Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Heaton, Joe L.
U.S. District Court - Oklahoma Western
Senior District Judge

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. Â§ 13141 et. seq., 5 U.S.C. Â§ 7353, and Judicial Conference regulations.

/s/ Heaton, Joe L. [electronically signed on Jul 23, 2026 4:11pm by Heaton, Joe L. in JEFS]
/s/ Heaton, Joe L. [electronically signed on Jun 10, 2026 5:48pm by Heaton, Joe L. in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Trust #1	Trust	Co-Trustee
2.	Trust #2	Trust	Co-Trustee
3.	Federal Judges Assoc.	Non-Profit	Director
4.	DABH LLC	Limited Liability Company	Co-Manager

II. Agreements

	EMPLOYER OR PARTY NAME	TERMS	AGREEMENT START MONTH	AGREEMENT START YEAR
1.	Okla. Public Employees Ret. System	Vest retirement benefit	January	2012

III A. Filer Non-Investment Income

	SOURCE	INCOME TYPE	INCOME AMOUNT	HONORARIUM DATE
1.	Okla. Pub. Empl. Retirement System- vested pension	Fixed Retirement / Pension Benefits	$869.00	

III B. Spouse Non-Investment Income

I do not have any Spouse Non-Investment Income to report
No entries in this section

IV. Reimbursements

	SOURCE OF REIMBURSEMENT	FROM DATE	TO DATE	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	Federal Judges Assoc.	Apr 2, 2025	Apr 4, 2025	Philadelphia, PA	Board Meeting	hotel, meals & travel

V. Gifts

I do not have any Gifts to report
No entries in this section

VI. Liabilities

I do not have any Liabilities to report
No entries in this section

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**323 East Mosier Ltd Partnership ltd. part. interest**	$15,001 - $50,000	Dividend	$250,001 - $500,000	Book Value
2.	**Alligence Credit Union account**	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
3.	**Bank of Oklahoma accounts**	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
4.	**DABH LLC**		None	$15,000 or less	Book Value
5.	**DDB Limited Partnership, ltd. part. interest**	$15,001 - $50,000	Rent	$500,001 - $1,000,000	Book Value
6.	**Duke Energy common stock**	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
7.	**Enbridge Inc. common stock**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
8.	**EUPAC (f/n/a Europacific Growth Fund)**	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
9.	**Executive Producers LP, ltd. part. int.**	$15,001 - $50,000	Rent	$500,001 - $1,000,000	Book Value
10.	**Growth Fund of America**	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
11.	**Hollywood Shopping Center LLC, Norman, OK**	$2,501 - $5,000	Rent	$15,000 or less	Book Value
12.	**(H) Individual Retirement Account #1 (H)**				
12-A.	- Amcap Fund	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
12-B.	Bond Fund of America A	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market
12-C.	EUPAC (f/n/a Europacific Growth Fund)	$1,001 - $2,500	Gain	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Jul 10, 2025	$15,001 - $50,000

12-D.	- Growth Fund of America	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
12-E.	- Investment Company of America	$50,001 - $100,000	Dividend	$500,001 - $1,000,000	Cash/Market
12-F.	- Morgan Stanley cash account	$1,000 or less	Interest	$15,000 or less	Cash/Market
12-G.	Short Term Bond Fund A	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
13.	**(H) Individual Retirement Account #2**				
13-A.	- Amcap Fund	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
13-B.	Bond Fund of America A	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
13-C.	EUPAC (f/n/a Europacific Growth Fund)	$5,001 - $15,000	Gain		

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold Nov 26, 2025 $15,000 or less				
13-D.	- Growth Fund of America	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
13-E.	- Investment Company of America	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market
13-F.	-Morgan Stanley cash account	$1,000 or less	Interest	$15,000 or less	Cash/Market
13-G.	Short Term Bond Fund A	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
13-H.	U.S. Gov't Money Fund	$1,000 or less	Gain	$15,000 or less	Cash/Market
	Transactions **Transaction Type** **Transaction Date** **Transaction Value**				
	(1). Sold (part) Dec 10, 2025 $15,001 - $50,000				
	(2). Sold (part) Dec 11, 2025 $15,001 - $50,000				
14.	**Int.Growth & Income Fund**	$1,000 or less	Dividend		
	Additional Explanation: Complete disposition of the assets on lines 14 & 22 reflects transfers to non-dependent relatives.				
15.	**Investment Company of America**	$15,001 - $50,000	Dividend	$500,001 - $1,000,000	Cash/Market
16.	**Masterpiece Properties LP - ltd. part. interest**	$15,001 - $50,000	Rent	$100,001 - $250,000	Book Value
17.	**Meadowood II LP ltd. part. int. real est. dev. Cleveland, OK**	$1,001 - $2,500	Rent	$100,001 - $250,000	Book Value
18.	**Mineral interest - Harper Co., Okla.**	$1,000 or less	Royalty	$15,000 or less	Other
19.	**Morgan Stanley Bank Deposit Program**	$1,000 or less	Interest	$50,001 - $100,000	Cash/Market
20.	**Norman Construction & Paving common stock**		None	$15,000 or less	Cash/Market
21.	**Oil & gas working interest**	$1,000 or less	Royalty	$15,000 or less	Estimated
22.	**Small Cap World Fund**	$1,000 or less	Dividend		
23.	**Tax Exempt Bond Fund A**	$2,501 - $5,000	Interest	$100,001 - $250,000	Cash/Market
24.	**U.S. Gov't I-bonds**		None	$15,001 - $50,000	Cash/Market
25.	**Voya Ins. Co.**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
	Additional Explanation: Whole life policy				
26.	**West Oaks Rentals, ltd. part. Norman, OK office bldg.**	$1,000 or less	Rent	$15,000 or less	Book Value
27.	**Xcel Energy common stock**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

VIII. Additional Information or Explanations

	ADDITIONAL INFORMATION OR EXPLANATION
1.	The oil and gas working interests identified in Line 21 of Part VII are located in Oklahoma County and McClain County, and valued based on monthly income x 36 months. The Harper County royalty interest (Line 18) is valued the same way.
2.	The limited partnerships identified in Lines 1, 5, 9, 16, and 17 have income in multiple categories; the predominant one is indications indicated.
3.	The properties generating rental income for the various entities are all located in Cleveland County, Oklahoma.
4.	The trusts referenced in Part I are revocable trusts of which filer is a co-trustee and co-beneficiary.
5.	All mutual funds referenced are part of the American Funds group of funds.

ADDITIONAL INFORMATION OR EXPLANATION

6. DABH LLC (positions & VII) is closely held. Sole asset is real estate in Cleveland Co., OK.

Produced by Administrative Office of the United States Courts