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
Jarbou, Hala Y.	U.S. Distrct Court, Western District of Michigan	03/29/2023
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 Court Judge - Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
U.S. Courthouse 113 Federal Building 315 W. Allegan Street Lansing, MI 48933		

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.	1997	Defined Pension Plan - Healthcare Percentage Reimbursement (Oakland County, Michigan)
2.		
3.		

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

A. Filer's Non-Investment Income

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

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

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

(Dollar amount not required except for honoraria.)

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

	DATE	SOURCE AND TYPE
1.		
2.		
3.		
4.		

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

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

☐ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	FBA 3rd Annual Trial Advocacy Skills Workshop-34th Annual Bankruptcy Section Seminar	7/28/22-7/31/22	Mackinac Island, MI	Teaching & Seminar	Transportation, Meals, Lodging
2.					
3.					
4.					
5.					

Name of Person Reporting	Date of Report
Jarbou, Hala Y.	03/29/2023

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
Jarbou, Hala Y.	03/29/2023

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. Chase Bank Cash Accounts	A	Interest	N	T					
2. Huntington Bank Cash Accounts	A	Interest	M	T					
3. UBS Traditional IRA Account (H)									
4. - UBS Bank Cash and Money Balance	D	Interest	J	T					
5. - Ishares Russell 2000 ETF (IWM)	A	Dividend	K	T					
6. - Ishares Russell Midcap ETF (IWR)	A	Dividend	K	T					
7. - Ishares MSCI EAFE ETF (EFA)	A	Dividend	K	T					
8. - SPDR S&P 500 ETF TR (SPY)	B	Dividend	M	T					
9. AB Small Cap Growth Portfolio Fund Class Advisor (QUAYX)		None			Sold	11/14/22	J		
10. - Alger FDS Captl App FD Class Z (ACAZX)		None			Sold	06/23/22	L		
11. Allspring Special Small Cap Value Fund f/k/a Wells Fargo (ESPNX)	A	Dividend	K	T					
12. - Amer Funds New World Fund Class F2 (NFFX)	A	Dividend	K	T					
13. Columbia Overseas Value Fund Class Institutional (COSZX)	A	Dividend	K	T					
14. - John Hancock Disciplined Value Mid Cap Fund Class I (JVMIX)	A	Dividend	K	T					
15. - John Hancock Intl Growth Fund CL I (GOGIX)		None	K	T					
16. John Hancock Infrastructure Fund Class I (JEEIX)	A	Dividend	K	T					
17. JP Morgan Large Cap Growth Fund Class I (SEEGX)	A	Dividend	L	T	Buy	06/23/22	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		

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Jarbou, Hala Y.	03/29/2023

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18. - MFS Mid Cap Growth CL I (OTCIX)		None	K	T					
19. - MFS Value Fund Class I (MEIIX)	B	Dividend	L	T					
20. INVESCO Bulletshares 2024 Corporate Bond ETF (BSCO)	A	Dividend	K	T	Buy	11/14/22	K		
21. INVESCO Bulletshares 2023 Corporate Bond ETF (BSCN)	A	Dividend	K	T	Buy	11/14/22	K		
22. - Ishares Tips Bond ETF (TIP)	B	Dividend	K	T					
23. - Ishares IBonds Dec 2023 Term Treas ETF (IBTD)	A	Dividend	K	T	Buy	11/14/22	K		
24. Blackrock High Yield Bond Portfolioinstitutional (BHYIX)	B	Dividend			Sold	11/14/22	K		
25. - Blackrock Strategic Income Opportunities Portfolioinstitutio (BSIIX)	B	Dividend	K	T					
26. - Cohen & Steers Preferred Sec & Inc Fund I (CPXIX)	B	Dividend			Sold	11/14/22	K		
27. - Loomis Sayles Investment Grade Bond Class Y (LSIIX)	C	Dividend	L	T					
28. - Thornburg Strategic Income Class I (TSIIX)	B	Dividend			Sold	11/14/22	L		
29. UBS Roth IRA Account (H)									
30. - UBS Bank Cash and Money Balance	A	Interest	J	T					
31. - Invesco QQQ Trust ETF (QQQ)	A	Dividend			Sold	06/24/22	J		
32. - Ishares Russell 2000 ETF (IWM)	A	Dividend	J	T					
33. - Ishares Russell Midcap ETF (IWR)	A	Dividend	J	T					
34. - Ishares MSCI EAFE ETF (EFA)	A	Dividend	J	T					

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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35.	AB Small Cap Growth Portfolio Fund Class Advisor (QUAYX)		None			Sold	11/14/22	J		
36.	- SPDR S&P 500 ETF TR (SPY)	A	Dividend	K	T	Buy	11/14/22	J		
37.	- Alger FDS Captl App FD Class Z (ACAZX)		None			Sold	05/19/22	J		
38.	Allspring Special Small Cap Value Fund f/k/a Wells Fargo (ESPNX)	A	Dividend	J	T					
39.	- Amer Funds New World Fund Class F2 (NFFFX)	A	Dividend	J	T					
40.	- Columbia Overseas Value Fund Class Institutional (COSZX)	A	Dividend	J	T					
41.	- John Hancock Disciplined Value Mid Cap Fund Class (JVMIX)	A	Dividend	J	T					
42.	- John Hancock Intl Growth Fund CL I (GOGIX)		None	J	T					
43.	John Hancock Infrastructure Fund Class I (JEEIX)	A	Dividend	J	T					
44.	JP Morgan Large Cap Growth Fund Class I (SEEGX)	A	Dividend	K	T	Buy	06/24/22	J		
45.	- MFS Mid Cap Growth CL I (OTCIX)		None	J	T					
46.	- MFS Value Fund Class I (MEIIX)	A	Dividend	K	T					

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

RE: Part II, since I have more than 17 years combined service to Oakland County, when I retire I am eligible for 68% reimbursement of my health care costs.

Name of Person Reporting	Date of Report
Jarbou, Hala Y.	03/29/2023

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/ Hala Y. Jarbou

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
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