AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 13101-13111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Jackson, Amy B.	United States District Court for the District of Columbia	05/15/2024
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 - Senior	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
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 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.		
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.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE
1.	2023	Self-employed (lawyer)
2.		
3.		
4.		

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

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☐ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	National Association of Criminal Defense Lawyers (NACDL)	Speaker	Aspen, CO	Speaker	Travel and Lodging
2.					
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
Jackson, Amy B.	05/15/2024

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

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

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure		B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
1.	INDIVIDUAL ASSETS (H)									
2.	CAPITAL ONE (cash)	A	Interest	K	T					
3.	TD BANK (cash) (X)	A	Interest	L	T					
4.	WELLS FARGO (cash) (Y)									
5.	DC COLLEGE SAVINGS IN COLLEGE PORTFOLIO		None	K	T					
6.	AUTUMN WOODS LIMITED PARTNERSHIP	E	Distribution	O	W					
7.	WMS PRIVATE INCOME FUND I, LLC (X)	E	Dividend	M	U					
8.	ACCOUNT #1 (H)									
9.	CHARLES BANK (cash)	A	Interest	K	T					
10.	(SWVXX) (cash eq.)	B	Dividend	K	T	Buy	02/24/23	K		
11.						Buy (add'l)	09/22/23	J		
12.	(VCSH)	A	Dividend			Sold	09/22/23	K		
13.	(FPNIX)	C	Dividend	L	T	Sold (part)	02/24/23	K		
14.	(GMOLX)	C	Dividend	L	T	Buy	09/07/23	L		
15.						Buy (add'l)	12/22/23	J		
16.	(GRIOX)	A	Dividend	K	T	Buy	09/22/23	K		
17.	(MNCPX)	C	Dividend	L	T					

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/15/2024

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. (MWCIX)	C	Dividend			Sold (part)	02/24/23	J		
19.					Sold	09/07/23	L		
20. (VSCSX)	A	Dividend			Sold	02/24/23	K		
21. (DGLRX)		None			Sold	02/24/23	L		
22. (SGTTX)	C	Dividend	L	T					
23. (CSMCX)		None	L	T	Buy (add'l)	02/24/23	K		
24. (FPACX)		None			Sold	02/24/23	L		
25. (GISYX)	A	Dividend	L	T					
26. (EMVIX)		None			Sold	02/24/23	K		
27. (JNBSX)	A	Dividend			Sold	02/24/23	K		
28. (TRAIX)	C	Dividend	L	T					
29. (TRGLX)	A	Dividend	M	T	Buy (add'l)	02/24/23	J		
30. (THISX)	C	Dividend	L	T					
31. (VDIGX)	B	Dividend	M	T					
32. (AVEM)	B	Dividend	L	T	Buy (add'l)	02/24/23	K		
33. (AVDE)	C	Dividend	M	T	Buy (add'l)	02/24/23	L		
34. (AVUS)	A	Dividend	L	T					

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/15/2024

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. (AVUV)	B	Dividend	L	T	Buy	02/24/23	L		
36. (GEM)	B	Dividend	L	T	Buy (add'l)	02/24/23	K		
37. (GSLC)	B	Dividend	M	T	Buy (add'l)	02/24/23	K		
38. (GSIE)	A	Dividend			Sold	02/24/23	K		
39. (IJR)		None			Sold	02/24/23	L		
40. (ACWV)		None			Sold	02/24/23	L		
41. (HTRB)	A	Dividend	J	T	Buy	09/22/23	J		
42. (JCPB)	C	Dividend	M	T	Buy	02/24/23	M		
43. (JSCP)	A	Dividend	K	T	Buy (add'l)	12/26/23	J		
44. ACCOUNT #2 (H)									
45. BANK OF AMERICA (cash)	A	Interest	K	T					
46. TIAA FSB (cash)		None			Open	06/21/23	K		
47.					Closed	12/21/23	K		
48. BANK OF INDIA (cash)		None	J	T	Open	09/21/23	J		
49. MORGAN STANLEY BANK (cash)		None	J	T	Open	09/21/23	J		
50. (AGTHX)	B	Dividend	K	T					
51. (MDLOX)	D	Dividend	L	T					

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

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

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/15/2024

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)	
52. (MDDVX)	D	Dividend	L	T					
53. (BPIRX)	C	Dividend			Sold	09/21/23	K		
54. (SGENX)	D	Dividend	M	T					
55. (VTI)	B	Dividend	M	T					
56. ACCOUNT #3 (H)									
57. BANK OF AMERICA (cash)	A	Interest	L	T	Open	07/27/23	O		
58. RBC INSURED DEPOSITS (cash)	A	Interest			Closed	07/27/23	O		
59. (BEMXX) (cash eq.)	D	Dividend	N	T	Buy	08/09/23	N		
60.					Buy (add'l)	08/10/23	L		
61.					Sold (part)	11/06/23	K		
62.					Buy (add'l)	11/13/23	J		
63. (AMBFX)	C	Dividend	M	T	Buy	08/09/23	M		
64.					Buy (add'l)	08/10/23	K		
65.					Sold (part)	11/06/23	J		
66. (MIAYX)	B	Dividend	L	T	Buy	08/09/23	L		
67.					Buy (add'l)	08/10/23	K		
68.					Sold (part)	11/06/23	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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.	05/15/2024

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. (ABNFX)	B	Dividend	L	T	Buy	08/09/23	L		
70.					Buy (add'l)	08/10/23	K		
71.					Sold (part)	11/06/23	J		
72. (CAIFX)	C	Dividend	M	T	Sold (part)	06/09/23	L		
73.					Buy (add'l)	08/09/23	M		
74.					Buy (add'l)	08/10/23	K		
75.					Sold (part)	11/06/23	J		
76.					Buy (add'l)	11/13/23	J		
77. (GFFFX)	D	Dividend	M	T	Buy	08/09/23	L		
78.					Buy (add'l)	08/10/23	K		
79.					Sold (part)	11/06/23	J		
80.					Sold (part)	11/13/23	J		
81. (SMCFX)	B	Dividend	M	T	Buy	08/09/23	M		
82.					Buy (add'l)	08/10/23	K		
83.					Buy (add'l)	11/13/23	J		
84. (WGIFX)	D	Dividend	N	T	Buy	08/09/23	N		
85.					Buy (add'l)	08/10/23	L		

1. Income Gain Codes: (See Columns B1 and D4) A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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.	05/15/2024

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)	
86.					Sold (part)	11/06/23	J		
87. (WMFFX)	D	Dividend	M	T	Buy	08/09/23	M		
88.					Buy (add'l)	08/10/23	K		
89.					Sold (part)	11/06/23	J		
90. (ICAFX)	E	Dividend	N	T	Buy	08/09/23	N		
91.					Buy (add'l)	08/10/23	L		
92.					Sold (part)	11/06/23	J		
93.					Sold (part)	11/13/23	J		
94. (ANBFX)	B	Dividend	L	T	Buy	08/09/23	L		
95.					Buy (add'l)	08/10/23	K		
96.					Sold (part)	11/06/23	J		
97.					Buy (add'l)	11/13/23	J		
98. (MADVX)	D	Dividend	M	T	Buy	08/09/23	L		
99.					Buy (add'l)	08/10/23	K		
100.					Buy (add'l)	10/17/23	J		
101.					Sold (part)	11/06/23	J		
102.					Buy (add'l)	11/13/23	J		

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

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.	05/15/2024

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. (MADCX)	B	Dividend	M	T	Buy	08/09/23	L		
104.					Buy (add'l)	08/10/23	K		
105.					Buy (add'l)	10/17/23	J		
106.					Sold (part)	11/06/23	J		
107. (EGFIX)		None	L	T	Buy	08/09/23	L		
108.					Buy (add'l)	08/10/23	K		
109.					Sold (part)	11/06/23	J		
110.					Sold (part)	11/13/23	J		
111. (FTHSX)	B	Dividend	L	T	Buy	08/09/23	L		
112.					Buy (add'l)	08/10/23	K		
113.					Buy (add'l)	10/17/23	J		
114.					Sold (part)	11/06/23	J		
115.					Buy (add'l)	11/13/23	J		
116. (GSIMX)	B	Dividend	L	T	Buy	08/09/23	L		
117.					Buy (add'l)	08/10/23	J		
118.					Sold (part)	10/17/23	J		
119.					Sold (part)	11/13/23	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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.	05/15/2024

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. (IWF)	A	Dividend	M	T	Buy	08/09/23	M		
121.					Sold (part)	10/17/23	J		
122.					Sold (part)	11/06/23	J		
123.					Sold (part)	11/13/23	J	A	
124. (IWD)	C	Dividend	M	T	Buy	08/09/23	M		
125.					Buy (add'l)	10/17/23	J		
126.					Sold (part)	11/06/23	J		
127.					Buy (add'l)	11/13/23	J		
128. (GOVT)	B	Dividend	M	T	Buy	08/09/23	M		
129.					Buy (add'l)	10/17/23	J		
130.					Sold (part)	11/06/23	J		
131. (IDEV)	A	Dividend	L	T	Buy	08/09/23	L		
132.					Sold (part)	11/06/23	J		
133. (MEIIX)	D	Dividend	M	T	Buy	08/09/23	L		
134.					Buy (add'l)	08/10/23	K		
135.					Sold (part)	10/17/23	J		
136.					Sold (part)	11/06/23	J		

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

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. (OANIX)	B	Dividend	L	T	Buy	08/09/23	K		
138.					Buy (add'l)	08/10/23	J		
139.					Buy (add'l)	10/17/23	J		
140.					Sold (part)	11/06/23	J		
141. (PBDPX)	B	Dividend	M	T	Buy	08/09/23	L		
142.					Buy (add'l)	08/10/23	K		
143.					Sold (part)	11/06/23	J		
144. (VGLT)	A	Dividend	K	T	Buy	08/09/23	K		
145.					Buy (add'l)	10/17/23	J		
146.					Sold (part)	11/13/23	J		
147. (VCIT)	A	Dividend	L	T	Buy	08/09/23	L		
148.					Sold (part)	10/17/23	K		
149. (VMBS)	B	Dividend	L	T	Buy	08/09/23	L		
150.					Buy (add'l)	10/17/23	K		
151.					Sold (part)	11/06/23	J		
152. (VONG)	A	Dividend	L	T	Buy	08/09/23	L		
153.					Sold (part)	10/17/23	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
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.	05/15/2024

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.					Sold (part)	11/06/23	J		
155.					Sold (part)	11/13/23	J		
156. (BNDX)	A	Dividend	K	T	Buy	08/09/23	K		
157. (PCOXX) (cash eq.)	C	Dividend			Buy	02/01/23	M		
158.					Sold	07/19/23	M		
159. (CGGO)	A	Dividend			Buy	04/12/23	L		
160.					Buy (add'l)	05/15/23	L		
161.					Sold	08/09/23	M	D	
162. (JEPI)	D	Dividend			Sold	08/09/23	M	A	
163. (HEFA)	B	Dividend			Buy	06/09/23	M		
164.					Sold	08/09/23	M		
165. (VEA)	B	Dividend			Buy	05/15/23	M		
166.					Sold	08/09/23	M		
167. (VYMI)	B	Dividend			Buy	01/12/23	L		
168.					Buy (add'l)	02/23/23	K		
169.					Sold	08/09/23	L	B	
170. (VWILX)		None			Buy	06/09/23	M		

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.	05/15/2024

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.					Sold	08/09/23	M	B	
172. (CGDV)	A	Dividend			Buy	05/15/23	L		
173.					Sold	08/09/23	L	D	
174. (DODGX)	C	Dividend			Buy (add'l)	02/23/23	K		
175.					Buy (add'l)	03/14/23	K		
176.					Sold	08/09/23	N	D	
177. (OANMX)		None			Buy (add'l)	02/23/23	J		
178.					Sold	08/09/23	M	E	
179. (IWY)	A	Dividend			Buy	04/06/23	K		
180.					Buy (add'l)	06/02/23	K		
181.					Sold	08/09/23	L	D	
182. (HLIEX)	C	Dividend			Sold	05/15/23	N	D	
183. (NBPIX)		None			Sold (part)	06/09/23	L		
184.					Sold	08/09/23	M		
185. (PRILX)	A	Dividend			Buy (add'l)	02/23/23	K		
186.					Buy (add'l)	06/02/23	M		
187.					Sold	08/09/23	N	D	

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.	05/15/2024

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. (MRFOX)		None			Buy (add'l)	05/15/23	L		
189.					Sold (part)	06/02/23	M	E	
190.					Sold (part)	06/09/23	M	E	
191.					Sold	07/19/23	M	E	
192. (VIG)	B	Dividend			Sold	08/09/23	M	E	
193. (VHT)	A	Dividend			Sold	08/09/23	L	D	
194. (DHS)	B	Dividend			Sold	06/02/23	L		
195. (IJH)	A	Dividend			Sold	08/09/23	L	E	
196. (IEO)	A	Dividend			Sold	08/09/23	K	E	
197. (VO)	A	Dividend			Sold	08/09/23	L	E	
198. (IJT)	A	Dividend			Buy (add'l)	02/23/23	K		
199.					Sold	08/09/23	L	A	
200. (SPSM) (was SLY)	A	Dividend			Buy (add'l)	02/23/23	J		
201.					Sold	08/09/23	K	B	
202. (NEAR)	B	Dividend			Sold (part)	03/23/23	L		
203.					Sold	08/09/23	L		
204. (USFR)	C	Dividend			Sold	08/09/23	M	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.	05/15/2024

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. US TREASURY BILLS		None			Closed	08/09/23	N		
206. FREDDIE MAC BOND (3134GXFB5)	A	Interest			Redeemed	03/14/23	K	A	
207. (VTHRX)		None			Buy	06/12/23	N		
208.					Sold	08/09/23	N	C	
209. (FBETX)		None			Sold	06/09/23	M		
210. (AMEFX)	A	Dividend			Sold	06/02/23	L	A	
211. (MBXIX)		None			Sold (part)	01/12/23	L		
212.					Sold	02/01/23	M		
213. (VWENX)	A	Dividend			Buy (add'l)	02/23/23	K		
214.					Sold	06/09/23	M		
215. (EBSIX)		None			Buy	03/23/23	M		
216.					Sold	06/09/23	M	A	
217. ACCOUNT #4 (H)									
218. CHARLES SCHWAB BANK SWEEP (cash) (Y)									
219. (SWVXX) (cash eq.)	A	Dividend	J	T	Buy	03/24/23	J		
220.					Buy (add'l)	05/01/23	J		
221.					Buy (add'l)	05/22/23	J		

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

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

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)	
222.					Buy (add'l)	08/10/23	J		
223. (AVEM)	A	Dividend	J	T	Buy	03/24/23	J		
224.					Buy (add'l)	04/10/23	J		
225. (AVDE)	A	Dividend	K	T	Buy (add'l)	03/24/23	J		
226.					Sold (part)	04/10/23	J		
227.					Buy (add'l)	08/10/23	J		
228. (AVUV)	A	Dividend	J	T	Buy (add'l)	03/24/23	J		
229. (DFAU)	A	Dividend			Sold (part)	01/30/23	K		
230.					Sold	03/24/23	J		
231. (GEM)	A	Dividend	J	T	Buy	03/24/23	J		
232.					Buy (add'l)	04/10/23	J		
233. (GSIE)	A	Dividend	K	T	Buy (add'l)	03/24/23	J		
234.					Sold (part)	04/10/23	J		
235.					Buy (add'l)	08/10/23	J		
236. (HTRB)	A	Dividend	J	T	Buy	05/01/23	J		
237.					Buy (add'l)	08/10/23	J		
238. (IJR)	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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/15/2024

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
239. (JCPB)	A	Dividend	J	T	Buy	05/01/23	J		
240.					Buy (add'l)	08/10/23	J		
241. (JSCP)	A	Dividend	J	T	Sold (part)	05/01/23	K		
242.					Buy (add'l)	08/10/23	J		
243. (VIG) (X)	A	Dividend	J	T					
244. (VTI)	A	Dividend	K	T					
245. (FPNIX)	A	Dividend	K	T	Sold (part)	01/30/23	K		
246.					Sold (part)	05/01/23	J		
247. (GMOLX)	A	Dividend	J	T	Buy	09/07/23	K		
248. (GRIOX)	A	Dividend	J	T	Buy	05/01/23	J		
249. (MNCPX)	A	Dividend	J	T	Sold (part)	01/30/23	K		
250.					Sold (part)	04/13/23	J		
251.					Sold (part)	05/01/23	J		
252. (MWCIX)	B	Dividend			Sold (part)	04/10/23	J		
253.					Sold (part)	04/13/23	J		
254.					Sold (part)	05/01/23	J		
255.					Sold	09/07/23	K		

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

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

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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/15/2024

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
256. (GISYX)		None			Sold	01/30/23	J		
257. (EMVIX)		None			Sold	03/24/23	J		
258. (TRAIX)		None			Sold	01/30/23	J		
259. (TRGLX)		None			Sold (part)	01/30/23	J		
260.					Sold	03/24/23	J		
261. (VDIGX)	A	Dividend	K	T					
262. ACCOUNT #5 (H)									
263. ML BANK DEPOSIT PROGRAM (cash)	A	Interest	J	T					
264. SAFRA NATIONAL BANK (cash)	A	Interest			Closed	01/17/23	J		
265. (GFFFX)	B	Dividend	K	T					
266. (BIBDX)	A	Dividend	L	T					
267. (MACPX)	B	Dividend	L	T	Sold (part)	06/13/23	K		
268. (SGIIX)	C	Dividend	M	T					
269. (SPHD)	A	Dividend	J	T					
270. (QQQ)	A	Dividend	L	T					
271. (DGRO)	A	Dividend	J	T					
272. (VTI)	B	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
Jackson, Amy B.	05/15/2024

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
273. (VO)	A	Dividend	J	T					
274. ACCOUNT #6 (H)									
275. BANK OF AMERICA (cash)	A	Interest	M	T	Open	08/02/23	L		
276. (UTIXX) (cash eq.)	B	Dividend	J	T	Buy	08/09/23	L		
277.					Buy (add'l)	11/13/23	M		
278.					Sold (part)	12/19/23	K		
279.					Sold (part)	12/28/23	M		
280. RBC CASH PLUS (cash)	A	Interest			Closed	08/10/23	K		
281. FEDERAL FARM CREDIT BANKS BOND (3133EK4X1)	A	Interest			Buy	02/24/23	K		
282.					Redeemed	11/01/23	K		
283. US TREASURY NOTE	A	Interest	K	T	Open	03/08/23	K		
284. (AKRIX)	A	Dividend	K	T					
285. (CGGO)	A	Dividend	J	T	Buy	05/16/23	J		
286. (CGDV)	A	Dividend	J	T	Buy	05/16/23	J		
287. (IEO)	A	Dividend	K	T					
288. (IWM)	A	Dividend	K	T	Buy	05/11/23	J		
289. (HLIEX)	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

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/15/2024

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)	
290. (JEPQ)	C	Dividend	K	T	Buy	02/28/23	J		
291.					Buy (add'l)	05/09/23	J		
292.					Buy (add'l)	05/18/23	J		
293.					Buy (add'l)	06/05/23	J		
294. (JEPI)	D	Dividend	L	T					
295. (OANMX)	A	Dividend	K	T					
296. (PRILX)	B	Dividend	K	T					
297. (XLI)	A	Dividend	J	T	Buy	06/07/23	J		
298. (VB)	A	Dividend	J	T					
299. (VIG)	A	Dividend	K	T					
300. (VYMI)	A	Dividend	K	T	Buy	01/30/23	K		
301. (USFR)	C	Dividend	L	T	Buy (add'l)	03/07/23	K		
302. (DHS)	A	Dividend	K	T					
303. (MRFOX)		None			Sold	07/19/23	L	E	
304. (HNRIX)		None			Sold	08/04/23	K	D	
305. (COWZ)	A	Dividend			Sold	05/17/23	K		
306. (XOP)	A	Dividend			Sold	05/16/23	K	C	

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.	05/15/2024

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)	
307. (SLYV)	A	Dividend			Sold	05/11/23	J		
308. (FTSM)	A	Dividend			Sold	03/07/23	K	A	
309. US TREASURY BILL (Y)									
310. (BAR)		None			Buy	05/09/23	K		
311.					Sold	06/05/23	K		
312. (MBXIX)		None			Sold	01/30/23	L		
313. ACCOUNT #7 (H)									
314. BANK OF AMERICA (cash)	A	Interest	K	T	Open	09/13/23	K		

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

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.

Parenthetical numbers in Part VII are CUSIP numbers.

Name of Person Reporting	Date of Report
Jackson, Amy B.	05/15/2024

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/ 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. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544