AO 10
Rev. 1/2021

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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
Jackson, Amy B.	United States District Court for the District of Columbia	05/12/2023
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	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
United States District Court for the District of Columbia 333 Constitution Avenue, N.W. Washington, D.C. 20001		

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.		
2.		
3.		
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.	2022	Orrick Herrington & Sutcliffe LLP - law firm partnership income
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
Jackson, Amy B.	05/12/2023

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. INDIVIDUAL ASSETS (H)									
2. CAPITAL ONE (CASH)	A	Interest	K	T					
3. WELLS FARGO (CASH)	A	Interest	L	T					
4. DC COLLEGE SAVINGS IN COLLEGE PORTFOLIO (X)		None	K	T	Sold (part)	01/21/22	J		
5.					Sold (part)	08/15/22	J		
6.					Sold (part)	09/26/22	J		
7. DC COLLEGE SAVINGS PLAN 17+ (Y)									
8. AUTUMN WOODS LIMITED PARTNERSHIP	E	Distribution	O	W					
9. ACCOUNT #1 (H)									
10. CHARLES SCHWAB BANK (CASH)	A	Interest	K	T					
11. (AVEM)	A	Dividend	J	T	Buy	09/30/22	J		
12. (AVDE)	A	Dividend	K	T	Buy	09/19/22	K		
13.					Buy (add'l)	09/30/22	J		
14. (AVUS)	A	Dividend	L	T	Buy	09/30/22	L		
15. (GEM)		None	J	T	Buy	09/30/22	J		
16. (GSLC)		None	L	T	Buy	09/30/22	L		
17. (GSIE)	A	Dividend	K	T	Buy	09/19/22	K		

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

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

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/12/2023

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.					Buy (add'l)	09/30/22	J		
19. (IJR)	A	Dividend	L	T	Buy	09/19/22	L		
20. (ACWV)	A	Dividend	L	T	Buy	09/30/22	L		
21. (JSCP)		None	K	T	Buy	12/27/22	K		
22. (VCSH)	A	Dividend	K	T	Buy (add'l)	03/31/22	J		
23. (VTI)	B	Dividend			Sold (part)	09/19/22	K		
24.					Sold	09/30/22	M		
25. (FPNIX)	B	Dividend	L	T					
26. (MNCPX)	B	Dividend	L	T	Buy	03/31/22	L		
27. (LLDYX)	A	Dividend			Sold	03/31/22	L		
28. (MWCIX)	C	Dividend	L	T					
29. (VSCSX)	B	Dividend	K	T	Sold (part)	09/19/22	K		
30.					Sold (part)	10/03/22	K		
31. (DGLRX)	D	Dividend	L	T					
32. (CVMIX)		None			Sold	10/03/22	K		
33. (SGTTX)	B	Dividend	K	T					
34. (DFDPX)		None			Sold	09/19/22	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
Jackson, Amy B.	05/12/2023

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)
35. (CSMCX)		None	K	T	Buy	09/19/22	L		
36. (FPACX)	A	Dividend	L	T					
37. (GISYX)	A	Dividend	L	T	Buy (add'l)	10/03/22	L		
38. (HGXYX)		None			Buy	03/28/22	L		
39.					Sold	10/03/22	K		
40. (EMVIX)		None	K	T					
41. (OGIYX)		None			Sold	03/28/22	M		
42. (JNBSX)	B	Dividend	K	T					
43. (MICSX)	A	Dividend			Sold	09/19/22	K		
44. (TRAIX)	D	Dividend	L	T	Sold (part)	10/03/22	J		
45. (TRGLX)		None	L	T	Buy	01/25/22	J		
46.					Buy (add'l)	03/28/22	L		
47.					Buy (add'l)	10/03/22	K		
48. (THISX)	A	Dividend	L	T					
49. (VDIGX)	D	Dividend	L	T					
50. (VIISX)		None			Sold	10/03/22	L		
51. ACCOUNT #2 (H)									

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
Jackson, Amy B.	05/12/2023

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)
52. BANK OF AMERICA (CASH)	A	Interest	L	T					
53. GOLDMAN SACHS BANK (CASH)	A	Interest			Closed	01/24/22	K		
54. (AGTHX)	B	Dividend	K	T					
55. (MDLOX)	D	Dividend	L	T					
56. (MDDVX)	D	Dividend	L	T					
57. (BPIRX)	C	Dividend	K	T					
58. (SGENX)	D	Dividend	M	T					
59. (VTI)	B	Dividend	M	T					
60. ACCOUNT #3 (H)									
61. RBC INSURED DEPOSITS (CASH)	A	Int./Div.	M	T					
62. (JEPI)	C	Dividend	M	T	Buy	06/21/22	K		
63.					Buy (add'l)	11/21/22	L		
64. (DODGX)	D	Dividend	M	T					
65. (OANMX)		None	L	T	Sold (part)	04/06/22	L		
66. (HLIEX)	D	Dividend	N	T	Buy (add'l)	06/21/22	K		
67.					Buy (add'l)	09/01/22	K		
68.					Buy (add'l)	11/14/22	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
Jackson, Amy B.	05/12/2023

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)
69. (NBPIX)		None	M	T	Buy (add'l)	05/17/22	K		
70.					Buy (add'l)	06/21/22	K		
71. (PRILX)	D	Dividend	M	T	Sold (part)	09/30/22	M	D	
72.					Sold (part)	10/04/22	K		
73. (MRFOX)	B	Dividend	N	T	Buy (add'l)	01/19/22	L		
74.					Buy (add'l)	06/21/22	K		
75.					Buy (add'l)	11/14/22	L		
76. (VIG)	C	Dividend	M	T	Buy (add'l)	05/17/22	K		
77. (VHT)	A	Dividend	L	T					
78. (DHS)	A	Dividend	L	T	Buy	11/21/22	L		
79. (IJH)	B	Dividend	L	T					
80. (IEO)	B	Dividend	K	T					
81. (VO)	B	Dividend	L	T					
82. (IJT)	A	Dividend	K	T					
83. (SLY)	A	Dividend	K	T					
84. (NEAR)	C	Dividend	M	T					
85. (USFR)	B	Dividend	M	T	Buy	08/31/22	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
Jackson, Amy B.	05/12/2023

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)
86.					Buy (add'l)	09/30/22	K		
87.					Buy (add'l)	11/14/22	K		
88. (XTN)	A	Dividend			Sold	04/06/22	K		
89. (BGAIX)		None			Sold	01/19/22	L		
90. (DODWX)		None			Buy (add'l)	02/17/22	K		
91.					Sold	09/28/22	L		
92. (DODFX)		None			Buy	02/01/22	M		
93.					Buy (add'l)	02/17/22	K		
94.					Sold	08/24/22	M		
95. (AEPFX)	A	Dividend			Sold	08/24/22	K		
96. (OANWX)	B	Dividend			Sold	04/26/22	L		
97. (MFAIX)		None			Sold	02/01/22	M	D	
98. (VTWAX)	A	Dividend			Sold	09/01/22	K		
99. (BSIIX)	B	Dividend			Sold	08/31/22	L		
100. (LUBFX)	A	Dividend			Sold	08/04/22	M		
101. US TREASURY BILL (912796YC7)		None			Buy	08/04/22	K		
102.					Redeemed	10/04/22	K	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		
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
Jackson, Amy B.	05/12/2023

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)
103. US TREASURY BILL (912796ZL6)		None	L	T	Buy	09/30/22	L		
104. US TREASURY BILL (912796534)		None	K	T	Buy	08/04/22	K		
105. FREDDIE MAC BOND (3134GXFB5)		None	K	T	Buy	08/04/22	K		
106. US TREASURY BILL (912796YM5)		None	K	T	Buy	10/04/22	K		
107. US TREASURY BILL (912796XQ7)		None	K	T	Buy	08/04/22	K		
108. (PFPLX)	A	Dividend			Sold	02/17/22	M		
109. (AMBFX)	C	Dividend			Sold (part)	05/03/22	M		
110.					Sold	06/21/22	M	C	
111. (FBETX)	D	Dividend	M	T					
112. (CAIFX)	B	Dividend	L	T	Buy	04/26/22	L		
113. (AMEFX)	D	Dividend	L	T					
114. (MBXIX)	E	Dividend	M	T	Buy	08/24/22	M		
115.					Buy (add'l)	09/28/22	L		
116.					Sold (part)	09/30/22	K		
117. (VWENX)	D	Dividend	L	T					
118. (HDGE)		None			Buy	08/02/22	K		
119.					Buy (add'l)	08/15/22	J		

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/12/2023

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)
120.					Sold (part)	09/01/22	K	B	
121.					Sold (part)	09/06/22	K	B	
122.					Buy (add'l)	09/22/22	L		
123.					Sold	10/19/22	L	B	
124. (JHEQX)	B	Dividend			Sold	11/21/22	M	B	
125. (PQTPX)	C	Dividend			Buy	05/03/22	M		
126.					Sold	11/14/22	M		
127. (DWSH)		None			Buy	06/07/22	L		
128.					Sold (part)	06/13/22	L	D	
129.					Sold	06/14/22	K	B	
130. CALL IEO		None			Buy	05/31/22	J		
131.					Expired	12/19/22	J		
132. ACCOUNT #4 (H)									
133. CS BANK SWEEP (CASH)	A	Interest	J	T					
134. (AVDE)		None	K	T	Buy	09/19/22	J		
135.					Buy (add'l)	09/30/22	J		
136. (AVUV)		None	J	T	Buy	09/30/22	J		

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/12/2023

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)
137. (DFAU)	A	Dividend	K	T	Buy	11/23/22	K		
138. (GSIE)	A	Dividend	K	T	Buy	09/19/22	J		
139.					Buy (add'l)	09/30/22	J		
140. (IJR)		None	J	T	Buy	09/30/22	J		
141. (JSCP)		None	K	T	Buy	12/06/22	K		
142. (ACWV)		None			Buy	09/19/22	J		
143.					Sold	09/30/22	J		
144. (VCSH)	A	Dividend			Buy (add'l)	03/31/22	J		
145.					Sold	09/19/22	K		
146. (VTI)	A	Dividend	K	T	Sold (part)	09/19/22	J		
147. (FPNIX)	A	Dividend	K	T	Buy (add'l)	06/14/22	J		
148. (MNCPX)	A	Dividend	K	T	Buy	03/31/22	K		
149. (LLDYX)	A	Dividend			Sold	03/31/22	K		
150. (MWCIX)	B	Dividend	K	T	Sold (part)	06/14/22	K		
151.					Buy (add'l)	09/19/22	K		
152. (VUSFX)	A	Dividend			Sold	04/11/22	K		
153. (DGLRX)	A	Dividend			Sold	09/19/22	K		

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/12/2023

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)
154. (FPACX)	A	Dividend			Sold	10/03/22	K		
155. (GISYX)		None	J	T	Buy	09/19/22	J		
156. (EMVIX)	C	Dividend	J	T					
157. (JNBSX)	A	Dividend			Sold	09/19/22	K		
158. (TRAIX)	B	Dividend	J	T	Buy (add'l)	09/19/22	J		
159.					Sold (part)	11/23/22	K		
160. (TRGLX)		None	J	T	Buy	09/19/22	J		
161. (VDIGX)	B	Dividend	K	T					
162. (VIISX)		None			Sold	09/19/22	J		
163. ACCOUNT #5 (H)									
164. ML BANK DEPOSIT PROGRAM (CASH)	A	Interest	K	T					
165. SAFRA NATIONAL BANK (cash)		None	J	T	Open	07/07/22	J		
166. (BRKB)		None			Sold	07/07/22	L	E	
167. (GFFFX)	B	Dividend	K	T					
168. (BIBDX)		None	K	T	Buy	12/23/22	K		
169. (MACPX)		None	L	T	Buy	12/23/22	L		
170. (MADVX)	D	Dividend			Sold	12/23/22	K		

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

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

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/12/2023

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)
171. (MALOX)	C	Dividend			Sold	12/23/22	L		
172. (SGIIX)	C	Dividend	M	T					
173. (SPHD)	A	Dividend	J	T	Buy	07/11/22	J		
174. (QQQ)	A	Dividend	K	T					
175. (DGRO)	A	Dividend	J	T	Buy	07/11/22	J		
176. (VTI)	B	Dividend	L	T					
177. (VO)	A	Dividend	J	T	Buy	07/11/22	J		
178. ACCOUNT #6 (H)									
179. RBC CASH PLUS (CASH)	A	Interest	K	T					
180. (JEPI)	C	Dividend	L	T	Buy (add'l)	02/18/22	J		
181.					Buy (add'l)	02/24/22	J		
182.					Buy (add'l)	06/16/22	J		
183.					Buy (add'l)	08/24/22	J		
184.					Buy (add'l)	10/07/22	K		
185. (OANMX)	A	Dividend	K	T	Buy (add'l)	10/07/22	J		
186. (HLIEX)	A	Dividend	J	T	Buy	11/14/22	J		
187. (PRILX)	B	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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/12/2023

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)
188. (AKRIX)	A	Dividend	J	T					
189. (MRFOX)	A	Dividend	L	T	Buy (add'l)	01/07/22	J		
190.					Buy (add'l)	10/07/22	J		
191.					Buy (add'l)	11/14/22	J		
192. (VIG)	A	Dividend	K	T	Buy (add'l)	10/07/22	J		
193. (DHS)	A	Dividend	K	T	Buy	05/02/22	J		
194.					Buy (add'l)	10/07/22	J		
195. (HNRIX)	A	Dividend	K	T					
196. (IEO)	B	Dividend	K	T					
197. (COWZ)	A	Dividend	K	T	Buy	02/18/22	J		
198.					Buy (add'l)	10/07/22	J		
199. (CPODX)		None			Sold	01/07/22	J	A	
200. (XOP)	A	Dividend	K	T					
201. (SLYV)	A	Dividend	K	T					
202. (VB)	A	Dividend	J	T	Buy (add'l)	10/07/22	J		
203. (FTSM)	A	Dividend	K	T	Buy	08/08/22	K		
204. (USFR)	A	Dividend	K	T	Buy	08/08/22	K		

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/12/2023

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)
205.					Buy (add'l)	10/07/22	K		
206.					Buy (add'l)	11/14/22	J		
207. US TREASURY BILL (912796YU7)		None	K	T	Buy	10/17/22	K		
208. (MBXIX)	C	Dividend	L	T	Buy	10/07/22	L		
209. (XTN)	A	Dividend			Sold	04/06/22	J		
210. (DGT)	A	Dividend			Buy (add'l)	02/18/22	J		
211.					Sold	10/07/22	J		
212. (WCMIX)		None			Sold	05/03/22	J		
213. (DEM)	A	Dividend			Buy	02/18/22	J		
214.					Sold	10/07/22	J		
215. (LUBFX)	A	Dividend			Sold	08/08/22	K		
216. (HDGE)		None			Buy (add'l)	01/14/22	J		
217.					Buy (add'l)	01/21/22	J		
218.					Sold	01/28/22	K	B	
219.					Buy	02/01/22	J		
220.					Buy (add'l)	02/02/22	J		
221.					Sold	02/15/22	J		

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/12/2023

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)
222.					Buy	04/11/22	J		
223.					Buy (add'l)	04/21/22	J		
224.					Sold	05/09/22	K	B	
225.					Buy	08/02/22	J		
226.					Sold (part)	09/01/22	J	A	
227.					Sold (part)	09/06/22	J	A	
228.					Buy (add'l)	09/22/22	J		
229.					Sold	10/19/22	J	A	
230. (COMB)		None			Buy	02/23/22	J		
231.					Sold	05/02/22	J	A	
232. (BAR)		None			Buy (add'l)	02/17/22	J		
233.					Sold	10/07/22	K		
234. (PQTPX)	A	Dividend			Buy	05/03/22	J		
235.					Buy (add'l)	05/06/22	K		
236.					Sold	11/14/22	K		
237. (DWSH)		None			Buy	06/07/22	J		
238.					Sold (part)	06/13/22	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		
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
Jackson, Amy B.	05/12/2023

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)
239.					Sold	06/14/22	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		
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
Jackson, Amy B.	05/12/2023

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

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, per page 45 of the filing instructions.

Parenthetical numbers in Part VII are CUSIP numbers.

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/12/2023

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/ Amy B. Jackson

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
Administrative Office of the United States Courts
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544