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
Huffaker, Jr., Robert A.	U.S. District Court, Middle District of Alabama	05/15/2023
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 (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
Frank M. Johnson U.S. Courthouse One Church Street Montgomery, AL 36104		

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.	Director/Board	Alabama Pattern Jury Charge Instructions Committee-Civil
2.	Co-Manager/Member	[redacted] (reportable asset is listed in Part VII)
3.	Manager/Member	[redacted] (reportable assets are listed in Part VII)
4.	Trustee	Trust #1 (reportable assets are listed in Part VII)
5.	Trustee	Trust #2 (reportable assets are listed in Part VII)

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.	2023	Self-employed (attorney)
2.	2023	Alabama State Bar (salary)
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.	Alabama State Bar	May 17-18, 2023	Gulf Shores, AL	Speaker	Lodging and transportation
2.	Alabama State Bar	July 12-16, 2023	Point Clear, AL	State Bar Conference	Lodging and food
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.	High Speed Alliance, LLC	Investment Seminar Accommodations, Ft. Worth, TX	$1,500.00
2.	High Speed Alliance, LLC	Carribean Cruise	$2,500.00
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
Huffaker, Jr., Robert A.	05/15/2023

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		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
1.	Individual Assets (H)									
2.	Renasant Bank (cash)	A	Interest	J	T					
3.	Servist1st Bank (cash)	A	Interest	L	T					
4.	Note (Estero Development Partners LP)	D	Interest	K	T					
5.	[redacted]		None	N	W					
6.	Rockstar Capital Development Fund II	C	Interest	K	T					
7.	Bryne Capital Life Settlement		None	K	T					
8.	United Dental Corp		None	K	T					
9.	U.S. Savings Bonds, Series I		None	J	T					
10.	Mineral Interest - see Part VIII		None	K	T	Buy (add'l)	08/09/23	K		
11.	HSV MarCAP II LLC		None	K	T					
12.	Convertible Promissory Note/ Rialto Trading Holding LLC		None	K	T	Open	11/27/23	K		
13.	Promissory Note/Homestar Finance LLC		None	K	T	Open	12/13/23	K		
14.	Account #1 (H)									
15.	CamaPlan FDIC Insured (cash)		None	K	T					
16.	Bryne Capital Life Settlement Wealth Fund 2021 L		None	K	T					
17.	EOKH Rhino Mineral Package (Eckard OK Holdings LLC)		None	K	T	Buy	08/11/23	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

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Huffaker, Jr., Robert A.	05/15/2023

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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		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
18.	High Speed Ventures Uniden, LLC (Forrest Bryant) (X)		None	K	T					
19.	Rockstar Capital Development Group, LP	E	Interest	M	T					
20.	United Dental Corp (Y)									
21.	Investment Property #1, Bella Vista, AR		None	J	W					
22.	Account #2 (H)									
23.	Schwab Treasury Oblig Money Inv (SNOXX) (cash eq.)	A	Dividend	J	T	Buy (add'l)	03/21/23	J		
24.	Schwab Short-Term, Bond Index Fund (SWSBX)	A	Dividend			Sold	03/21/23	J		
25.	Schwab US Aggregate Bond Index Fd (SWAGX)	A	Dividend	J	T					
26.	Schwab US Large Cap Growth Index Fd (SWLGX)	A	Dividend	J	T					
27.	Schwab US Mid Cap Index Fd (SWMCX)	A	Dividend	J	T					
28.	Schwab Fundamental Emer Mkt Large Co Index (SFENX)	A	Dividend	J	T					
29.	Schwab Fundamental Intl Small Co Index (SFILX)	A	Dividend	J	T					
30.	Schwab Fundamental US Large Co Index (SFLNX)	A	Dividend	J	T					
31.	Schwab Intl Index Fund (SWISX)	A	Dividend	J	T					
32.	Schwab S&P 500 Index Fd (SWPPX)	A	Dividend	J	T					
33.	Schwab Small Cap Index (SWSSX)	A	Dividend	J	T					
34.	Account #3 (H)									

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35. Charles Schwab Bank Sweep (cash)	A	Interest	J	T					
36. Schwab Treasury Oblig Money Inv (SNOXX) (cash eq.)	D	Dividend	M	T	Buy (add'l)	03/21/23	L		
37.					Buy (add'l)	06/28/23	J		
38.					Buy (add'l)	08/31/23	J		
39. Abbvie Inc (ABBV)	A	Dividend			Sold	01/13/23	J	C	
40. Apple Inc (AAPL)	A	Dividend	K	T	Buy (add'l)	01/13/23	J		
41. Arthur J Gallagher & C (AJG)		None			Sold	01/13/23	J	B	
42. Chevron Corp (CVX)		None			Sold	01/13/23	J	D	
43. Cincinnati Finl (CINF)	A	Dividend	J	T					
44. Colgate-Palmolive Co (CL)	A	Dividend	K	T	Buy (add'l)	01/13/23	J		
45. Consolidated Edison (ED)	A	Dividend	J	T	Sold (part)	01/13/23	J	A	
46. Emerson Electric Co (EMR)	A	Dividend	J	T	Sold (part)	01/13/23	J	A	
47. Exxon Mobil Corp (XOM)	A	Dividend	J	T					
48. General Mills Inc (GIS)	A	Dividend	J	T	Sold (part)	01/13/23	J	C	
49. IBM Corp (IBM)	A	Dividend	J	T	Sold (part)	01/13/23	J	A	
50. Intel Corp (INTC)	A	Dividend			Buy (add'l)	01/13/23	K		
51.					Sold	03/01/23	K		

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52. Johnson & Johnson (JNJ)	A	Dividend	J	T	Sold (part)	01/13/23	J	A	
53. JPMorgan Chase & Co (JPM)	B	Dividend	K	T					
54. Kimberly-Clark Corp (KMB)	A	Dividend	K	T					
55. Lockheed Martin Corp (LMT)	A	Dividend	J	T	Sold (part)	01/13/23	J	A	
56. McDonalds Corp (MCD)	A	Dividend	J	T	Sold (part)	01/13/23	J	A	
57. Microsoft (MSFT)	A	Dividend	K	T	Buy	01/13/23	J		
58. Nextera Energy Inc (NEE)	A	Dividend	J	T	Buy (add'l)	01/13/23	J		
59. Paychex Inc (PAYX)	A	Dividend	J	T	Buy	01/13/23	J		
60. Pepsico Inc (PEP)	A	Dividend	J	T	Sold (part)	01/13/23	J	A	
61. Pfizer Inc (PFE)	A	Dividend	J	T	Buy (add'l)	01/13/23	J		
62. Procter & Gamble (PG)	A	Dividend	J	T	Buy (add'l)	01/13/23	J		
63. Qualcomm Inc (QCOM)	A	Dividend	K	T	Buy	01/13/23	J		
64. RTX Corp (RTX)		None			Sold	01/13/23	J	B	
65. Southern Co (SO)	A	Dividend	J	T	Sold (part)	01/13/23	J		
66. Texas Instruments (TXN)	A	Dividend	K	T	Buy	03/01/23	K		
67. Truist Finl Corp (TFC)	A	Dividend	K	T	Buy (add'l)	01/13/23	J		
68. Unilever PLC (UL)	A	Dividend	K	T					

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69.	Verizon Communications (VZ)	B	Dividend	K	T	Buy (add'l)	01/13/23	J		
70.	Pimco GNMA And Government Secs Instl (PDMIX)	A	Dividend	M	T	Buy	11/17/23	M		
71.	Pimco Incm Inst Cl (PIMIX)	C	Dividend	L	T					
72.	Pimco Short Term Instl Cl (PTSHX)	D	Dividend	M	T					
73.	Schwab Short-Term Bond Index Fund (SWSBX)	A	Dividend			Sold	03/21/23	L		
74.	Vanguard GNMA Fund Admiral Share (VFIJX)	C	Dividend			Sold	11/17/23	M		
75.	Vanguard Total Bond Market Index Admiral (VBTLX)	A	Dividend	J	T					
76.	Account #4 (H)									
77.	Charles Schwab Bank (cash)	A	Interest	K	T					
78.	Schwab Treasury Oblig Money Inv (SNOXX) (cash eq.)	E	Dividend	O	T	Sold (part)	01/11/23	L		
79.						Buy (add'l)	03/21/23	M		
80.						Buy (add'l)	06/28/23	K		
81.						Buy (add'l)	07/20/23	K		
82.	GNMA II 5.5% Due 05/20/36 (36202EH44)	A	Interest	J	T					
83.	GNMA II 6.0% Due 03/20/39 (36202E3H0)	A	Interest	J	T					
84.	GNMA II 5.0% Due 09/20/40 (36202FKP0)	A	Interest	J	T					
85.	AT&T Inc (T)	C	Dividend			Sold	07/11/23	L		

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86. Abbott Laboratories (ABT)	B	Dividend	L	T					
87. Abbvie Inc (ABBV)	C	Dividend	L	T					
88. Accenture (ACN)	A	Dividend	L	T					
89. Advanced Micro Devices (AMD)		None	L	T	Buy	02/08/23	K		
90. Alphabet Inc Cl A (GOOGL)		None	L	T					
91. Amazon.Com Inc (AMZN)		None	L	T					
92. Apple Inc (AAPL)	A	Dividend	L	T					
93. Blackstone Group Inc (BX)	B	Dividend	L	T					
94. Bristol-Myers Squibb (BMY)	C	Dividend	L	T					
95. Carrier Global Corp (CARR)	A	Dividend	L	T	Buy	07/11/23	L		
96. Caterpillar Inc (CAT)	B	Dividend	L	T					
97. Chevron Corp (CVX)	C	Dividend	L	T					
98. Cisco Systems Inc (CSCO)	B	Dividend	L	T					
99. Colgate-Palmolive Co (CL)	B	Dividend	L	T					
100. Deere & Co (DE)	A	Dividend	L	T					
101. Dollar General Corp (DG)	A	Dividend	K	T					
102. Goldman Sachs Group (GS)	B	Dividend	L	T					

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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)	
103. Home Depot Inc (HD)	B	Dividend	L	T					
104. IBM Corp (IBM)	C	Dividend	L	T					
105. Intel Corp (INTC)	A	Dividend			Sold	02/08/23	K		
106. Johnson & Johnson (JNJ)	B	Dividend	L	T					
107. JP Morgan Chase & Co (JPM)	B	Dividend	L	T					
108. Lockheed Martin Corp (LMT)	B	Dividend	L	T					
109. Mastercard Inc Cl A (MA)	A	Dividend	L	T					
110. Mcdonalds Corp (MCD)	B	Dividend	L	T					
111. Microsoft Corp (MSFT)	A	Dividend	L	T					
112. Nextera Energy Inc (NEE)	B	Dividend	K	T					
113. Nvidia Corp (NVDA)	A	Dividend	M	T					
114. Oracle Corp (ORCL)	B	Dividend	L	T					
115. Pepsico Inc (PEP)	B	Dividend	L	T					
116. Qualcomm Inc (QCOM)	B	Dividend	L	T					
117. RTX Corp (RTX)	B	Dividend	L	T					
118. Sherwin Williams Co (SHW)	A	Dividend	L	T					
119. Southern Co (SO)	C	Dividend	L	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		

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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. Stryker Corp (SYK)	A	Dividend	L	T					
121. Target Corp (TGT)	B	Dividend	L	T					
122. The Coca-Cola Co (KO)	B	Dividend	L	T					
123. TJX Companies Inc (TJX)	B	Dividend	L	T					
124. Truist Finl Corp (TFC)	B	Dividend	K	T					
125. Visa Inc Cl A (V)	A	Dividend	L	T					
126. Walt Disney Co (DIS)		None	K	T					
127. Pimco GNMA And Government Secs Instl (PDMIX)	B	Dividend	N	T	Buy	11/17/23	N		
128. Pimco Income Fund Inst Class (PIMIX)	D	Dividend	M	T					
129. Pimco Short-Term Fund Inst Class (PTSHX)	E	Dividend	N	T					
130. Schwab Short-Term Bond Index Fund (SWSBX)	B	Dividend			Sold	03/21/23	M		
131. Vanguard GNMA Fund Admiral Share (VFIJX)	D	Dividend			Sold	11/17/23	N		
132. Account #5 (H)									
133. Schwab Treasury Oblig Money Inv (SNOXX) (cash eq.)	A	Dividend	K	T	Buy (add'l)	03/21/23	J		
134. Schwab Short-Term Bond Index Fund (SWSBX)	A	Dividend			Sold	03/21/23	J		
135. Schwab US Aggregate Bond Index Fd (SWAGX)	A	Dividend	J	T					
136. Schwab US Large Cap Growth Index Fd (SWLGX)	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
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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)	
137. Schwab US Mid Cap Index Fd (SWMCX)	A	Dividend	J	T					
138. Schwab Fundamental Emer Mkt Large Co Index (SFENX)	A	Dividend	J	T					
139. Schwab Fundamental Intl Small Co Index (SFILX)	A	Dividend	J	T					
140. Schwab Fundamental US Large Co Index (SFLNX)	A	Dividend	J	T					
141. Schwab Intl Index Fund (SWISX)		None	J	T					
142. Schwab S&P 500 Index Fd (SWPPX)	A	Dividend	J	T					
143. Schwab Small Cap Index (SWSSX)		None	J	T					
144. Account #6 (H)									
145. Schwab Treasury Oblig Money Inv (SNOXX) (cash eq.) (X)	A	Dividend	J	T					
146. Schwab US Large Cap Growth Index Fd (SWLGX) (X)	A	Dividend	J	T					
147. Schwab Fundamental Emer Mkt Large Co Index (SFENX) (X)	A	Dividend	J	T					
148. Schwab Fundamental US Large Co Index (SFLNX) (X)	A	Dividend	J	T					
149. Schwab S&P 500 Index (SWPPX)	A	Dividend	J	T					
150. Schwab Small Cap Index (SWSSX) (X)	A	Dividend	J	T					
151. Account #7 (H)									
152. Schwab US Large-Cap Growth Indx (SWLGX) (X)	A	Dividend	J	T					
153. Schwab Fundamental US Large Company Indx (SFLNX) (X)	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
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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. Schwab S&P 500 Index (SWPPX) (X)	A	Dividend	J	T					
155. Account #8 (H)									
156. Charles Schwab Bank (cash)	A	Interest	K	T					
157. Schwab Treasury Oblig Money Inv (SNOXX) (cash eq.)	C	Dividend	L	T	Sold (part)	07/06/23	J		
158. Abbvie Inc (ABBV)	B	Dividend	K	T					
159. Apple Inc (AAPL)	A	Dividend	L	T					
160. Arthur J. Gallagher (AJG)	A	Dividend	M	T	Sold (part)	01/13/23	J	D	
161. Chevron Corp (CVX)	B	Dividend	L	T	Sold (part)	01/13/23	K	D	
162. Cincinnatti Financial (CINF)	B	Dividend	L	T					
163. Colgate-Palmolive (CL)	A	Dividend	L	T					
164. Consolidated Edison (ED)	B	Dividend	L	T					
165. Emerson Electric (EMR)	B	Dividend	K	T					
166. Exxon Mobil Corp (XOM)	B	Distribution	L	T	Sold (part)	01/13/23	K	D	
167. General Mills Inc (GIS)	B	Dividend	L	T	Sold (part)	01/13/23	J	C	
168. Home Depot Inc (HD)	B	Dividend	L	T					
169. IBM Corp (IBM)	C	Dividend	L	T					
170. Intel Corp (INTC)	A	Dividend			Buy (add'l)	01/13/23	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

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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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171.					Sold	03/01/23	K		
172. Johnson & Johnson (JNJ)	B	Dividend	K	T					
173. JP Morgan Chase & Co (JPM)	B	Dividend	L	T	Buy (add'l)	01/13/23	K		
174. Kimberly Clark (KMB)	B	Dividend	K	T					
175. Lockheed Martin Corp (LMT)	B	Dividend	L	T					
176. McDonalds Corp (MCD)	B	Dividend	L	T					
177. Microsoft Corp (MSFT)	A	Dividend	M	T					
178. Nextera Energy (NEE)	B	Dividend	K	T					
179. Paychex Inc (PAYX)	B	Dividend	L	T					
180. Pepsico Inc (PEP)	B	Dividend	L	T	Sold (part)	01/13/23	J	D	
181. Pfizer Inc (PFE)	B	Dividend			Sold	11/30/23	K		
182. Procter & Gamble (PG)	B	Dividend	L	T					
183. Qualcomm Inc (QCOM)	B	Dividend	K	T					
184. RTX Corp (RTX)	B	Dividend	K	T	Sold (part)	01/13/23	J	B	
185. Southern Co (SO)	B	Dividend	L	T					
186. Texas Instruments (TXN)	B	Dividend			Buy	03/01/23	K		
187.					Sold	11/30/23	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

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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. Truist Finl Corp (TFC)	B	Dividend			Sold	11/13/23	K		
189. Unilver PLC (UL)	B	Dividend	K	T					
190. Verizon Communication (VZ)	B	Dividend	K	T					
191. Vanguard Interm Term Tax Exempt Fund Admiral (VWIUX)	D	Dividend	M	T					
192. Vanguard Limited Term Tax Exempt Fund Admiral (VMLUX)	D	Dividend	M	T					
193. Vanguard Short-term Tax Exempt Fund Class Admiral (VWSUX)	D	Dividend	N	T					
194. Select Sector Health Care SPDR ETF (XLV)	A	Dividend	K	T	Buy	11/30/23	K		
195. Select Sector Financial Select SPDR ETF (XLF)	A	Dividend	K	T	Buy	11/13/23	K		
196. SPDR S&P Semiconductor ETF (XSD)	A	Dividend	K	T	Buy	11/30/23	K		
197. Account #9 (H)									
198. Charles Schwab Bank (cash)	A	Interest	J	T					
199. Schwab Treasury Oblig Money Inv (SNOXX) (cash eq.)	A	Dividend	K	T	Buy (add'l)	11/29/23	J		
200. Abbvie Inc (ABBV)	B	Dividend	K	T	Sold (part)	01/13/23	J	D	
201. Apple Inc (AAPL)	A	Dividend	K	T					
202. Arthur J. Gallagher (AJG)		None			Sold	01/13/23	J	B	
203. Chevron Corp (CVX)	A	Dividend	K	T	Sold (part)	01/13/23	J	C	
204. Cincinnatti Financial (CINF)	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
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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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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. Colgate-Palmolive (CL)	A	Dividend	K	T	Buy (add'l)	01/13/23	J		
206. Consolidated Edison (ED)	A	Dividend	J	T	Sold (part)	01/13/23	J	D	
207. Emerson Electric (EMR)	A	Dividend	K	T					
208. Exxon Mobil Corp (XOM)	B	Dividend	K	T					
209. General Mills Inc. (GIS)	A	Dividend	J	T	Sold (part)	01/13/23	J	B	
210. Home Depot Inc (HD)	A	Dividend	K	T	Sold (part)	01/13/23	J	D	
211. IBM Corp (IBM)	A	Dividend	J	T	Sold (part)	01/13/23	J	A	
212. Intel Corp (INTC)	A	Dividend			Sold	03/01/23	J	B	
213. Johnson & Johnson (JNJ)	A	Dividend	K	T					
214. JP Morgan Chase & Co (JPM)	A	Dividend	K	T					
215. Kimberly Clark (KMB)	A	Dividend	J	T	Buy (add'l)	01/13/23	J		
216. Lockheed Martin Corp (LMT)	A	Dividend	K	T	Sold (part)	01/13/23	J	C	
217. McDonalds Corp (MCD)	A	Dividend	K	T	Sold (part)	01/13/23	J	C	
218. Microsoft Corp (MSFT)	A	Dividend	J	T	Buy	01/13/23	J		
219. Nextera Energy (NEE)	A	Dividend	J	T					
220. Paychex Inc (PAYX)	A	Dividend	K	T	Sold (part)	01/13/23	J	D	
221. Pepsico Inc (PEP)	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; 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)	
222. Pfizer Inc (PFE)	A	Dividend			Buy (add'l)	01/13/23	J		
223.					Sold	11/30/23	J		
224. Qualcomm Inc (QCOM)	A	Dividend	K	T	Buy (add'l)	01/13/23	J		
225. RTX Corp (RTX)	A	Dividend	K	T					
226. Southern Co (SO)	A	Dividend	K	T					
227. Texas Instruments (TXN)	A	Dividend			Buy	03/01/23	J		
228.					Sold	11/30/23	J		
229. Truist Finl Corp (TFC)	B	Dividend			Buy (add'l)	01/13/23	K		
230.					Sold	11/13/23	K		
231. Unilever PLC (UL)	B	Dividend	K	T	Buy (add'l)	01/13/23	J		
232. Verizon Communication (VZ)	B	Dividend	K	T	Buy (add'l)	01/13/23	K		
233.					Sold	11/13/23	K		
234.					Buy	12/13/23	K		
235. Vanguard Interm Term Tax Exempt Fund Admiral (VWIUX)	B	Dividend	L	T					
236. Vanguard Limited Term Tax Exempt Fund Admiral (VMLUX)	B	Dividend	L	T					
237. Vanguard Ultra Short-term Tax Exempt Fund Class Admiral (VWSUX)	B	Dividend	L	T					
238. Pimco Enchanced Shrt Maturity Actv ETF (MINT)		None			Buy	11/13/23	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		
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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)	
239.					Sold	12/13/23	K	A	
240. Select Sector Health Care SPDR ETF (XLV)		None	J	T	Buy	11/30/23	J		
241. Select Sector Financial Select SPDR ETF (XLF)		None	K	T	Buy	11/13/23	K		
242. SPDR S&P Semiconductor ETF (XSD)		None	J	T	Buy	11/30/23	J		
243. Account #10 (H)									
244. Schwab Treasury Oblig Money Inv (SNOXX) (cash eq.)	A	Dividend			Buy	01/17/23	L		
245.					Sold	03/07/23	L		
246. Abbvie Inc (ABBV)	B	Dividend	K	T					
247. Apple Inc (AAPL)	A	Dividend	K	T	Buy (add'l)	12/04/23	K		
248. Arthur J. Gallagher (AJG)	A	Dividend	K	T	Sold (part)	01/13/23	J	C	
249.					Buy (add'l)	12/04/23	K		
250. Chevron Corp (CVX)	B	Dividend	K	T	Sold (part)	01/13/23	J	D	
251. Cincinnati Finl (CINF)	A	Dividend	K	T	Buy (add'l)	01/13/23	J		
252. Colgate-Palmolive Co (CL)	A	Dividend	K	T					
253. Consolidated Edison (ED)	B	Dividend	K	T					
254. Emerson Electric Co (EMR)	A	Dividend	K	T					
255. Exxon Mobil Corp (XOM)	B	Dividend	L	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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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. General Mills Inc (GIS)	A	Dividend	K	T					
257. Home Depot Inc (HD)	A	Dividend	K	T	Buy (add'l)	01/13/23	J		
258. IBM Corp (IBM)	B	Dividend	K	T					
259. Intel Corp (INTC)	A	Dividend			Sold	03/01/23	J		
260. JP Morgan Chase & Co (JPM)	A	Dividend	J	T	Buy	01/13/23	J		
261. Johnson & Johnson (JNJ)	A	Dividend	K	T					
262. Kimberly-Clark Corp (KMB)	A	Dividend	K	T					
263. Lockheed Martin Corp (LMT)	A	Dividend	K	T					
264. McDonalds Corp (MCD)	A	Dividend	K	T					
265. Microsoft Corp (MSFT)	A	Dividend	L	T					
266. Nextera Energy Inc (NEE)	A	Dividend	K	T					
267. Paychex Inc (PAYX)	B	Dividend	K	T					
268. Pepsico Inc (PEP)	A	Dividend	K	T					
269. Pfizer Inc (PFE)	A	Dividend	K	T					
270. Procter & Gamble (PG)	A	Dividend	K	T					
271. Qualcomm Inc (QCOM)	A	Dividend	K	T					
272. RTX Corp (RTX)	A	Dividend	K	T	Sold (part)	01/13/23	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. Southern Co (SO)	B	Dividend	K	T					
274. Texas Instruments (TXN)	A	Dividend	J	T	Buy	03/01/23	J		
275. Truist Finl Corp (TFC)	A	Dividend			Sold	11/13/23	J		
276. Unilever PLC (UL)	A	Dividend	K	T					
277. Verizon Communication (VZ)	A	Dividend	J	T	Sold	11/13/23	K		
278.					Buy	12/13/23	J		
279. Vanguard Interm Term Tax Exempt Fund Admiral (VWIUX)	B	Dividend	K	T	Sold (part)	12/01/23	K	A	
280. Vanguard Limited Term Tax Exempt Fund Admiral (VMLUX)	B	Dividend			Sold (part)	01/13/23	J	A	
281.					Sold	12/01/23	L	B	
282. Vanguard Ultra Short-term Tax Exempt Fund Class Admiral (VWSUX)	A	Dividend			Sold (part)	01/03/23	K	A	
283.					Sold (part)	04/28/23	K	A	
284.					Sold	08/31/23	K	A	
285. Pimco Enchanced Shrt Maturity Actv ETF (MINT)	A	Dividend			Buy	11/13/23	J		
286.					Sold	12/13/23	J	A	
287. Select Sector Financial Select SPDR ETF (XLF)	A	Dividend	J	T	Buy	11/13/23	J		
288. Account #11 (H)									
289. Schwab Government Money Market Fund (SGUXX) (cash eq.)	A	Dividend	J	T	Buy	11/30/23	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

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290. Dodge & Cox Income (DODIX)	A	Dividend	J	T	Buy	11/30/23	J		
291. Schwab Total Stock Market Index (SWTSX)	A	Dividend	K	T	Sold (part)	01/13/23	J		
292.					Sold (part)	05/22/23	J		
293.					Sold (part)	09/13/23	J		
294.					Buy (add'l)	11/30/23	K		
295. TIAA-CREF International Equity Index (TCIEX) (X)	A	Dividend	J	T	Buy	11/30/23	J		
296. Principal Short Term Income (PSHIX)	A	Dividend	K	T	Sold (part)	01/13/23	K		
297.					Buy (add'l)	11/30/23	K		
298. Apple Inc (AAPL) (X)		None			Buy	11/29/23	K		
299.					Sold	11/30/23	K		
300. Arthur J. Gallagher (AJG) (X)		None			Buy	11/29/23	K		
301.					Sold	11/30/23	K		
302. Account #12 (H)									
303. College Counts Conservative Age Based 15-16		None	N	T					
304. Account #13 (H)									
305. Vanguard Cash Reserves Fed MM 529 Portfolio (cash eq.)	D	Dividend	M	T	Sold (part)	02/01/23	J		
306.					Sold (part)	06/01/23	L		

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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307.					Sold (part)	07/24/23	J		
308.					Sold (part)	10/16/23	J		
309.					Sold (part)	11/28/23	J		
310.					Sold (part)	12/15/23	J		
311. Vanguard Inflation-Protected Securities 529 Portfolio		None	J	T	Sold (part)	01/04/23	J		
312.					Sold (part)	06/01/23	J		
313. Account #14 (H)									
314. Vanguard Cash Reserves Fed MM 529 Portfolio (cash eq.)	D	Dividend	L	T	Sold (part)	05/23/23	J		
315.					Buy (add'l)	06/01/23	L		
316.					Sold (part)	07/24/23	K		
317.					Sold (part)	12/28/23	K		
318. Account #15 (H)									
319. College Counts Conservative Age Based 13-14		None			Sold	08/28/23	N		
320. College Counts Conservative Age Based 15-16		None	N	T	Buy	08/28/23	N		
321. Account #16 (H)									
322. Coins (Ag & Au)		None	J	T	Buy	12/12/23	J		

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

Part V: High Speed Alliance, LLC is owned by a family member. The filer did not attend the cruise.

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value.

Parenthetical numbers in Part VII are CUSIP numbers.

The mineral interest listed in Part VII comprises a fractional interest of an indivisible 1,500 acre parcel that includes portions of Custer, Blaine, Caddo, Canadian, Kingfisher, Grady, Garvin, McClain, Murray, and Stephens Counties in Oklahoma.

Name of Person Reporting	Date of Report
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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/ Robert A. Huffaker, Jr.

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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