AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

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
Immergut, Karin	U.S. District Court, District of Oregon	04/28/2025
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**
Article III, active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
Hatfield Federal Courthouse 1000 SW Third Avenue Portland, Oregon 97204		

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.	Board Member	Civics Learning Project (formerly known as Classroom Law Project)
2.		
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements.)*

☐ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.	1997	Public Employee Retirement System defined benefit plan
2.	2009	State of Oregon: Judicial Pension
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.	2024	Ball Janik LLP, return of capital from former partnership
2.	2024	Rare Bird Books, royalties from publisher for book sales
3.	2024	Pacific Industrial Corp.DBA Advanced Technology Group, Board of Directors Compensation
4.	2024	[redacted], partnership income

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.	Rodel Leadership Institute	August 26 - September 1, 2024	London and Cambridge, United Kingdom	Non-partisan judicial leadership seminar	Transportation, meals, hotel
2.	University of California, Berkeley Law School	Sept. 22- 24, 2024	Berkeley, CA	Judge-In-Residence speaker to law students regarding path to the bench	Transportation, one dinner, hotel
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
Immergut, Karin	04/28/2025

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.	Inherited IRA (H)									
2.	FIDELITY 500 INDEX FUND FXAIX	A	Dividend	K	T	Sold (part)	12/16/24	J		
3.	GUGGENHEIM TOTAL RETURN BOND FUND INSTITUTIONAL CLASS GIBIX	A	Dividend	K	T					
4.	SPDR BLOOMBERG 1-3 MONTH T-BILL ETF BIL	A	Dividend			Sold	04/17/24	J		
5.	BAIRD INTERMEDIATE BOND INST BIMIX	A	Dividend	K	T	Buy (add'l)	04/17/24	J		
6.	DOUBLELINE LOW DURATION BOND I DBLSX	A	Dividend	J	T					
7.	DODGE & COX INTERNATIONAL STOCK I DODFX	A	Dividend			Sold	09/09/24	J		
8.	GMO RESOURCES I GEACX	A	Dividend			Sold	09/09/24	J		
9.	EUROPACIFIC GROWTH FUND CLASS F3 FEUPX	A	Dividend	J	T	Sold (part)	04/17/24	J		
10.	GUGGENHEIM LIMITED DURATION INSTL GILHX	A	Dividend			Sold	04/17/24	J		
11.	GQG PARTNERS INTL QUAL VAL FD INS	A	Dividend	J	T	Buy	09/09/24	J		
12.	ISHARES IBONDS DEC 2024 TERM TREASURY ETF	A	Dividend			Sold	09/09/24	J		
13.	ISHARES IBONDS DEC 2025 TERM TREASURY ETF	A	Dividend			Sold	09/09/24	J		
14.	ISHARES 1-3 YEAR TREASURY BOND ETF SHY	A	Dividend	J	T	Buy (add'l)	09/09/24	J		
15.	ISHARES 3-7 YEAR TREASURY BOND ETF	A	Dividend	J	T	Buy	09/09/24	J		
16.	ISHARES 7-10 YEAR TREASURY BOND ETF	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
17.	ISHARES 7-10 YEAR TREASURY BOND ETF	A	Dividend	J	T	Buy (add'l)	12/16/24	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
Immergut, Karin	04/28/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
18. JP MORGAN LARGE-CAP GROWTH FUND SELECT CLASS SEEGX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
19. JP MORGAN LARGE-CAP GROWTH FUND SELECT CLASS	A	Dividend	J	T	Sold (part)	12/16/24	J		
20. MFS INTERNATIONAL GROWTH I MQGIX	A	Dividend	J	T					
21. MFS NEW DISCOVERY VALUE FUND CL I NDVIX	A	Dividend	J	T	Sold (part)	12/16/24	J		
22. PIMCO LOW DURATION INCOME INSTL PFIIX	A	Dividend			Sold	04/17/24	J		
23. PIMCO INCOME FUND CLASS I PIMIX	A	Dividend	J	T					
24. SCHWAB FUNDAMENTAL INTL EQUITY INDEX FD	A	Dividend	J	T	Buy	09/09/24	J		
25. SCHWAB FUNDAMENTAL US LARGE COMPANY IDX SFLNX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
26. T. ROWE PRICE QM US SMALL CAP GR EQ I TQAIX	A	Dividend	J	T	Sold (part)	09/09/24	J		
27. VANGUARD MEGA CAP GROWTH ETF	A	Dividend	J	T	Buy	09/09/24	J		
28. VANGUARD SMALL CAP VALUE ETF	A	Dividend	J	T	Buy	09/09/24	J		
29. VANGUARD VALUE VTV	A	Dividend	J	T					
30. TECHNOLOGY SELECT SECTOR SPDR FUND XLK	A	Dividend			Sold	09/09/24	J		
31. Cash Balance Held by Captrust	A	Int./Div.	J	T					
32. Individual - (H)									
33. THORNBURG LIMITED-TERM MUNI INST	D	Dividend	M	T					
34. VANGUARD INTERM-TERM TX-EX ADM VWIUX	D	Dividend	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
Immergut, Karin	04/28/2025

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)	
35.	VANGUARD ULTRA SHORT-TERM TX-EX ADM VWSUX	D	Dividend	N	T					
36.	Schwab Government Money Market Fund	A	Interest	J	T	Sold (part)	01/30/24	J		
37.	Schwab Government Money Market Fund	A	Interest	J	T	Sold (part)	04/26/24	J		
38.	Schwab Government Money Market Fund	A	Interest	J	T	Sold (part)	07/26/24	J		
39.	Schwab Government Money Market Fund	A	Interest	J	T	Sold (part)	10/28/24	J		
40.	Individual Account 1 (H)									
41.	Cash Balance held by Captrust	A	Interest	K	T					
42.	SPDR BLOOMBERG 1-3 MONTH T-BILL ETF	B	Dividend			Sold	04/17/24	L		
43.	CAPITAL GROUP INTERNATIONAL FOCUS EQUITY ETF CGXU	B	Dividend	M	T	Buy (add'l)	04/17/24	K		
44.	DODGE & COX INTERNATIONAL STOCK I	C	Dividend	M	T	Buy (add'l)	04/17/24	K		
45.	SCHWAB FUNDAMENTAL US LARGE CO. INDEX ETF FNDX	B	Dividend	M	T	Buy (add'l)	04/17/24	K		
46.	Fidelity 500 Index Fund FXAIX	D	Dividend	O	T	Sold (part)	04/17/24	L		
47.	GMO RESOURCES I GEACX	A	Dividend			Sold	09/09/24	L		
48.	JPMORGAN ACTIVE GROWTH ETF JGRO	A	Dividend	M	T	Buy (add'l)	04/17/24	K		
49.	JPMORGAN ACTIVE GROWTH ETF JGRO	A	Dividend	M	T	Buy (add'l)	09/09/24	J		
50.	MFS International Growth MQGIX	C	Dividend	M	T	Buy (add'l)	04/17/24	K		
51.	ISHARES MSCI USA MIN VOL FACTOR ETF	A	Dividend			Sold	09/09/24	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		
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
Immergut, Karin	04/28/2025

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)
52.	T. ROWE PRICE QM US SMALL CAP GR EQ I TQAIX	A	Dividend	L	T	Sold (part)	09/09/24	L	
53.	MFS NEW DISCOVERY VALUE I	B	Dividend	M	T	Buy	01/05/24	L	
54.	MFS NEW DISCOVERY VALUE I	B	Dividend	M	T	Buy (add'l)	04/17/24	K	
55.	VANGUARD SMALL CAP VALUE ETF VBR	A	Dividend	L	T	Buy (add'l)	09/09/24	L	
56.	VANGUARD SMALL CAP VALUE ETF VBR	A	Dividend	L	T	Sold (part)	01/05/24	L	
57.	VANGUARD VALUE VTV	C	Dividend	M	T				
58.	Vanguard Growth ETF VUG	C	Dividend	O	T				
59.	VANGUARD INTERNATIONAL HIGH DIVIDEND YIELD ETF	B	Dividend	L	T	Buy	09/09/24	L	
60.	Technology Sector ETF XLK	A	Dividend	L	T	Sold (part)	04/17/24	K	
61.	IRA R/O Account 1 (H)								
62.	Cash Balance held by Captrust	A	Interest	J	T				
63.	SPDR BLOOMBERG 1-3 MONTH T-BILL ETF	A	Dividend			Sold	04/17/24	J	
64.	BAIRD INTERMEDIATE BOND INST	B	Dividend	K	T	Buy (add'l)	04/17/24	J	
65.	DOUBLELINE LOW DURATION BOND I	A	Dividend	K	T				
66.	DODGE & COX INTERNATIONAL STOCK I	A	Dividend			Sold	09/09/24	J	
67.	American Funds Europacific Growth F3 FEUPX	A	Dividend	J	T	Sold (part)	04/17/24	J	
68.	Fidelity 500 Index Fund FXAIX	A	Dividend	L	T	Sold (part)	04/17/24	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
Immergut, Karin	04/28/2025

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)	
69.	GMO RESOURCES I GEACX	A	Dividend			Sold	09/09/24	J		
70.	Guggenheim Total Return Bond GIBIX	B	Dividend	K	T	Buy (add'l)	04/17/24	J		
71.	GUGGENHEIM LIMITED DURATION INSTL GILHX	A	Dividend			Sold	04/17/24	J		
72.	GQG PARTNERS INTL QUAL VAL FD INS	A	Dividend	J	T	Buy	09/09/24	J		
73.	ISHARES IBONDS DEC 2024 TERM TREASURY ETF	A	Dividend			Sold	09/09/24	K		
74.	ISHARES IBONDS DEC 2025 TERM TREASURY ETF	A	Dividend			Sold	09/09/24	J		
75.	ISHARES 7-10 YEAR TREASURY BOND ETF	A	Dividend	K	T	Buy (add'l)	04/17/24	J		
76.	ISHARES 3-7 YEAR TREASURY BOND ETF	A	Dividend	K	T	Buy	09/09/24	K		
77.	ISHARES 1-3 YEAR TREASURY BOND ETF SHY	A	Dividend	K	T	Buy (add'l)	09/09/24	K		
78.	MFS International Growth MQGIX	A	Dividend	J	T					
79.	MFS New Discovery Value Fund NDVIX	A	Dividend	J	T					
80.	PIMCO LOW DURATION INCOME INSTL PFIIX	A	Dividend			Sold	04/17/24	J		
81.	PIMCO Income Fund PIMIX	A	Dividend	K	T					
82.	JP Morgan Large Cap Growth SEEGX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
83.	SCHWAB FUNDAMENTAL US LARGE COMPANY IDX SFLNX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
84.	SCHWAB FUNDAMENTAL INTL EQUITY INDEX FD	A	Dividend	J	T	Buy	09/09/24	J		
85.	T. Rowe Price US Small Cap Growth TQAIX	A	Dividend	J	T	Sold (part)	09/09/24	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
Immergut, Karin	04/28/2025

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)	
86.	Technology Sector ETF XLK	A	Dividend			Sold	09/09/24	J		
87.	VANGUARD SMALL CAP VALUE ETF	A	Dividend	J	T	Buy	09/09/24	J		
88.	VANGUARD MEGA CAP GROWTH ETF	A	Dividend	J	T	Buy	09/09/24	J		
89.	VANGUARD VALUE VTV	A	Dividend	J	T					
90.	iShares MSCI USA MIN VOL ETF	A	Dividend			Sold	09/09/24	J		
91.	Traditional IRA (H)									
92.	Cash Balance held by Captrust	A	Interest	J	T					
93.	SPDR BLOOMBERG 1-3 MONTH T-BILL ETF	A	Dividend			Sold	04/17/24	J		
94.	BAIRD INTERMEDIATE BOND INST BIMIX	B	Dividend	K	T	Buy (add'l)	02/13/24	J		
95.	DOUBLELINE LOW DURATION BOND I	A	Dividend	J	T	Buy (add'l)	02/13/24	J		
96.	AMERICAN FUNDS EUROPACIFIC GROWTH F3 FEUPX	A	Dividend	J	T					
97.	DODGE & COX INTERNATIONAL STOCK I		None			Sold	09/09/24	J		
98.	Fidelity 500 Index FXAIX	A	Dividend	K	T	Sold (part)	04/17/24	J		
99.	GMO RESOURCES I GEACX	A	Dividend			Sold	09/09/24	J		
100.	Guggenheim Total Return Bond GIBIX	B	Dividend	K	T	Buy (add'l)	02/13/24	J		
101.	GUGGENHEIM LIMITED DURATION INSTL GILHX	A	Dividend			Sold	04/17/24	J		
102.	GQG PARTNERS INTL QUAL VAL FD INS	A	Dividend	J	T	Buy	09/09/24	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
Immergut, Karin	04/28/2025

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. ISHARES IBONDS DEC 2024 TERM TREASURY ETF	A	Dividend			Sold	09/09/24	K		
104. ISHARES IBONDS DEC 2025 TERM TREASURY ETF	A	Dividend			Sold	09/09/24	J		
105. ISHARES 7-10 YEAR TREASURY BOND ETF IEF	A	Dividend	J	T	Buy (add'l)	02/13/24	J		
106. ISHARES 3-7 YEAR TREASURY BOND ETF	A	Dividend	J	T	Buy	09/09/24	J		
107. VANGUARD MEGA CAP GROWTH ETF	A	Dividend	J	T	Buy	09/09/24	J		
108. MFS International Growth MQGIX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
109. MFS® New Discovery Value I NDVIX	A	Dividend	J	T					
110. PIMCO LOW DURATION INCOME INSTL PFIIX	A	Dividend			Sold	04/17/24	J		
111. PIMCO Income Fund PIMIX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
112. JP Morgan Large Cap Growth SEEGX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
113. SCHWAB FUNDAMENTAL US LARGE COMPANY IDX SFLNX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
114. SCHWAB FUNDAMENTAL INTL EQUITY INDEX FD	A	Dividend	J	T	Buy	09/09/24	J		
115. iShares 1-3 Year Treasury Bond ETF SHY	A	Dividend	K	T	Buy (add'l)	09/09/24	J		
116. T. Rowe Price US Small Cap Growth TQAIX	A	Dividend	J	T	Sold (part)	09/09/24	J		
117. ISHARES MSCI USA MIN VOL FACTOR ETF	A	Dividend			Buy	04/17/24	J		
118. ISHARES MSCI USA MIN VOL FACTOR ETF	A	Dividend			Sold	09/09/24	J		
119. VANGUARD SMALL CAP VALUE ETF	A	Dividend	J	T	Buy	09/09/24	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
Immergut, Karin	04/28/2025

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. VANGUARD VALUE VTV	A	Dividend	J	T					
121. Technology Sector ETF XLK	A	Dividend			Sold	09/09/24	J		
122. 401k (H)									
123. Life Path 2030		None	N	T					
124. 401K Account (H)									
125. Vanguard Total Int'l Stock Index Admiral	F	Dividend	O	T					
126. Vanguard Total Bond Market Index Admiral	G	Dividend	P1	T					
127. Vanguard 500 Index Admiral	G	Dividend	P1	T					
128. Wells Fargo Bank Accounts	C	Interest	O	T					
129. Oregon Venture Fund (formerly Angel Fund)	F	Distribution	N	T					
130. State Judicial Pension (PERS)		None	M	T					
131. Indv Acct (H)									
132. Schwab Money Market	A	Interest	J	T	Sold (part)	01/10/24	J		
133. Schwab Money Market	A	Interest	J	T	Sold (part)	04/26/24	J		
134. Schwab Money Market	A	Interest	J	T	Sold (part)	07/26/24	J		
135. Schwab Money Market	A	Interest	J	T	Sold (part)	10/28/24	J		
136. Thornburg Limited-Term Muni	D	Dividend	M	T					

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

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

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

Name of Person Reporting	Date of Report
Immergut, Karin	04/28/2025

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. Vanguard Interm-term VWIUX	D	Dividend	N	T					
138. Vanguard Short-term VWSUX	D	Dividend	N	T					
139. Individual Account 2 (H)									
140. Cash Balance Held by Captrust	A	Interest	K	T					
141. SPDR BLOOMBERG 1-3 MONTH T-BILL ETF	A	Dividend			Sold	04/17/24	L		
142. Capital Group International Focus Equity	B	Dividend	M	T	Buy (add'l)	04/17/24	J		
143. DODGE & COX INTERNATIONAL STOCK I	B	Dividend	M	T	Buy (add'l)	04/17/24	J		
144. SCHWAB FUNDAMENTAL US LARGE CO. INDEX ETF FNDX	B	Dividend	L	T	Buy (add'l)	04/17/24	K		
145. FIDELITY 500 INDEX FUND FXAIX	D	Dividend	O	T	Sold (part)	04/17/24	L		
146. GMO RESOURCES I GEACX	A	Dividend			Sold	09/09/24	K		
147. JPMORGAN ACTIVE GROWTH ETF JGRO	A	Dividend	M	T	Buy (add'l)	04/17/24	K		
148. VANGUARD MEGA CAP GROWTH ETF	A	Dividend	L	T	Buy	09/09/24	K		
149. MFS INTERNATIONAL GROWTH I	B	Dividend	M	T	Buy (add'l)	04/17/24	K		
150. MFS NEW DISCOVERY VALUE I	B	Dividend	L	T	Buy	01/05/24	L		
151. ISHARES MSCI USA MIN VOL FACTOR ETF	A	Dividend			Sold	09/09/24	L		
152. T. ROWE PRICE QM US SMALL CAP GR EQ I TQAIX	A	Dividend	L	T	Sold (part)	09/09/24	L		
153. VANGUARD SMALL CAP VALUE ETF VBR	A	Dividend	L	T	Sold (part)	01/05/24	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
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
Immergut, Karin	04/28/2025

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. VANGUARD SMALL CAP VALUE ETF VBR	A	Dividend	L	T	Buy (add'l)	09/09/24	L		
155. VANGUARD VALUE VTV	C	Dividend	M	T	Buy (add'l)	04/17/24	J		
156. Vanguard Growth ETF VUG	B	Dividend	N	T					
157. VANGUARD INTERNATIONAL HIGH DIVIDEND YIELD ETF	B	Dividend	L	T	Buy	09/09/24	L		
158. TECHNOLOGY SELECT SECTOR SPDR FUND XLK	A	Dividend			Sold	04/17/24	J		
159. IRA R/O 3 (H)									
160. Cash Balance Held by Captrust	A	Interest	J	T					
161. SPDR BLOOMBERG 1-3 MONTH T-BILL ETF	A	Dividend			Sold	04/17/24	J		
162. BAIRD INTERMEDIATE BOND INST	C	Dividend	L	T	Buy (add'l)	04/17/24	J		
163. DOUBLELINE LOW DURATION BOND I	B	Dividend	K	T	Buy (add'l)	04/17/24	J		
164. DODGE & COX INTERNATIONAL STOCK I		None			Sold	09/09/24	K		
165. EUROPACIFIC GROWTH FUND CLASS F3 FEUPX	A	Dividend	K	T	Sold (part)	04/17/24	J		
166. FIDELITY 500 INDEX FUND FXAIX	B	Dividend	M	T	Sold (part)	04/17/24	K		
167. GMO RESOURCES I GEACX	A	Dividend			Sold	09/09/24	J		
168. GUGGENHEIM TOTAL RETURN BOND FUND INSTITUTIONAL GIBIX CLASS	C	Dividend	L	T	Buy (add'l)	04/17/24	J		
169. GUGGENHEIM LIMITED DURATION INSTL GILHX	A	Dividend			Sold	04/17/24	J		
170. GQG PARTNERS INTL QUAL VAL FD INS	A	Dividend	J	T	Buy	09/09/24	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
Immergut, Karin	04/28/2025

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. ISHARES IBONDS DEC 2024 TERM TREASURY ETF	B	Dividend			Sold	09/09/24	K		
172. ISHARES IBONDS DEC 2025 TERM TREASURY ETF	A	Dividend			Sold	09/09/24	K		
173. ISHARES 7-10 YEAR TREASURY BOND ETF IEF	A	Dividend	K	T	Buy (add'l)	04/17/24	J		
174. ISHARES 3-7 YEAR TREASURY BOND ETF	A	Dividend	K	T	Buy	09/09/24	K		
175. VANGUARD MEGA CAP GROWTH ETF	A	Dividend	K	T	Buy	09/09/24	K		
176. MFS INTERNATIONAL GROWTH FD CL I MQGIX	A	Dividend	K	T					
177. MFS NEW DISCOVERY VALUE FUND CL I NDVIX	A	Dividend	J	T					
178. PIMCO LOW DURATION INCOME INSTL PFIIX	A	Dividend			Sold	04/17/24	J		
179. PIMCO INCOME FUND INSTITUTIONAL FUND PIMIX	B	Dividend	K	T					
180. JP MORGAN LARGE-CAP GROWTH FUND SELECT CLASS SEEGX	A	Dividend	K	T	Buy (add'l)	04/17/24	J		
181. SCHWAB FUNDAMENTAL US LARGE COMPANY IDX SFLNX	A	Dividend	K	T	Buy (add'l)	04/17/24	J		
182. SCHWAB FUNDAMENTAL INTL EQUITY INDEX FD	A	Dividend	K	T	Buy	09/09/24	K		
183. ISHARES 1-3 YEAR TREASURY BOND ETF SHY	A	Dividend	K	T	Buy (add'l)	09/09/24	K		
184. T. ROWE PRICE QM US SMALL CAP GR EQ I TQAIX	A	Dividend	J	T	Sold (part)	09/09/24	J		
185. VANGUARD SMALL CAP VALUE ETF	A	Dividend	J	T	Buy	09/09/24	J		
186. VANGUARD VALUE VTV	A	Dividend	K	T					
187. TECHNOLOGY SELECT SECTOR SPDR FUND XLK	A	Dividend			Sold	09/09/24	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
Immergut, Karin	04/28/2025

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. IRA 4 - Traditional (H)									
189. Cash Balance Held by Captrust	A	Interest	J	T					
190. SPDR BLOOMBERG 1-3 MONTH T-BILL ETF	A	Dividend			Sold	04/17/24	J		
191. BAIRD INTERMEDIATE BOND INST	B	Dividend	K	T	Buy (add'l)	02/13/24	J		
192. DOUBLELINE LOW DURATION BOND I	A	Dividend	J	T	Buy (add'l)	02/13/24	J		
193. DODGE & COX INTERNATIONAL STOCK I		None			Sold	09/09/24	J		
194. American Funds Europacific Growth F3 FEUPX	A	Dividend	J	T					
195. FIDELITY 500 INDEX FUND FXAIX	A	Dividend	K	T	Sold (part)	04/17/24	J		
196. GMO RESOURCES I GEACX	A	Dividend			Sold	09/09/24	J		
197. GUGGENHEIM TOTAL RETURN BOND FUND INSTITUTIONAL GIBIX CLASS	B	Dividend	K	T	Buy (add'l)	02/13/24	J		
198. GUGGENHEIM LIMITED DURATION INSTL GILHX	A	Dividend			Sold	04/17/24	J		
199. GQG PARTNERS INTL QUAL VAL FD INS	A	Dividend	J	T	Buy	09/09/24	J		
200. ISHARES IBONDS DEC 2024 TERM TREASURY ETF	A	Dividend			Sold	09/09/24	J		
201. ISHARES IBONDS DEC 2025 TERM TREASURY ETF	A	Dividend			Sold	09/09/24	J		
202. ISHARES 7-10 YEAR TREASURY BOND ETF IEF	A	Dividend	J	T	Buy (add'l)	02/13/24	J		
203. ISHARES 3-7 YEAR TREASURY BOND ETF	A	Dividend	J	T	Buy	09/09/24	J		
204. VANGUARD MEGA CAP GROWTH ETF	A	Dividend	J	T	Buy	09/09/24	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
Immergut, Karin	04/28/2025

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. MFS INTERNATIONAL GROWTH FD CL I MQGIX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
206. MFS® New Discovery Value I NDVIX	A	Dividend	J	T					
207. PIMCO LOW DURATION INCOME INSTL PFIIX	A	Dividend			Sold	04/17/24	J		
208. PIMCO INCOME FUND INSTITUTIONAL FUND PIMIX	A	Dividend	J	T					
209. JP MORGAN LARGE-CAP GROWTH FUND SELECT CLASS SEEGX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
210. SCHWAB FUNDAMENTAL US LARGE COMPANY IDX SFLNX	A	Dividend	J	T	Buy (add'l)	04/17/24	J		
211. SCHWAB FUNDAMENTAL INTL EQUITY INDEX FD	A	Dividend	J	T	Buy	09/09/24	J		
212. ISHARES 1-3 YEAR TREASURY BOND ETF SHY	A	Dividend	K	T	Buy (add'l)	09/09/24	J		
213. T. ROWE PRICE QM US SMALL CAP GR EQ I TQAIX	A	Dividend	J	T	Sold (part)	09/09/24	J		
214. VANGUARD SMALL CAP VALUE ETF	A	Dividend	J	T	Buy	09/09/24	J		
215. TECHNOLOGY SELECT SECTOR SPDR FUND XLK	A	Dividend			Sold	09/09/24	J		
216. VANGUARD VALUE VTV	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		

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

Name of Person Reporting	Date of Report
Immergut, Karin	04/28/2025

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/ Karin Immergut

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
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544