20.					Sold (part)	02/01/23	J	A	
21.					Sold (part)	02/07/23	J	A	
22.					Sold (part)	03/01/23	J	A	
23.					Sold (part)	04/14/23	J	A	
24.					Sold (part)	04/26/23	J	A	
25.					Sold (part)	06/26/23	J	A	
26.					Buy (add'l)	07/21/23	J		
27.					Sold (part)	07/25/23	J	A	
28.					Sold (part)	07/25/23	J	A	
29.					Buy (add'l)	10/25/23			
30. American Fund Global Allocation Fund	A	Int./Div.	K	T					
31. First Eagle Global Fund (SGIIX)	A	Dividend	J	T	Sold (part)	02/07/23	J	A	
32.					Buy (add'l)	12/12/23	J		
33. FIA Card SErvices Money Market	A	Interest	J	T					
34. Merill Lynch Bank Deposit Fund	A	Interest	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
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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)	
35. BOA Cash Reserve Money Market Fund	A	Interest	J	T					
36. IShares US Preferred Stock ETF (PFF)	A	Int./Div.	J	T					
37. Healthcare Select SPDR Fund (XLV)	A	Dividend			Sold (part)	01/11/23	J	A	
38.					Sold (part)	01/12/23	J	A	
39.					Sold (part)	02/02/23	J	A	
40.					Sold (part)	03/02/23	J	A	
41.					Sold (part)	03/10/23	J	A	
42.					Sold (part)	04/17/23	J	A	
43.					Sold (part)	04/27/23	J	A	
44.					Buy (add'l)	06/02/23	J		
45.					Sold (part)	06/27/23	J	A	
46.					Sold (part)	07/18/23	J	A	
47.					Sold (part)	07/26/23	J	A	
48.					Sold (part)	07/27/23	J	A	
49.					Sold	08/25/23	J	A	
50. Consumer Discretionary SPDR Fund (XLY)	A	Dividend			Sold (part)	01/11/23	J	A	
51.					Buy (add'l)	01/12/23	J		

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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

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52.					Sold (part)	02/02/23	J	A	
53.					Sold (part)	03/02/23	J	A	
54.					Sold (part)	03/10/23	J	A	
55.					Sold (part)	04/17/23	J	A	
56.					Sold (part)	06/02/23	J	A	
57.					Sold (part)	07/18/23	J	A	
58.					Sold	08/25/23	J	A	
59.	Comm. Services Select Sector Fund (XLC)	A	Dividend		Sold (part)	01/11/23	J	A	
60.					Buy (add'l)	01/12/23	J		
61.					Sold (part)	02/02/23	J	A	
62.					Sold (part)	03/02/23	J	A	
63.					Sold (part)	03/10/23	J	A	
64.					Sold (part)	04/17/23	J	A	
65.					Sold (part)	04/27/23	J	A	
66.					Sold (part)	06/02/23	J	A	
67.					Sold (part)	06/27/23	J	A	
68.					Sold (part)	07/26/23	J	A	

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69.					Sold	08/25/23	J	A	
70. Vanguard MSCI Pacific Fund (VPL)	A	Dividend			Sold (part)	01/11/23	J	A	
71.					Sold (part)	01/12/23	J	A	
72.					Sold (part)	02/02/23	J	A	
73.					Sold (part)	03/02/23	J	A	
74.					Sold (part)	03/10/23	J	A	
75.					Sold (part)	04/17/23	J	A	
76.					Sold (part)	04/27/23	J	A	
77.					Buy (add'l)	06/02/23	J		
78.					Sold (part)	06/27/23	J	A	
79.					Sold (part)	07/18/23	J	A	
80.					Sold (part)	07/26/23	J	A	
81.					Sold	08/25/23	J	A	
82. Vanguard FTSE All World Fund (VEU)	A	Dividend			Sold (part)	01/12/23	J	A	
83.					Sold (part)	02/02/23	J	A	
84.					Sold (part)	03/03/23	J	A	
85.					Sold (part)	04/17/23	J	A	

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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	
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86.					Sold (part)	04/27/23	J	A	
87.					Buy (add'l)	06/02/23	J		
88.					Sold (part)	06/27/23	J	A	
89.					Sold (part)	07/18/23	J	A	
90.					Sold (part)	07/26/23	J	A	
91.					Sold	08/25/23	J	A	
92. Select Sector SPDR Fund ((XLK)	A	Dividend			Sold (part)	01/11/23	J	A	
93.					Sold (part)	01/12/23	J	A	
94.					Sold (part)	02/02/23	J	A	
95.					Sold (part)	03/02/23	J	A	
96.					Sold (part)	03/10/23	J	A	
97.					Sold (part)	04/17/23	J	A	
98.					Sold (part)	04/27/23	J	A	
99.					Sold (part)	05/11/23	J	A	
100.					Sold (part)	06/02/23	J	A	
101.					Sold (part)	06/27/23	J	A	
102.					Sold (part)	07/18/23	J	A	

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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
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103.					Sold (part)	07/26/23	J	A	
104.					Sold	08/25/23	J	A	
105. Graniteshares Gold Shares (BAR)	A	Dividend			Sold (part)	01/11/23	J	A	
106.					Sold (part)	02/02/23	J	A	
107.					Sold (part)	03/02/23	J	A	
108.					Sold (part)	03/10/23	J	A	
109.					Sold (part)	04/17/23	J	A	
110.					Sold (part)	04/27/23	J	A	
111.					Sold (part)	06/27/23	J	A	
112.					Sold (part)	07/18/23	J	A	
113.					Sold (part)	07/26/23	J	A	
114.					Sold	08/25/23	J	A	
115. Vanguard Intermediate Term Corporate Bond Fund (VCIT)	A	Dividend			Sold (part)	01/11/23	J	A	
116.					Sold (part)	01/12/23	J	A	
117.					Sold (part)	02/02/23	J	A	
118.					Sold (part)	03/02/23	J	A	
119.					Sold (part)	03/10/23	J	A	

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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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)	
120.					Sold (part)	04/17/23	J	A	
121.					Sold (part)	04/27/23	J	A	
122.					Sold (part)	06/02/23	J	A	
123.					Sold (part)	06/27/23	J	A	
124.					Sold (part)	07/18/23	J	A	
125.					Sold (part)	07/26/23	J	A	
126.					Sold	08/25/23	J	A	
127. IShares 3-7 Year Treasury Bond Fund (IEI)	A	Dividend			Sold (part)	01/11/23	J	A	
128.					Buy (add'l)	01/12/23	J		
129.					Sold (part)	02/02/23	J	A	
130.					Sold (part)	03/02/23	J	A	
131.					Sold (part)	03/10/23	J	A	
132.					Sold (part)	04/17/23	J	A	
133.					Sold (part)	04/27/23	J	A	
134.					Buy (add'l)	06/02/23	J		
135.					Sold (part)	06/27/23	J	A	
136.					Sold (part)	07/18/23	J	A	

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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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)	
137.					Sold (part)	07/26/23	J	A	
138.					Sold	08/25/23	J	A	
139. Ishares Investment Grade Corporate Bond (LQD)	A	Dividend			Sold (part)	01/11/23	J	A	
140.					Sold	02/02/23	J	A	
141. Ishares 7-10 year treasury bonds (IEF)	A	Dividend			Sold (part)	01/11/23	J	A	
142.					Sold (part)	02/02/23	J	A	
143.					Sold (part)	02/15/23	J	A	
144.					Buy (add'l)	06/02/23	J		
145.					Sold (part)	06/27/23	J	A	
146.					Sold	07/18/23	J	A	
147. Sector SPDR Energy (XLE)	A	Dividend			Sold (part)	01/11/23	J	A	
148.					Sold (part)	03/02/23	J	A	
149.					Sold (part)	04/17/23	J	A	
150.					Sold	04/27/23	J	A	
151. IShares MSCI Intl Qualit Factor (IQLT)	A	Dividend			Sold (part)	01/11/23	J	A	
152.					Sold (part)	01/12/23	J	A	
153.					Sold (part)	02/02/23	J	A	

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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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)	
154.					Sold (part)	03/02/23	J	A	
155.					Sold (part)	03/10/23	J	A	
156.					Sold (part)	04/17/23	J	A	
157.					Sold (part)	06/27/23	J	A	
158.					Sold (part)	07/18/23	J	A	
159.					Sold (part)	07/26/23	J	A	
160.					Sold	08/25/23	J	A	
161. Ishares Misc China (MCHI)	A	Dividend			Sold (part)	01/11/23	J	A	
162.					Sold (part)	02/02/23	J	A	
163.					Sold (part)	03/02/23	J	A	
164.					Sold (part)	03/10/23	J	A	
165.					Sold (part)	04/17/23	J	A	
166.					Sold (part)	04/27/23	J	A	
167.					Sold	06/27/23	J	A	
168. Ishares 10-20 year treasury bond (TLH)	A	Dividend			Sold (part)	01/11/23	J	A	
169.					Sold (part)	02/02/23	J	A	
170.					Buy (add'l)	02/15/23	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

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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)	
171.					Sold (part)	03/02/23	J	A	
172.					Sold (part)	03/10/23	J	A	
173.					Sold (part)	04/17/23	J	A	
174.					Sold (part)	04/27/23	J	A	
175.					Sold (part)	06/27/23	J	A	
176.					Buy (add'l)	07/26/23	J		
177.					Sold (part)	07/27/23	J	A	
178.					Sold	08/25/23	J	A	
179. Ishares Misc Emerging Markets (EMXC)	A	Dividend			Sold (part)	01/11/23	J	A	
180.					Sold (part)	02/02/23	J	A	
181.					Sold (part)	03/02/23	J	A	
182.					Sold (part)	04/17/23	J	A	
183.					Sold (part)	04/27/23	J	A	
184.					Buy (add'l)	06/27/23	J	A	
185.					Sold (part)	07/18/23	J	A	
186.					Sold (part)	07/26/23	J	A	
187.					Sold	08/25/23	J	A	

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	
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3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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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.)*

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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)	
188. Vanguard Misc European (VGK)	A	Dividend			Sold (part)	01/11/23	J	A	
189.					Sold (part)	02/02/23	J	A	
190.					Sold (part)	03/10/23	J	A	
191.					Sold (part)	04/17/23	J	A	
192.					Sold (part)	06/27/23	J	A	
193.					Sold (part)	07/26/23	J	A	
194.					Sold	08/25/23	J		
195. Sector SPDRSTPL Fimd (XLP)	A	Dividend			Sold (part)	01/11/23	J	A	
196.					Buy (add'l)	01/12/23	J		
197.					Sold (part)	02/02/23	J	A	
198.					Sold (part)	03/02/23	J	A	
199.					Sold (part)	03/10/23	J	A	
200.					Sold (part)	04/14/23	J	A	
201.					Sold (part)	04/27/23	J	A	
202.					Buy (add'l)	06/02/23	J		
203.					Sold (part)	06/27/23	J	A	
204.					Sold (part)	07/18/23	J	A	

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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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.)*

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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)	
205.					Sold (part)	07/26/23	J	A	
206.					Sold	08/25/23	J	A	
207. WisdomTree Floating Rate Treasury (USFR)	A	Dividend			Sold (part)	01/11/23	J	A	
208.					Sold (part)	02/02/23	J	A	
209.					Sold (part)	03/02/23	J	A	
210.					Sold (part)	03/10/23	J	A	
211.					Sold (part)	04/17/23	J	A	
212.					Sold (part)	04/27/23	J	A	
213.					Sold (part)	06/27/23	J	A	
214.					Sold (part)	07/18/23	J	A	
215.					Sold (part)	07/26/23	J	A	
216.					Sold (part)	07/27/23	J	A	
217.					Sold	08/25/23	J	A	
218. Ishares Core Misc Europe (IEUR)	A	Dividend			Sold (part)	01/11/23	J	A	
219.					Sold (part)	01/12/23	J	A	
220.					Sold (part)	02/02/23	J	A	
221.					Sold (part)	04/17/23	J	A	

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
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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
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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.)*

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222.					Sold (part)	06/27/23	J	A	
223.					Sold (part)	07/26/23	J	A	
224.					Sold	08/25/23	J	A	
225. Ishares S & P Global Health (IXJ)	A	Dividend			Sold (part)	01/11/23	J	A	
226.					Sold (part)	02/02/23	J	A	
227.					Sold (part)	03/02/23	J	A	
228.					Sold (part)	03/10/23	J	A	
229.					Sold (part)	04/17/23	J	A	
230.					Sold (part)	04/27/23	J	A	
231.					Sold (part)	06/27/23	J	A	
232.					Sold (part)	07/18/23	J	A	
233.					Sold (part)	07/26/23	J	A	
234.					Sold	08/25/23	J	A	
235. Vanguard Value ETF (VTV)	A	Dividend			Sold (part)	02/02/23	J	A	
236.					Sold (part)	03/10/23	J	A	
237.					Sold (part)	04/27/23	J	A	
238.					Sold (part)	07/26/23	J	A	

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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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.)*

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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)	
239.					Sold	08/25/23	J	A	
240. JP Morgan Exchange Traded Fund (BBJP)	A	Dividend			Sold (part)	01/11/23	J	A	
241.					Sold (part)	02/02/23	J	A	
242.					Sold (part)	03/02/23	J	A	
243.					Sold (part)	03/10/23	J	A	
244.					Sold (part)	04/17/23	J	A	
245.					Sold (part)	04/27/23	J	A	
246.					Sold (part)	06/27/23	J	A	
247.					Sold (part)	07/18/23	J	A	
248.					Sold (part)	07/26/23	J	A	
249.					Sold	08/25/23	J	A	
250. JP Morgan Exchange Traded FD TR S (JEPI)	A	Int./Div.			Sold (part)	01/11/23	J	A	
251.					Sold (part)	02/02/23	J	A	
252.					Sold (part)	03/02/23	J	A	
253.					Buy (add'l)	03/10/23	J		
254.					Sold (part)	03/17/23	J	A	
255.					Sold (part)	04/27/23	J	A	

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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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)	
256.					Sold (part)	06/27/23	J	A	
257.					Sold (part)	07/18/23	J	A	
258.					Sold (part)	07/26/23	J	A	
259.					Sold	08/25/23	J	A	
260. IShares US Treasury Bonds (GOVT)	A	Dividend	J	T	Buy	08/25/23	J		
261.					Sold (part)	09/20/23	J	A	
262.					Sold (part)	10/31/23	J	A	
263. Ishares TR S & P Global (KXI)	A	Dividend			Sold (part)	01/11/23	J	A	
264.					Sold (part)	02/02/23	J	A	
265.					Sold (part)	03/02/23	J	A	
266.					Sold (part)	03/10/23	J	A	
267.					Sold (part)	04/17/23	J	A	
268.					Sold (part)	04/27/23	J	A	
269.					Sold (part)	06/27/23	J	A	
270.					Sold (part)	07/18/23	J	A	
271.					Sold (part)	07/25/23	J	A	
272.					Sold	08/25/23	J	A	

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
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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)	
273. IShare TIPS Bond ECF (TIP)	A	Dividend	J	T	Buy	02/08/23	J		
274. Abbey Capital Futures (ABYIX)	A	Int./Div.	J	T	Sold (part)	02/01/23	J	A	
275.					Sold (part)	02/07/23	J	A	
276.					Sold (part)	03/01/23	J	A	
277.					Sold (part)	04/26/23	J	A	
278.					Sold (part)	06/26/23	J	A	
279.					Buy (add'l)	07/21/23	J		
280.					Sold (part)	07/25/23	J	A	
281.					Sold (part)	08/24/23	J	A	
282.					Sold (part)	10/25/23	J	A	
283.					Buy (add'l)	12/12/23	J	A	
284. AQR Diversified (ADAIX)	A	Int./Div.	J	T	Sold (part)	02/01/23	J	A	
285.					Sold (part)	02/07/23	J	A	
286.					Sold (part)	03/01/23	J	A	
287.					Sold (part)	04/14/23	J	A	
288.					Sold (part)	04/26/23	J	A	
289.					Sold (part)	06/26/23	J	A	

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

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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)	
290.					Buy (add'l)	07/21/23	J	A	
291.					Buy	02/03/22	J		
292.					Sold (part)	07/25/23	J	A	
293.					Sold (part)	08/24/23	J	A	
294. BrandywineGLBL (LROIX)	A	Int./Div.			Sold (part)	03/01/23	J	A	
295.					Sold (part)	04/14/23	J	A	
296.					Sold (part)	06/26/23	J	A	
297.					Sold	07/21/23	J		
298. Gotham Absolute Return (GARIX)	A	Int./Div.			Sold (part)	01/17/23	J	A	
299.					Sold (part)	02/01/23	J	A	
300.					Sold (part)	02/07/23	J	A	
301.					Sold (part)	03/01/23	J	A	
302.					Sold (part)	04/14/23	J	A	
303.					Sold (part)	04/26/23	J	A	
304.					Sold (part)	06/26/23	J	A	
305.					Sold (part)	07/21/23	J	A	
306.					Sold (part)	07/25/23	J	A	

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
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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)	
307.					Sold (part)	08/24/23	J	A	
308.					Sold	10/25/23	J	A	
309. ISHARES 20+ year treasury bonds (TLT)	A	Int./Div.			Sold (part)	01/11/23	J	A	
310.					Buy (add'l)	01/12/23	J		
311.					Sold (part)	02/02/23	J	A	
312.					Sold (part)	03/02/23	J	A	
313.					Sold (part)	03/10/23	J	A	
314.					Sold (part)	04/14/23	J	A	
315.					Sold (part)	04/27/23	J	A	
316.					Buy (add'l)	06/02/23	J		
317.					Sold (part)	06/27/23	J	A	
318.					Sold (part)	07/18/23	J	A	
319.					Sold (part)	07/26/23	J		
320.					Sold	08/25/23	J	A	
321. ISHARES US Aerospace ETF (ITA)	A	Int./Div.			Sold (part)	01/11/23	J	A	
322.					Sold (part)	03/02/23	J	A	
323.					Sold (part)	04/14/23	J	A	

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

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324.					Sold (part)	07/18/23	J	A	
325.					Sold	08/25/23	J	A	
326. ISHARES MBS ERF (MBB)	A	Int./Div.			Sold (part)	01/11/23	J	A	
327.					Sold (part)	02/02/23	J	A	
328.					Sold (part)	03/02/23	J	A	
329.					Sold (part)	03/10/23	J	A	
330.					Sold (part)	04/17/23	J	A	
331.					Sold (part)	04/27/23	J	A	
332.					Sold (part)	06/27/23	J	A	
333.					Sold (part)	07/18/23	J	A	
334.					Sold (part)	07/26/23	J	A	
335.					Sold	08/25/23	J	A	
336. ISHARES Treasuryt Floatin Rate Bond (TFL0)	A	Int./Div.			Sold (part)	01/11/23	J	A	
337.					Sold (part)	01/12/23	J	A	
338.					Sold (part)	02/02/23	J	A	
339.					Sold (part)	03/02/23	J	A	
340.					Sold (part)	03/10/23	J	A	

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
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341.					Sold (part)	04/17/23	J	A	
342.					Sold (part)	04/27/23	J	A	
343.					Sold (part)	06/02/23	J	A	
344.					Sold (part)	06/27/23	J	A	
345.					Sold (part)	07/18/23	J	A	
346.					Sold (part)	07/26/23	J	A	
347.					Sold	08/25/23	J	A	
348. Janus Detroit Street Tr ((JAAA)	A	Int./Div.			Sold (part)	01/11/23	J	A	
349.					Sold (part)	02/02/23	J	A	
350.					Sold (part)	03/02/23	J	A	
351.					Sold (part)	03/10/23	J	A	
352.					Sold (part)	04/17/23	J	A	
353.					Sold (part)	04/27/23	J	A	
354.					Sold (part)	06/27/23	J	A	
355.					Sold (part)	07/18/23	J	A	
356.					Sold (part)	07/26/23	J	A	
357.					Sold	08/25/23	J	A	

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
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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		
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358. John Hancock Diversified ((JDJIX)	A	Int./Div.	J	T	Sold (part)	02/01/23	J	A	
359.					Buy (add'l)	02/07/23	J		
360.					Sold (part)	03/01/23	J	A	
361.					Sold (part)	06/26/23	J	A	
362.					Buy (add'l)	07/26/23	J		
363.					Sold (part)	08/24/23		A	
364.					Sold (part)	10/25/23		A	
365. John Hancock Seaport Long/Short Fund (JSFDX)	A	Dividend	J	T	Sold (part)	05/27/22	J		
366.					Sold (part)	07/21/22	J		
367.					Sold (part)	08/23/22	J		
368.					Sold (part)	08/24/22	J		
369.					Sold (part)	08/26/22	J		
370.					Sold (part)	09/28/22	J		
371.					Buy	02/03/22	J		
372.					Buy (add'l)	02/04/22	J		
373.					Buy (add'l)	02/07/22	J		
374.					Sold (part)	08/22/22	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	
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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)	
375. Neuberger Berman Long Short Fund (NLSIX)	A	Int./Div.			Sold (part)	01/10/23	J	A	
376.					Sold (part)	02/01/23	J	A	
377.					Buy (add'l)	02/07/23	J		
378.					Sold (part)	03/01/23	J	A	
379.					Sold (part)	04/14/23	J	A	
380.					Sold (part)	04/26/23	J	A	
381.					Sold (part)	06/26/23	J	A	
382.					Buy	07/21/23	J		
383.					Sold (part)	07/25/23	J	A	
384.					Sold (part)	08/24/23	J	A	
385.					Sold	10/25/23	J	A	
386. Pacer US Cash Cows 100 (COWZ)	A	Int./Div.			Sold (part)	01/11/23	J	A	
387.					Sold (part)	02/02/23	J	A	
388.					Sold (part)	03/02/23	J	A	
389.					Buy (add'l)	03/10/23	J	A	
390.					Sold (part)	04/17/23	J	A	
391.					Sold (part)	04/27/23	J	A	

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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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)	
392.					Sold (part)	06/27/23	J	A	
393.					Sold (part)	07/18/23	J	A	
394.					Sold (part)	07/26/23	J	A	
395.					Sold	08/25/23	J	A	
396. Sector SPDR Utilities (XLU)	A	Int./Div.			Sold (part)	01/11/23	J	A	
397.					Sold (part)	01/12/23	J	A	
398.					Sold (part)	02/02/23	J	A	
399.					Sold (part)	03/02/23	J	A	
400.					Sold (part)	03/10/23	J	A	
401.					Sold (part)	04/17/23	J	A	
402.					Sold (part)	04/27/23	J	A	
403.					Buy (add'l)	06/02/23	J		
404.					Sold (part)	06/07/23	J	A	
405.					Sold (part)	07/18/23	J	A	
406.					Sold (part)	07/26/23	J	A	
407.					Sold	08/25/23	J	A	
408. SPDR S & P Dividend ETF (SDY)	A	Int./Div.			Sold (part)	01/11/23	J	A	

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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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)	
409.					Sold (part)	02/02/23	J	A	
410.					Sold (part)	03/02/23	J	A	
411.					Sold (part)	03/10/23	J	A	
412.					Sold (part)	04/17/23	J	A	
413.					Sold (part)	04/27/23	J	A	
414.					Sold (part)	06/27/23	J	A	
415.					Buy (add'l)	07/26/23	J		
416.					Sold	08/22/22	J	A	
417.	Vanguard Total International Bond EFT (BNDX)	A	Int./Div.	J	T	Buy	08/25/23	J	
418.					Sold (part)	09/20/23	J	A	
419.					Sold (part)	10/23/23	J	A	
420.					Sold (part)	10/31/23	J	A	
421.					Sold (part)	12/21/23	J	A	
422.	US Pacer Small Cash (CALF)	A	Int./Div.			Buy	03/10/23	J	
423.					Sold (part)	04/17/23	J	A	
424.					Sold (part)	04/27/23	J	A	
425.					Sold (part)	06/27/23	J	A	

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	
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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)	
426.					Sold (part)	07/18/23	J	A	
427.					Sold (part)	07/26/23	J	A	
428.					Sold	08/25/23	J	A	
429. Victory Market Neutral Inome Fund (CBHIX)	A	Int./Div.	J	T	Buy	10/25/23	J		
430. Victory Shares Equity Income ETF (CDC)	A	Int./Div.	J	T	Buy	08/25/23	J		
431.					Sold (part)	09/20/23	J	A	
432.					Sold (part)	10/23/23	J	A	
433.					Sold (part)	12/21/23	J	A	
434. Victory Shares US 500 (CFO)	A	Int./Div.		T	Buy	08/25/23	J		
435.					Sold (part)	09/20/23	J	A	
436.					Sold (part)	10/31/23	J	A	
437.					Sold (part)	12/21/23	J	A	
438. Eaton Vance GLB (EGRIX)	A	Int./Div.			Buy	07/21/23	J	A	
439.					Sold (part)	07/25/23	J	A	
440.					Sold	08/24/23	J	A	
441. IShares MSCI Eurozone EFT (EZU)	A	Int./Div.			Buy	05/11/23	J	A	
442.					Sold (part)	06/27/23	J	A	

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
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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.)*

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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)	
443.					Sold (part)	07/18/23	J	A	
444.					Sold (part)	07/26/23	J	A	
445.					Sold	08/25/23	J	A	
446. Gotham Index Plus Fund (GINDX)	A	Int./Div.	J	T	Buy	10/25/23	J		
447. SPDR S & P Global Natural Resources EFT (GNR)	A	Int./Div.			Sold (part)	01/11/23	J	A	
448.					Sold (part)	02/02/23	J	A	
449.					Sold (part)	03/02/23	J	A	
450.					Sold (part)	03/10/23	J	A	
451.					Sold (part)	04/17/23	J	A	
452.					Sold (part)	04/27/23	J	A	
453.					Sold	05/11/23	J	A	
454. Federated Hermes Govt Obligations Fund ((GOVXX)	A	Int./Div.	J	T	Buy	07/17/23	J		
455.					Buy (add'l)	07/18/23	J		
456.					Sold (part)	07/25/23	J	A	
457.					Sold (part)	08/24/23	J	A	
458.					Buy (add'l)	12/12/23	J		
459. Ishares Core S & P US Growth ETF	A	Int./Div.	J	T	Buy	08/25/23	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	
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460.					Sold (part)	09/20/23	J	A	
461.					Sold (part)	10/31/23	J	A	
462.					Sold (part)	12/21/23	J	A	
463. Ishares Core S & P Value ETF (IUSV)	A	Int./Div.	J	T	Buy	08/25/23	J		
464.					Sold (part)	09/20/23	J	A	
465.					Sold (part)	10/31/23	J	A	
466.					Sold (part)	12/21/23	J	A	
467. Quadratic Int RTE (IVOL)	A	Int./Div.			Buy	07/27/23	J		
468.					Sold	08/25/23	J	A	
469. JP Morgan Hedged Equity Fund (JHQDX)	A	Int./Div.	J	T	Buy	10/25/23	J		
470. Janus Henderson Morgtgage Backed (JMBS)	A	Int./Div.			Buy	05/11/23	J		
471.					Sold (part)	06/27/23	J	A	
472.					Sold (part)	07/26/23	J	A	
473.					Buy (add'l)	07/27/23	J	A	
474.					Sold	08/25/23	J	A	
475. Abbey Capital Multi Asset Fund (MAFIX)	A	Int./Div.	J	T	Buy	10/25/23	J		
476.					Buy (add'l)	12/12/23	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			
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477. Pimco Dynamic Bond Fund (PUCPX)	A	Int./Div.			Sold (part)	01/10/23	J	A	
478.					Sold (part)	02/01/23	J	A	
479.					Sold (part)	04/14/23	J	A	
480.					Sold (part)	04/26/23	J	A	
481.					Sold (part)	06/26/23	J	A	
482.					Sold (part)	07/21/23	J	A	
483.					Sold (part)	07/25/23	J	A	
484.					Sold	08/24/23	J	A	
485. Pacer Trendpilot US Large Cap ETF (PTLC)	A	Int./Div.	J	T	Buy	08/25/23	J		
486.					Sold (part)	09/20/23	J	A	
487.					Sold (part)	10/31/23		A	
488.					Sold (part)	12/21/23	J	A	
489. Pacer Trendpilot US Mid Cap ETF (PTMC)	A	Int./Div.	J	T	Buy	08/25/23	J	A	
490.					Sold (part)	09/20/23	J	A	
491.					Sold (part)	10/31/23	J	A	
492.					Sold (part)	12/21/23	J	A	
493. SPDR Portfolio S&P 600 Small Cap ETF (SPSM)	A	Int./Div.			Buy	07/27/23	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	
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494.					Sold	08/25/23	J	A	
495. SPDR Portfolio Long Term Treasury ETF (SPTL)	A	Int./Div.	J	T	Buy	08/25/23	J		
496.					Sold (part)	09/20/23	J	A	
497.					Sold (part)	10/31/23	J	A	
498.					Sold (part)	12/21/23	J	A	
499. SPDR Short Term Treasury ETF (SPTS)	A	Int./Div.			Buy	02/15/23			
500.					Sold (part)	03/02/23	J	A	
501.					Sold (part)	03/10/23	J	A	
502.					Sold (part)	04/17/23	J	A	
503.					Sold (part)	04/27/23	J	A	
504.					Sold (part)	06/27/23	J	A	
505.					Sold (part)	07/18/23	J	A	
506.					Sold (part)	07/26/23	J	A	
507.					Sold	08/25/23	J	A	
508. Ishares Broad USD Invest Grade Corp Bond ETF (USIG)	A	Int./Div.	J	T	Buy	08/25/23	J		
509.					Sold (part)	09/20/23	J	A	
510.					Sold (part)	10/23/23	J	A	

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
Gergel, Richard M.	4/24/2024

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)	
511.					Sold (part)	10/31/23	J	A	
512.					Sold	12/21/23	J	A	
513. Vanguard Long Term Corp Bond (VCLT)	A	Int./Div.			Sold (part)	01/11/23	J	A	
514.					Buy (add'l)	01/12/23	J		
515.					Sold (part)	02/02/23	J	A	
516.					Sold (part)	03/02/23	J	A	
517.					Sold (part)	03/10/23	J	A	
518.					Sold (part)	04/17/23	J	A	
519.					Sold (part)	04/27/23	J	A	
520.					Buy (add'l)	06/27/23	J		
521.					Sold (part)	07/18/23	J	A	
522.					Sold (part)	07/26/23	J	A	
523.					Sold	08/25/23	J	A	
524. Vanguard FTSE Developed Market ETF (VEA)	A	Int./Div.	J	T	Buy	08/25/23	J		
525.					Sold (part)	09/20/23	J	A	
526.					Buy (add'l)	10/23/23	J		
527.					Sold (part)	10/31/23	J	A	

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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Name of Person Reporting	Date of Report
Gergel, Richard M.	4/24/2024

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)	
528. Vanguard Morgage Backed Sec ((VMBS)	A	Int./Div.	J	T	Buy	08/25/23	J		
529.					Sold (part)	09/20/23	J	A	
530.					Buy (add'l)	10/23/23	J		
531.					Sold (part)	10/31/23	J	A	
532.					Sold (part)	12/21/23	J	A	
533. Vanguard Russell 2000 (VTWO)	A	Int./Div.	J	T	Buy	08/25/23	J		
534.					Sold (part)	09/20/23	J	A	
535.					Buy (add'l)	10/23/23	J		
536.					Sold (part)	10/31/23	J	A	
537.					Sold (part)	12/21/23	J	A	
538. Vanguard Emerging Markets ETF (VWO)	A	Int./Div.	J	T	Buy	08/25/23	J		
539.					Sold (part)	09/20/23	J	A	
540.					Sold (part)	10/31/23	J	A	
541.					Sold (part)	12/21/23	J	A	
542. Vanguard High Dividend Yield ETF (VYM)	A	Int./Div.			Buy	06/27/23	J	A	
543.					Sold (part)	07/18/23	J	A	
544.					Sold	07/26/23	J	A	

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
Gergel, Richard M.	4/24/2024

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

Name of Person Reporting	Date of Report
Gergel, Richard M.	4/24/2024

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/ Richard M. Gergel

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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