AO 10
Rev. 3/2023

# FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

*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 |
|---|---|---|
| Gorton, Nathaniel M. | District Court - Massachusetts | 04/17/2024 |
| **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. Distirct Judge - Active | ☐ Nomination Date<br>☐ Initial ☑ Annual ☐ Final<br>**5b.** ☑ Amended Report | 01/01/2022<br>**to**<br>12/31/2022 |
| **7. Chambers or Office Address** | | |
| United States District Court<br>Moakley Courthouse<br>1 Courthouse Way, Suite 3110<br>Boston, MA 02210 | | |

***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. | Stockholder, Clerk/Secretary and Director | Slade Gorton Seafood Holdings, Inc., Boston MA (closely held [redacted] seafood business) a MA corporation |
| 2. | Power of Attorney/Trustee (See NOTE in Part VIII) | Fidelity money market accounts (for all stckhds of Slade Gorton Seafood Holdings, Inc.) all of whom are [redacted] of the reporting party) |
| 3. | Trustee (See NOTE in Part VIII) | Irrevocable Trust (created in connection with the estate plan of reporting party's [redacted]) |
| 4. | Trustee (See NOTE in Part VIII) | 1989 Irrevocable Trust and Irrevocable Sub S Trust (both created in connection with the estate plan of reporting party's [redacted]) |
| 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. | 08/15/2022 | Slade Gorton Holdings, Inc. (closely held [redacted] seafood business) corporate clerk/secretary, director, custodian, trustee and accounting duties | $20,000.00 |
| 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. | New York Intellectural Property Lawyers Association | March 25, 2022 | New York City, NY | Attend annual NYIPLA dinner at Hilton Hotel | reimbursement for lodging and travel by train with [redacted] from Boston to New York |
| 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 |
|---|---|
| **Gorton, Nathaniel M.** | 04/17/2024 |

## 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. Slade Gorton Seafood Holdings, Inc. (a MA corporation)(common stock) | G | Dividend | O | Q | | | | | See Section VIII |
| 2. Fidelity Cash Reserves (individual) | A | Int./Div. | J | T | | | | | |
| 3. Charitable Remainder Trust | | | | | | | | | See Section VIII |
| 4. - Schwab Government Money market sweep | | None | K | T | | | | | |
| 5. - Air Products & Chemicals (Bond) | A | Interest | J | T | | | | | |
| 6. - Home Depot Inc. (Bond) | A | Interest | J | T | | | | | |
| 7. - Amgen (Bond) | A | Interest | K | T | | | | | |
| 8. - Wells Fargo (Bond) | A | Interest | J | T | Buy | 12/29/22 | J | | |
| 9. - Cogent Communications Holdings | A | Dividend | J | T | Buy (add'l) | 01/07/22 | J | | |
| 10. | | | | | Buy (add'l) | 03/14/22 | J | | |
| 11. - The Home Depot Inc | A | Dividend | J | T | Sold (part) | 01/07/22 | J | C | |
| 12. | | | | | Buy (add'l) | 03/14/22 | J | | |
| 13. - CME Group Inc Class A | A | Dividend | J | T | | | | | |
| 14. - Old Republic International Corp | A | Dividend | J | T | Buy | 01/07/22 | J | | |
| 15. - Gilead Sciences Inc | A | Dividend | K | T | Sold (part) | 01/07/22 | J | | |
| 16. | | | | | Buy (add'l) | 03/14/22 | J | | |
| 17. - A.O. Smith Corp | A | Dividend | J | T | Sold (part) | 01/07/22 | J | B | |

| | | | | | |
|---|---|---|---|---|---|
| 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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|---|---|---|---|---|---|---|---|---|---|
| 18. | | | | | Buy (add'l) | 03/14/22 | J | | |
| 19. - Fastenal Co | A | Dividend | J | T | Buy (add'l) | 03/14/22 | J | | |
| 20. - Lockhhed Martin Corp | A | Dividend | K | T | | | | | |
| 21. - Watsco Inc. | A | Dividend | J | T | Buy (add'l) | 03/14/22 | J | | |
| 22. - Air Products & Chemicals,Inc | A | Dividend | J | T | Buy (add'l) | 03/14/22 | J | | |
| 23. - American Tower Corp | A | Dividend | J | T | Buy (add'l) | 03/14/22 | J | | |
| 24. - Crown Castle International Corp | A | Dividend | J | T | Buy (add'l) | 03/14/22 | J | | |
| 25. - Equinix Inc. | A | Dividend | J | T | Sold (part) | 01/07/22 | J | C | |
| 26. - Lamar Advertising Co. | A | Dividend | J | T | Buy (add'l) | 01/07/22 | J | | |
| 27. | | | | | Buy (add'l) | 03/14/22 | J | | |
| 28. - Becle SAB de CV | A | Dividend | J | T | | | | | |
| 29. - Diageo Plc | A | Dividend | J | T | | | | | |
| 30. - Ferguson PLC | A | Dividend | J | T | Buy (add'l) | 03/14/22 | J | | |
| 31. - Constellation Software Inc. | A | Dividend | J | T | | | | | |
| 32. - Topicus com Inc | | None | J | T | | | | | |
| 33. - Novozymes A/S | A | Dividend | J | T | | | | | |
| 34. - Goldman Sachs Activebeta Intl Eq Etf | A | Dividend | J | T | Buy (add'l) | 03/14/22 | J | | |

| | | | | | |
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|---|---|---|---|---|---|---|---|---|---|
| 35. - Vanguard Intl Div Apprec ETF | A | Dividend | J | T | Buy (add'l) | 03/14/22 | J | | |
| 36. - Wisdomtree Emerging Markets Smcp Div Etf | A | Dividend | J | T | Buy (add'l) | 03/14/22 | J | | |
| 37. - Wisdomtree EmMkts ex-Stt-Ownd Entrprs ETF | A | Dividend | J | T | Buy (add'l) | 03/14/22 | J | | |
| 38. - Pimco Trends Managed Futures Strat Instl | A | Dividend | J | T | Buy | 07/27/22 | J | | |
| 39. - Boyd Group Services Inc. | | None | | | Buy | 03/14/22 | J | | |
| 40. | | | | | Sold | 06/09/22 | J | | |
| 41. - Farfetch LTD CL A | | None | | | Buy (add'l) | 03/14/22 | J | | |
| 42. | | | | | Sold | 05/27/22 | J | | |
| 43. - The Scotts Mircle Gro Co | | None | | | Buy (add'l) | 03/14/22 | J | | |
| 44. | | | | | Sold (part) | 01/07/22 | J | | |
| 45. | | | | | Sold | 06/15/22 | J | | |
| 46. - Clorox (Bond) | A | Interest | | | Sold | 02/10/22 | J | A | |
| 47. - Clorox (Bond) | A | Interest | | | Buy | 02/10/22 | J | | |
| 48. | | | | | Sold | 12/29/22 | J | | |
| 49. - Blackrock Inc | A | Interest | | | Sold | 11/18/22 | J | B | |
| 50. - Oracle Corp. (Bond) | A | Interest | | | Sold | 07/27/22 | J | | |
| 51. - Sea Ltd | | None | | | Sold | 05/17/22 | J | | |

| | | | | | |
|---|---|---|---|---|---|
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|---|---|---|---|---|---|---|---|---|---|
| 52. Boston Financial Management Inc. - IRA | | | | | | | | | See Section VIII |
| 53. - Schwab Government Money Inv | | None | K | T | | | | | |
| 54. - McDonalds Corp (Bond) | A | Interest | K | T | | | | | |
| 55. - Lowe's Cos Inc (Bond) | A | Interest | J | T | Redeemed (part) | 07/27/22 | J | | |
| 56. - Cisco Systems, Inc. (Bond) | A | Interest | K | T | | | | | |
| 57. - Novartis Capital Corp (Bond) | B | Interest | K | T | | | | | |
| 58. - Southwestern PUB (Bond) | A | Interest | J | T | Buy | 03/14/22 | K | | |
| 59. - Adobe Inc. (Bond) | B | Interest | K | T | | | | | |
| 60. - Automatic Data (Bond) | B | Interest | K | T | | | | | |
| 61. - Home Depot Inc (Bond) | A | Interest | K | T | | | | | |
| 62. - Visa Inc. (Bond) | A | Interest | K | T | | | | | |
| 63. - Lockheed Martin Corp (Bond) | A | Interest | J | T | Redeemed (part) | 05/11/22 | K | | |
| 64. - Apple Inc (Bond) | A | Interest | | | Buy | 12/21/22 | K | | |
| 65. | | | | | Redeemed | 12/22/22 | K | | |
| 66. - Pepsi Co (Bond) | A | Interest | K | T | | | | | |
| 67. - Honeywell (Bond) | A | Interest | K | T | | | | | |
| 68. - Csx Corp (Bond) | A | Interest | K | T | Buy | 10/18/22 | K | | |

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|---|---|---|---|---|---|---|---|---|---|
| 69. - Texas Instrument (Bond) | A | Interest | K | T | | | | | |
| 70. - John Deere Cap (Bond) | A | Interest | K | T | | | | | |
| 71. - NextEra Energy (Bond) | A | Interest | K | T | Buy | 05/31/22 | K | | |
| 72. - Cogent Communications | B | Dividend | K | T | | | | | |
| 73. - Nexstar Media Group Inc. | A | Dividend | K | T | Buy | 03/08/22 | K | | |
| 74. - O Reilly Automotive Inc. | | None | J | T | Buy | 07/19/22 | J | | |
| 75. - Church & Dwight Co. Inc. | A | Dividend | J | T | Buy | 07/13/22 | J | | |
| 76. - Costco Wholesale corp | A | Dividend | J | T | Sold (part) | 07/27/22 | K | D | |
| 77. - Brown & Brown Inc. | A | Dividend | K | T | | | | | |
| 78. - CME Group Inc. | A | Dividend | K | T | | | | | |
| 79. - First Republic | A | Dividend | K | T | | | | | |
| 80. - Moody's Corporation | A | Dividend | K | T | | | | | |
| 81. - Visa Inc. Class A | A | Dividend | K | T | | | | | |
| 82. - Avantor Inc. | | None | J | T | Buy | 06/09/22 | J | | |
| 83. -Steris Plc | A | Dividend | K | T | | | | | |
| 84. - Waters Corp | | None | J | T | | | | | |
| 85. - A.O. Smith Corp | A | Dividend | K | T | | | | | |

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less B =$1,001 - $2,500 C =$2,501 - $5,000 D =$5,001 - $15,000 E =$15,001 - $50,000
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|---|---|---|---|---|---|---|---|---|---|
| 86. - Broadbridge Financial Solutions Inc. | B | Dividend | K | T | | | | | |
| 87. - BMX Technologies Inc | A | Dividend | J | T | Buy | 07/13/22 | J | | |
| 88. - CACI International Inc. - A | | None | J | T | Buy | 12/16/22 | J | | |
| 89. - Clarivate Analytics Plc Ordinary Shares | | None | J | T | Buy (add'l) | 01/21/22 | J | | |
| 90. - Copart Inc. | | None | K | T | Sold (part) | 01/21/22 | J | E | |
| 91. - | | | | | Sold (part) | 01/27/22 | J | D | |
| 92. - Core & Maine Inc. - Class A | | None | J | T | Buy | 02/16/22 | J | | |
| 93. - Heico Corp | A | Dividend | K | T | | | | | |
| 94. - IDEX Corp | A | Dividend | J | T | | | | | |
| 95. - Lockheed Martin Corp | A | Dividend | K | T | | | | | |
| 96. - Nordson Corp | A | Dividend | K | T | | | | | |
| 97. - SiteOne Landscaping Supply Inc | | None | J | T | | | | | |
| 98. - Watsco Inc. | C | Dividend | L | T | | | | | |
| 99. - Amphenol Corp | A | Dividend | K | T | | | | | |
| 100. - Fair Isaac Corp | | None | K | T | | | | | |
| 101. - Roper Technologies Inc. | A | Dividend | J | T | Buy | 06/15/22 | J | | |
| 102. - Verisign Inc. | | None | K | T | | | | | |

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
B =$1,001 - $2,500
C =$2,501 - $5,000
D =$5,001 - $15,000
E =$15,001 - $50,000
F =$50,001 - $100,000
G =$100,001 - $1,000,000
H1 =$1,000,001 - $5,000,000
H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
P1 =$1,000,001 - $5,000,000
P2 =$5,000,001 - $25,000,000
P3 =$25,000,001 - $50,000,000
P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
S =Assessment
T =Cash Market
U =Book Value
V =Other
W =Estimated

| Name of Person Reporting | Date of Report |
|---|---|
| **Gorton, Nathaniel M.** | 04/17/2024 |

## 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. - Air Products & Chemicals, Inc. | B | Dividend | L | T | Sold (part) | 01/05/22 | K | D | |
| 104. - Sherwin-Williams Co. | A | Dividend | K | T | | | | | |
| 105. - American Tower Corp | A | Dividend | J | T | | | | | |
| 106. - Crown Castle International Corp | B | Dividend | K | T | | | | | |
| 107. - Equinix Inc. | A | Dividend | K | T | Sold (part) | 01/05/22 | K | D | |
| 108. - Ishares Core S&P Small-Cap | B | Dividend | L | T | | | | | |
| 109. - Becle SAB de CV | A | Dividend | J | T | | | | | |
| 110. - Diago Plc | B | Dividend | L | T | | | | | |
| 111. - Ferguson PLC | A | Dividend | K | T | | | | | |
| 112. - Constellation Software Inc. | A | Dividend | L | T | | | | | |
| 113. - Topicus com Inc. | | None | K | T | | | | | |
| 114. - Novozymes A/S | A | Dividend | J | T | | | | | |
| 115. - Firstservice Corp | A | Dividend | J | T | | | | | |
| 116. - Wisdomtree Emerging Markets Smcp Div Etf | B | Dividend | K | T | | | | | |
| 117. - Pimco Trends Managed Futures | A | Dividend | K | T | Buy | 07/27/22 | L | | |
| 118. - United Parcel Service (Bond) | A | Dividend | | | Redeemed | 10/01/22 | K | | |
| 119. - Eli Lilly & Co. (Bond) | A | Dividend | | | Redeemed | 05/15/22 | K | | |

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 |
|---|---|
| **Gorton, Nathaniel M.** | 04/17/2024 |

## 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. - IAC/InterActive Corp | A | Dividend | | | Sold | 07/19/22 | J | | |
| 121. - Fastenal Co | A | Dividend | | | Sold | 02/04/22 | K | D | |
| 122. - Sea ltd | A | Dividend | | | Sold | 05/17/22 | J | | |
| 123. - Farfetch LTD CL A | A | Dividend | | | Sold | 05/27/22 | J | | |
| 124. - Boyd Group Services Inc | A | Dividend | | | Sold | 06/09/22 | J | | |
| 125. - The Scotts Mircle Cro Co | A | Dividend | | | Sold | 06/15/22 | J | | |
| 126. - Guidewire Software Inc | A | Dividend | | | Sold | 06/15/22 | J | | |
| 127. - APi Group Corp | A | Dividend | | | Sold | 07/13/22 | J | | |
| 128. Boston Financial Management, Inc. Revocation Trust | | | | | | | | | See Section VIII |
| 129. - Schwab Government Money Market Sweep | | None | J | T | | | | | |
| 130. - Apple Inc. (Bond) | A | Interest | K | T | | | | | |
| 131. - Visa Inc. (Bond) | A | Interest | K | T | | | | | |
| 132. - Entergy (Bond) | | None | K | T | | | | | |
| 133. - Amazon.com (Bond) | A | Interest | | | Redeemed | 11/17/22 | K | | |
| 134. - Amazon.com (Bond) | | None | K | T | Buy | 11/17/22 | K | | |
| 135. - Massachusetts St Dev Fin Agy (Bond) | A | Interest | K | T | Buy | 02/15/22 | K | | |
| 136. - Duxbury Mass (Bond) | A | Interest | J | T | Buy | 03/31/22 | 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
P3 =$25,000,001 - $50,000,000
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3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
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V =Other
W =Estimated

## 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. - Cogent Communications Holdings, Inc. | A | Dividend | J | T | Sold (part) | 02/15/22 | J | B | |
| 138. - Nexstar Media Group Inc. | A | Dividend | J | T | Buy | 03/08/22 | J | | |
| 139. - Amazon.Com Inc | | None | K | T | | | | | |
| 140. - O Reilly Automotive Inc | | None | J | T | Buy | 07/19/22 | J | | |
| 141. - Costco Wholesale Corp | A | Dividend | J | T | Sold (part) | 04/26/22 | J | C | |
| 142. - Brown & Brown Inc | A | Dividend | J | T | | | | | |
| 143. - CME Group Inc - Class A | A | Dividend | J | T | Sold (part) | 02/15/22 | J | C | |
| 144. - First Republic Bank | A | Dividend | J | T | | | | | |
| 145. - Moody's Corporation | A | Dividend | J | T | | | | | |
| 146. - Visa Inc Class A | A | Dividend | J | T | | | | | |
| 147. - Becton Dickinson And Co | A | Dividend | J | T | | | | | |
| 148. - Steris Plc | A | Dividend | J | T | | | | | |
| 149. - Waters Corp | | None | J | T | | | | | |
| 150. - A.O. Smith Corp | A | Dividend | J | T | | | | | |
| 151. - Broadridge Financial Solutions Inc. | A | Dividend | J | T | Sold (part) | 02/15/22 | J | B | |
| 152. - BWX Technologies Inc. | A | Dividend | J | T | Buy | 07/13/22 | J | | |
| 153. - CACI International Inc. - A | | None | J | T | Buy | 12/14/22 | 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; 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 |
|---|---|
| **Gorton, Nathaniel M.** | 04/17/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 154. - Copart Inc. | | None | J | T | Sold (part) | 01/21/22 | J | D | |
| 155. - | | | | | Sold (part) | 01/27/22 | J | C | |
| 156. - Core & Main, Inc.- Class A | | None | J | T | Buy | 02/16/22 | J | | |
| 157. - Heico Corp | A | Dividend | J | T | Sold (part) | 02/15/22 | J | C | |
| 158. - IDEX Corp | A | Dividend | J | T | | | | | |
| 159. - Lockheed Martin Corp | A | Dividend | J | T | | | | | |
| 160. - Nordson Corp | A | Dividend | J | T | | | | | |
| 161. - Ritchie Bros Auctioneers | A | Dividend | J | T | Buy | 02/03/22 | J | | |
| 162. - SiteOne Landscaping Supply Inc. | | None | J | T | | | | | |
| 163. - Watsco Inc | A | Dividend | K | T | Sold (part) | 02/15/22 | J | B | |
| 164. - Amphenol Corp | A | Dividend | J | T | | | | | |
| 165. - Apple Inc. | A | Dividend | J | T | Sold (part) | 03/08/22 | J | D | |
| 166. - CDW Corp | A | Dividend | J | T | Buy | 02/03/22 | J | | |
| 167. - Fair Isaac Corp | | None | K | T | Sold (part) | 02/16/22 | J | A | |
| 168. - Roper Technologies | A | Dividend | J | T | Buy | 06/15/22 | J | | |
| 169. - Verisign Inc. | | None | J | T | Sold (part) | 02/15/22 | J | B | |
| 170. - Air Products & Chemicals Inc. | 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 |
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| **Gorton, Nathaniel M.** | 04/17/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 171. - Sherwin-Williams Co | A | Dividend | J | T | | | | | |
| 172. - American Tower Corp | A | Dividend | J | T | Buy (add'l) | 10/27/22 | J | | |
| 173. - Crown Castle International Corp | A | Dividend | J | T | Sold (part) | 10/27/22 | J | | |
| 174. - Equinix Inc. | A | Dividend | J | T | | | | | |
| 175. - Ferguson PLC | A | Dividend | J | T | Buy | 04/26/22 | J | | |
| 176. - Constellation Software Inc. | A | Dividend | K | T | | | | | |
| 177. - Topicus com Inc | | None | J | T | Buy (add'l) | 01/27/22 | J | | |
| 178. - Cliffwater Corporate Lending Fund | B | Dividend | J | T | Buy | 09/14/22 | J | | |
| 179. - Farfetch LTD CL A | A | Dividend | | | Buy | 01/10/22 | J | | |
| 180. | | | | | Buy (add'l) | 01/27/22 | J | | |
| 181. | | | | | Sold | 05/27/22 | J | | |
| 182. - IAC/InterActiveCorp | A | Dividend | | | Buy | 01/18/22 | J | | |
| 183. | | | | | Sold | 07/19/22 | J | | |
| 184. - Clarivate Analytics Plc Ordinary Shares | A | Dividend | | | Buy | 01/21/22 | J | | |
| 185. | | | | | Sold | 09/27/22 | J | | |
| 186. - Avantor Inc | A | Dividend | J | T | Buy | 06/09/22 | J | | |
| 187. - | | | | | Sold | 09/27/22 | 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; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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| Name of Person Reporting | Date of Report |
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| **Gorton, Nathaniel M.** | 04/17/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 188. - Fastenal Co | A | Dividend | | | Sold | 02/03/22 | J | B | |
| 189. - Boyd Group Services, Inc. | A | Dividend | | | Sold | 06/09/22 | J | | |
| 190. - The Scotts Miracle Gro Co | A | Dividend | | | Sold | 06/15/22 | J | A | |
| 191. - Guidewire Software Inc. | A | Dividend | | | Sold | 06/15/22 | J | | |
| 192. - APi Group Corp | A | Dividend | | | Sold | 07/13/22 | J | | |
| 193. - Blackrock | A | Dividend | | | Sold | 11/18/22 | J | | |
| 194. Boston Financial Management Inc. Revocable Trust | | | | | | | | | See Section VIII |
| 195. - Schwab Government Money Inv | | None | J | T | | | | | |
| 196. - Goldman Sachs Group Inc. (Bond) | A | Interest | J | T | Buy | 07/27/22 | J | | |
| 197. - Illinois Tool Works Inc. (Bond) | A | Interest | J | T | | | | | |
| 198. - JP Morgan (Bond) | A | Interest | J | T | Buy | 10/24/22 | J | | |
| 199. - Lockheed Martin Corp (Bond) | A | Interest | J | T | Redeemed (part) | 05/03/22 | J | | |
| 200. | | | | | Redeemed (part) | 05/11/22 | J | | |
| 201. - RBC Mtn Green (Bond) | A | Interest | J | T | Buy | 08/15/22 | J | | |
| 202. - Csx Corp (Bond) | A | Interest | J | T | Buy | 10/18/22 | J | | |
| 203. - Church & Dwight (Bond) | A | Interest | J | T | Buy | 07/20/22 | J | | |
| 204. - Commonwealth of MA 5 (Bond) | A | Interest | J | T | Buy | 04/20/22 | 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; 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 |
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| **Gorton, Nathaniel M.** | 04/17/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 205. - Easthampton Mass (Bond) | A | Interest | J | T | Buy | 04/13/22 | J | | |
| 206. - Boston Mass Wtr & Swr Commn 4.0 (Bond) | A | Interest | J | T | Buy | 04/26/22 | J | | |
| 207. - Duxbury Mass (Bond) | A | Interest | J | T | Buy | 03/31/22 | J | | |
| 208. - Nexstar Media Group | A | Dividend | J | T | Buy | 03/08/22 | J | | |
| 209. - Amazon.Com Inc | | None | J | T | | | | | |
| 210. - O Reilly Automotive Inc | | None | J | T | Buy | 07/19/22 | J | | |
| 211. - Church & Dwight Co Inc | A | Dividend | J | T | Buy | 07/13/22 | J | | |
| 212. - Costco Wholesale Corp | A | Dividend | J | T | Sold (part) | 04/26/22 | J | C | |
| 213. - Brown & Brown Inc. | A | Dividend | J | T | | | | | |
| 214. - CME Group Inc. - Class A | A | Dividend | J | T | | | | | |
| 215. - First Republic Bank | A | Dividend | J | T | | | | | |
| 216. - Moody's Corporation | A | Dividend | J | T | | | | | |
| 217. - Visa Inc Class A | A | Dividend | J | T | | | | | |
| 218. - Avantor Inc. | | None | J | T | Buy | 06/09/22 | J | | |
| 219. - | | | | | Sold (part) | 09/27/22 | J | | |
| 220. - | | | | | Buy (add'l) | 11/08/22 | J | | |
| 221. - Steris Plc | 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 |
|---|---|
| **Gorton, Nathaniel M.** | 04/17/2024 |

## 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.)*

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|---|---|---|---|---|---|---|---|---|---|
| 222. - A.O. Smith Corp | A | Dividend | J | T | Buy (add'l) | 02/03/22 | J | | |
| 223. - Broadbridge Financial Solutions, Inc. | A | Dividend | J | T | | | | | |
| 224. - BMX Technologies Inc. | A | Dividend | J | T | Buy | 07/13/22 | J | | |
| 225. - Clarivate Analytics Plc Ordinary Shares | | None | J | T | Buy | 01/21/22 | J | | |
| 226. | | | | | Sold (part) | 09/27/22 | J | | |
| 227. | | | | | Buy (add'l) | 11/16/22 | J | | |
| 228. - Copart Inc | | None | J | T | Sold (part) | 01/21/22 | J | C | |
| 229. | | | | | Sold (part) | 01/27/22 | J | B | |
| 230. - Core & Main Inc - Class A | | None | J | T | Buy | 02/16/22 | J | | |
| 231. - Heico Corp | A | Dividend | J | T | | | | | |
| 232. - IDEX Corp | A | Dividend | J | T | | | | | |
| 233. - Lockheed Martin Corp | A | Dividend | J | T | | | | | |
| 234. - Nordson Corp | A | Dividend | J | T | | | | | |
| 235. - Ritchie Bros Auctioneers | A | Dividend | J | T | Buy (add'l) | 02/03/22 | J | | |
| 236. - SiteOne Landscaping Supply Inc | | None | J | T | | | | | |
| 237. - Watsco Inc | A | Dividend | K | T | | | | | |
| 238. - Amphenol Corp | A | Dividend | J | T | | | | | |

1. Income Gain Codes: (See Columns B1 and D4)
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C =$2,501 - $5,000
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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
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|---|---|---|---|---|---|---|---|---|---|
| 239. - Apple Inc. | A | Dividend | J | T | Sold (part) | 03/08/22 | J | C | |
| 240. - CDW Corp | A | Dividend | J | T | Buy | 02/03/22 | J | | |
| 241. - Roper Technologies Inc. | A | Dividend | J | T | Buy | 06/15/22 | J | | |
| 242. - Verisign Inc | | None | J | T | | | | | |
| 243. - Air Products & Chemicals Inc. | A | Dividend | J | T | | | | | |
| 244. - Sherwin-Williams Co | A | Dividend | J | T | | | | | |
| 245. - American Tower Corp | A | Dividend | J | T | | | | | |
| 246. - Equinix Inc | A | Dividend | J | T | | | | | |
| 247. - Ishares Core S&P Mid-Cap | A | Dividend | J | T | | | | | |
| 248. - Ishares Core S&P Small-Cap | A | Dividend | J | T | | | | | |
| 249. - Diageo Plc | A | Dividend | J | T | | | | | |
| 250. - Ferguson PLC | A | Dividend | J | T | Buy | 04/26/22 | J | | |
| 251. - Constellation Software Inc | A | Dividend | K | T | | | | | |
| 252. - Topicus com Inc | | None | J | T | Buy (add'l) | 01/27/22 | J | | |
| 253. - Farfetch LTD CL A | A | Dividend | | | Buy | 01/10/22 | J | | |
| 254. | | | | | Buy (add'l) | 01/27/22 | J | | |
| 255. | | | | | Sold | 05/27/22 | J | | |

1. Income Gain Codes: (See Columns B1 and D4)
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| **Gorton, Nathaniel M.** | 04/17/2024 |

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|---|---|---|---|---|---|---|---|---|---|
| 256. - Fastenal Co | C | Dividend | | | Sold | 02/03/22 | J | C | |
| 257. - Alphabet (Bond) | | None | | | Redeemed | 03/31/22 | K | | |
| 258. - AT&T Inc. (Bond) | A | Interest | | | Redeemed | 05/11/22 | K | | |
| 259. - Boyd Group Services Inc. | A | Dividend | | | Sold | 06/09/22 | J | | |
| 260. - The Scotts Miracle Gro Co | A | Dividend | | | Sold | 06/15/22 | J | A | |
| 261. - Guidewire Softwire Inc | A | Dividend | | | Sold | 06/15/22 | J | | |
| 262. - APi Group Corp | A | Dividend | | | Sold | 07/13/22 | J | | |
| 263. - IAC/InterActiveCorp. | A | Dividend | | | Buy (add'l) | 01/18/22 | J | | |
| 264. | | | | | Sold | 07/19/22 | J | | |
| 265. - Crown Castle International Corp | A | Dividend | | | Sold | 10/27/22 | J | | |

| | | | | | |
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| **Gorton, Nathaniel M.** | 04/17/2024 |

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

Part I, Lines 2--4 Note: None of the beneficiaries of the trusts and accounts listed in Part 1 of which the reporting party is a trustee is a dependent of the reporting party and neither the reporting party nor his spouse has any beneficial interest in or control over the disposition of assets of such trusts and accounts.

Part VII, Line 1 - Income of the reporting party reported in Section VII is attributable to his pro rata share of the income of Slade Gorton Seafood Holdings, Inc. which is taxes as an S corporation whereby all corporate income is deemed passed through and taxable to the individual stockholders where or not such income is, in fact, distributed. The value of the stock holdings is appraised from time to time by a certified financial analyist, last done in 2019.

Part VII, Line 3 - In 1997 the reporting party and [redacted] funded a charitble remainder trust of which they are the income beneficiaries for life but in which they retain no right to principal.

Part VII, Lines 3, 52, 128 and 194 - The assets listed on the dashed (" - ") lines that follow these lines are managed by Boston Financial Management, Inc., Boston MA and consist of stocks and bonds in publicly held companies and equity holdings based on certain indicies.

Part VII, Line 52 - The reporting party is now required to withdraw a certain minimum amount from his IRA account each year.

| Name of Person Reporting | Date of Report |
|---|---|
| **Gorton, Nathaniel M.** | 04/17/2024 |

## 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/ Nathaniel M. Gorton**

**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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Washington, D.C. 20544