AO 10
Rev. 1/2021

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2021

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 101-111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Illston, Susan Y.	Northern District of California	12/09/2022
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**
Senior District Court Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final 5b. ☒ Amended Report	01/01/2021 to 12/31/2021
7. Chambers or Office Address		
U.S. District Court 450 Golden Gate Ave., 17th Floor San Francisco, CA		

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 pp. 9-13 of filing instructions)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Board of Govenors	Association of BUsiness Trial Lawyers, Northern California
2.	Custodian	Insurance Policies
3.	Custodian	Annuities
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions)*

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 AND TYPE
1.		
2.		
3.		
4.		

IV. REIMBURSEMENTS -- *transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)

☑ 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 pp. 28-31 of filing instructions.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Illston, Susan Y.	12/09/2022

VII. INVESTMENTS and TRUSTS – *income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(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)	(5) Identity of buyer/seller (if private transaction)
1. I. (H) Schwab IRA, IRA Rollover									
2. - Alphabet, Inc.		None	K	T	Sold (part)	02/09/21	K	B	
3.					Sold (part)	04/27/21	K	B	
4.					Sold (part)	06/24/21	K	C	
5.					Sold (part)	09/08/21	K	C	
6.					Sold (part)	11/18/21	K	C	
7. - Apple		None			Sold	08/23/21	J	C	
8. - Baird Core Plus	A	Dividend	K	T					
9. - Baker Hughes		None	J	T	Buy	08/19/21	J		
10. - Baron Emerging Markets		None	K	T					
11. - Capital One		None	K	T	Sold (part)	04/30/21	K	C	
12. - Citigroup		None	J	T					
13. - Cohen & Steers	D	Dividend	K	T					
14. - Comcast	A	Dividend	K	T	Sold (part)	09/03/21	K	C	
15. - CVS		None			Sold	05/21/21	J	C	
16. - DFA Emerging		None	K	T	Buy (add'l)	01/26/21	K		
17.					Sold (part)	11/18/21	K	E	

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 pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(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)	(5) Identity of buyer/seller (if private transaction)
18. - DFA Int'l		None	K	T					
19. - DFA US Core Equity		None			Sold	12/17/21	K	E	
20. - Dodge & Cox Income Fund		None	L	T					
21. - Dodge & Cox Int'l		None	K	T					
22. - Dodge & Cox Stock Fund		None	K	T					
23. - Energy Select SPDR		None	L	T	Buy (add'l)	03/02/21	L		
24. - Fedex Corp.		None	K	T	Sold (part)	05/21/21	K	C	
25.					Buy (add'l)	09/22/21	K		
26. - First Eagle Overseas		None	K	T					
27. - Franklin Utilities		None	K	T					
28. - Freeport McMoran Copper		None	J	T	Buy	08/19/21	J		
29.					Buy (add'l)	09/21/21	J		
30. - Goldman Sachs Group		None			Sold (part)	02/17/21	J	B	
31.					Sold (part)	03/03/21	J	C	
32.					Sold (part)	03/12/21	J	B	
33.					Sold	11/05/21	J	B	
34. - GS Bond Inst		None	L	T					

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35. - Ishares Biotech Fund		None	K	T					
36. - Johnson & Johnson		None	K	T					
37. - Matthews Pacific Tiger Fund		None	K	T					
38. - Micron		None	K	T	Buy	10/01/21	K		
39.					Buy (add'l)	10/15/21	K		
40. - Microsoft		None	K	T	Sold (part)	11/05/21	K	C	
41.					Sold (part)	03/26/21	K	B	
42.					Sold (part)	09/28/21	K	B	
43.					Sold (part)	12/16/21	K	C	
44. - JP Morgan		None	K	T					
45. - Novartis AG ADR		None	J	T	Buy	11/09/21	J		
46. - Oracle Corp.		None			Sold	06/11/21	J	E	
47. - Sanofi		None	J	T	Buy	11/16/21	J		
48.					Buy (add'l)	11/22/21	J		
49.					Buy (add'l)	12/07/21	J		
50. - Schwab Cash Sweep			L	T					
51. - Schwab Corp.		None	J	T	Sold (part)	02/04/21	J	C	

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52. - Schwab US REIT ETF		None			Sold	02/01/21	J	D	
53. - T Mobile US Inc.		None	J	T	Buy	09/22/21	J		
54.					Buy (add'l)	10/13/21	J		
55.					Buy (add'l)	12/02/21	J		
56. - T Rowe Price		None	K	T	Buy	01/29/21	K		
57.					Buy (add'l)	01/13/21	K		
58. - Vanguard High Yield Corp.		None			Sold	01/13/21	K	E	
59. - Vanguard Mortgage Backed Sec ETF		None	J	T	Sold (part)	12/14/21	J	D	
60. - Vanguard Short INF Prot			L	T	Sold (part)	04/12/21	L	B	
61.					Sold (part)	11/16/21	L	D	
62. - Verizon Communications		None	J	T	Buy	11/04/21	J		
63. - Volkswagon		None	K	T	Sold (part)	03/18/21	K	C	
64.					Sold (part)	03/19/21	J	E	
65.					Buy (add'l)	03/19/21	K		
66. - Walt Disney		None	K	T	Sold (part)	02/18/21	K	C	
67.					Sold (part)	03/10/21	K	C	
68. - Wells Fargo & Co.		None	K	T	Sold (part)	05/17/21	K	C	

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69. II. (H) Schwab Brokerage Account - Trust									
70. - Alphabet		None	J	T					
71. - Apple Computer		None	J	T	Sold (part)	09/02/21	J	C	
72. - Applied Materials		None	K	T	Sold (part)	01/12/21	K	C	
73.					Sold (part)	02/18/21	K	D	
74.					Sold (part)	03/26/21	K	C	
75.					Sold (part)	04/06/21	K	E	
76. - Baker Hughes	A	Dividend	K	T	Buy	04/19/21	J		
77.					Buy (add'l)	04/22/21	K		
78.					Buy (add'l)	07/21/21	K		
79. - Baron Emerg. Mrkt.		None	K	T					
80. - Cisco Systems Inc.		None	K	T	Buy	02/01/21	J		
81.					Buy (add'l)	02/19/21	J		
82.					Buy (add'l)	05/24/21	J		
83.					Buy (add'l)	11/22/21	K		
84. - Citigroup Inc.		None	K	T	Buy (add'l)	07/21/21	K		
85. - Cohen & Steers		None	J	T					

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86. - CVS Health Corp		None	K	T					
87. - FedEx		None	K	T	Buy (add'l)	09/22/21	K		
88. - Franklin Utilities		None	K	T	Buy (add'l)	03/04/21	K		
89. - Freeport McMoran		None	J	T	Buy	07/21/21	J		
90.					Buy (add'l)	08/19/21	J		
91. - DR Horton Co.		None	K	T					
92. - Molson		None			Sold (part)	01/29/21	J	C	
93.					Sold	02/01/21	J	C	
94. - Novartis		None	J	T	Buy	05/04/21	J		
95. - Pear Tree Polaris		None	K	T					
96. - Pfizer Inc.	A	Dividend	K	T	Buy	02/25/21	J		
97.					Buy (add'l)	03/08/21	J		
98.					Buy (add'l)	04/13/21	K		
99.					Sold (part)	11/09/21	K	C	
100. - Qualcomm		None	K	T					
101. - Rio Tinto ADR		None	K	T					
102. - Schwab Cash Sweep		None	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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103. - Schwab Corp.		None	K	T					
104. - Schwab US REIT ETF		None			Sold	02/01/21	J	D	
105. - T Mobile Inc.		None	K	T	Buy	05/21/21	K		
106.					Buy (add'l)	12/03/21	K		
107.					Buy (add'l)	12/29/21	K		
108. - Van Eck Vectors Gold Miners		None	K	T					
109. - Verizon		None			Buy (add'l)	01/12/21	J		
110.					Buy (add'l)	01/14/21	J		
111.					Buy (add'l)	01/29/21	J		
112.					Buy (add'l)	03/08/21	K		
113.					Buy (add'l)	03/18/21	K		
114.					Buy (add'l)	06/22/21	K		
115.					Buy (add'l)	07/21/21	K		
116.					Sold	12/29/21	K	E	
117. - Viacom CBS		None			Sold (part)	01/27/21	J	D	
118.					Sold (part)	01/29/21	J	D	
119.					Sold (part)	03/08/21	J	C	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
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	(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)	(5) Identity of buyer/seller (if private transaction)
120.					Sold (part)	03/10/21	J	D	
121.					Sold (part)	03/16/21	J	C	
122.					Buy (add'l)	04/22/21	J		
123.					Sold (part)	10/15/21	J	D	
124. - Weyerhaeuser Company		None	K	T					
125. III. (H) Schwab Brokerage Account No. 2 Trust									
126. - DOMIX	A	Dividend	L	T					
127. - DSI	A	Dividend	L	T					
128. - PARMX	A	Dividend	K	T					
129. - PRBLX		None	L	T					
130. - PXWIX		None	L	T					
131. - Schwab Value Advantage Money Fund		None	K	T					
132. - SWZXX (Cash Reserves Money Market Fund)		None	K	T					
133. - VFTSX	A	Dividend	L	T					
134. IV. (H) Northwestern Mutual Life Insurance Assets									
135. - Northwestern Mutual Life Annuity, fixed	A	Interest	M	T					
136. - Northwestern Mutual Life Family's Insurance, whole life		None	N	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
Illston, Susan Y.	12/09/2022

VII. INVESTMENTS and TRUSTS – *income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ 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)	(5) Identity of buyer/seller (if private transaction)
137. - Northwestern Mutual Life Family's Annuities, Fixed	D	Distribution	L	T					
138. - Northwest Mutual Life Insurance Trust		None	P1	T					
139. V. (H) Cash									
140. - Chase Bank Accounts	A	Interest	N	T					
141. - Wells Fargo Bank Accounts	A	Int./Div.	M	T					
142. - Provident Federal Credit Union	A	Interest	O	T					
143.									
144.									
145.									
146.									
147.									
148.									
149.									

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

Name of Person Reporting	Date of Report
Illston, Susan Y.	12/09/2022

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

Part VII, line 138: Northwest Mutual Life Insurance Trust-- no reportable assets in trust.

Name of Person Reporting	Date of Report
Illston, Susan Y.	12/09/2022

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

Signature: **s/ Susan Y. Illston**

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. § 104)

Committee on Financial Disclosure
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