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
Gerrard, John M.	U.S. District Court, Nebraska	05/13/2024
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**
U.S. District Judge - Senior Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
507 Federal Building 100 Centennial Mall North Lincoln, Nebraska 68508		

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.					
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
Gerrard, John M.	05/13/2024

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. U.S. Bank Checking Account	A	Interest	J	T					
2. Frontier Bank Checking Account	A	Interest	J	T					
3. Stifel Bank Program Money Market Account	A	Interest	K	T					
4. Edward Jones Account	A	Interest	J	T					
5. AAIEX Mutual Fund	A	Dividend			Sold	01/25/23	J	A	
6. ABNFX Mutual Fund	A	Dividend	J	T	Buy	09/15/23	J		
7. AEPFX Mutual Fund	A	Dividend	J	T	Sold (part)	01/25/23	J	A	
8.					Sold (part)	02/07/23	J	A	
9.					Buy (add'l)	02/21/23	J		
10.					Buy (add'l)	09/13/23	J		
11. AMCFX Mutual Fund	A	Dividend			Buy (add'l)	01/25/23	J		
12.					Sold (part)	02/07/23	J	A	
13.					Buy (add'l)	02/21/23	J		
14.					Sold	09/13/23	J	A	
15. BAGIX Mutual Fund	A	Dividend	J	T	Buy	09/15/23	J		
16. BIL ETF	A	Dividend	K	T	Sold (part)	02/07/23	J	A	
17.					Buy (add'l)	02/21/23	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
Gerrard, John M.	05/13/2024

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. CDC ETF	B	Dividend	K	T					
19. CDL ETF	B	Dividend	L	T					
20. CFA ETF	A	Dividend	L	T					
21. CFO ETF	A	Dividend	L	T					
22. CIL ETF	A	Dividend	K	T					
23. CIZ ETF	A	Dividend	K	T					
24. CSA ETF	A	Dividend			Sold	06/21/23	J	A	
25. CSF ETF	A	Dividend	J	T					
26. EQAL ETF	A	Dividend	J	T	Sold (part)	02/07/23	J	A	
27.					Buy (add'l)	02/21/23	J		
28. FSCCX Mutual Fund	A	Dividend	J	T	Buy (add'l)	01/25/23	J		
29.					Sold (part)	02/07/23	J	A	
30.					Buy (add'l)	02/21/23	J		
31.					Buy (add'l)	09/13/23	J		
32.					Sold (part)	09/15/23	J	A	
33. GFFFX Mutual Fund	A	Dividend	J	T	Buy	09/13/23	J		
34. GIBIX Mutual Fund	A	Dividend	J	T	Buy	09/15/23	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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☐ 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)	
35. GICIX Mutual Fund	A	Dividend	J	T	Sold (part)	01/25/23	J	A	
36.					Sold (part)	02/07/23	J	A	
37.					Buy (add'l)	02/21/23	J		
38.					Buy (add'l)	09/13/23	J		
39.					Buy (add'l)	09/15/23	J		
40. IEMG ETF	A	Dividend	J	T					
41. JIGFX Mutual Fund	A	Dividend			Sold (part)	01/25/23	J	A	
42.					Sold (part)	02/07/23	J	A	
43.					Buy (add'l)	02/21/23	J		
44.					Sold (part)	08/16/23	J	A	
45.					Sold	08/16/23	J	A	
46. MADVX Mutual Fund	A	Dividend	J	T	Buy (add'l)	09/15/23	J		
47. MFEIX Mutual Fund	A	Dividend	J	T	Sold (part)	09/15/23	J	A	
48. MISGX Mutual Fund	A	Dividend	J	T	Buy (add'l)	01/25/23	J		
49.					Sold (part)	02/07/23	J	A	
50.					Buy (add'l)	02/21/23	J		
51.					Buy (add'l)	09/13/23	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.					Buy (add'l)	09/15/23	J		
53. MQGIX Mutual Fund	A	Dividend	J	T	Buy (add'l)	09/15/23	J		
54. NERYX Mutual Fund	A	Dividend	J	T	Buy	09/15/23	J		
55. ODVYX Mutual Fund	A	Dividend	J	T	Sold (part)	01/25/23	J	A	
56.					Sold (part)	02/07/23	J	A	
57.					Buy (add'l)	02/21/23	J		
58.					Buy (add'l)	09/13/23	J		
59.					Buy (add'l)	09/15/23	J		
60. PHYZX Mutual Fund	A	Dividend	J	T	Buy	09/15/23	J		
61. PTTRX Mutual Fund	A	Dividend	J	T	Buy	09/15/23	J		
62. RILYK Preferred	A	Dividend	J	T					
63. RILYN Note	A	Dividend	J	T					
64. SMGIX Mutual Fund	A	Dividend	K	T	Buy (add'l)	01/25/23	J		
65.					Sold (part)	02/07/23	J	A	
66.					Buy (add'l)	02/21/23	J		
67.					Sold (part)	09/13/23	J	A	
68.					Sold (part)	09/15/23	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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69. SPY ETF	A	Dividend	K	T	Sold (part)	02/07/23	J	A	
70.					Buy (add'l)	02/21/23	J		
71. TROIX Mutual Fund	A	Dividend	J	T	Buy	01/25/23	J		
72.					Sold (part)	02/07/23	J	A	
73.					Buy (add'l)	02/21/23	J		
74.					Buy (add'l)	09/13/23	J		
75.					Buy (add'l)	09/15/23	J		
76. TSWIX Mutual Fund	A	Dividend	J	T	Buy	08/16/23	J		
77.					Buy (add'l)	08/16/23	J		
78.					Buy (add'l)	09/13/23	J		
79.					Buy (add'l)	09/15/23	J		
80. WMFFX Mutual Fund	A	Dividend	J	T	Buy (add'l)	01/25/23	J		
81.					Sold (part)	02/07/23	J	A	
82.					Buy (add'l)	02/21/23	J		
83.					Sold (part)	09/13/23	J	A	
84. WOBDX Mutual Fund	A	Dividend	J	T	Buy	09/15/23	J		
85. XLC ETF	A	Dividend	J	T	Buy (add'l)	01/11/23	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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86.					Sold (part)	02/07/23	J	A	
87.					Buy (add'l)	02/21/23	J		
88.					Sold (part)	06/01/23	J	A	
89.					Buy (add'l)	10/11/23	J		
90. XLK ETF	A	Dividend	K	T	Sold (part)	01/11/23	J	A	
91.					Sold (part)	02/07/23	J	A	
92.					Buy (add'l)	02/21/23	J		
93.					Sold (part)	06/01/23	J	A	
94.					Sold (part)	10/11/23	J	A	
95. XLP ETF	A	Dividend	J	T	Buy (add'l)	01/11/23	J		
96.					Sold (part)	02/07/23	J	A	
97.					Buy (add'l)	02/21/23	J		
98.					Buy (add'l)	06/01/23	J		
99.					Buy (add'l)	10/11/23	J		
100. XLU ETF	A	Dividend	J	T	Sold (part)	01/11/23	J	A	
101.					Sold (part)	02/07/23	J	A	
102.					Buy (add'l)	02/21/23	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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103.					Buy (add'l)	06/01/23	J		
104.					Sold (part)	10/11/23	J	A	
105. XLV ETF	A	Dividend	K	T	Sold (part)	01/11/23	J	A	
106.					Sold (part)	02/07/23	J	A	
107.					Buy (add'l)	02/21/23	J		
108.					Buy (add'l)	06/01/23	J		
109.					Buy (add'l)	10/11/23	J		
110. XLY ETF	A	Dividend	J	T	Buy (add'l)	01/11/23	J		
111.					Sold (part)	02/07/23	J	A	
112.					Buy (add'l)	02/21/23	J		
113.					Sold (part)	06/01/23	J	A	
114.					Sold (part)	10/11/23	J	A	
115. American Bond Fund of Amer A	A	Dividend	J	T					
116. American Cap Inc Builder A	A	Dividend	L	T					
117. American Capital World Bond A	A	Dividend	J	T					
118. American Fundamental INV A	A	Dividend	K	T					
119. American High-Income Trust A	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
U =Book Value V =Other W =Estimated

Name of Person Reporting	Date of Report
Gerrard, John M.	05/13/2024

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)	
120. American Inc. Fund of Amer A	A	Dividend	K	T					
121. Franklin Equity Income A	A	Dividend	J	T					
122. Franklin Growth Opport A	A	Dividend	J	T					
123. Franklin High Income A1	A	Dividend	J	T					
124. Franklin Income A1	A	Dividend	K	T					
125. Franklin Rising Dividends A	A	Dividend	J	T					
126. Franklin Total Return A	A	Dividend	J	T					
127. Franklin Utilities A1	A	Dividend	J	T					
128. American General Universal Life Insurance		None	J	T					
129. Nebraska Judges Retirement System (no control)	A	Interest	M	T					

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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

Name of Person Reporting	Date of Report
Gerrard, John M.	05/13/2024

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/ John M. Gerrard

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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