AO 10
Rev. 1/2021

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

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	03/12/2024
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 Court Judge - Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
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.	Federal Bar Association, Western District of Michigan Bankruptcy Section	7/26/23-7/29/23	Traverse City, MI	FBA 4th Annual Trial Advocacy Skills Workshop, 35th Annual Bankruptcy Section Seminar	Transportation, Meals, Lodging
2.					
3.					
4.					
5.					

Name of Person Reporting	Date of Report
Jarbou, Hala Y.	03/12/2024

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.	03/12/2024

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

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

	A. Description of Assets (including trust assets)	B. Income during reporting period		C. Gross value at end of reporting period		D. 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	L	T					
3.	UBS Traditional IRA Account (H)									
4.	- UBS Bank Cash and Money Balance	A	Interest	J	T					
5.	- Ishares Russell 2000 ETF (IWM)	A	Dividend			Sold	10/05/23	J	B	
6.	- Ishares Russell Midcap ETF (IWR)	A	Dividend			Sold	10/05/23	K	D	
7.	- Ishares MSCI EAFE ETF (EFA)	A	Dividend			Sold	10/05/23	K		
8.	- SPDR S&P 500 ETF TR (SPY)	B	Dividend			Sold	10/05/23	M	E	
9.	Vanguard Mid-Cap ETF (VO)	A	Dividend	K	T	Buy	10/05/23	K		
10.	Vanguard S&P 500 ETF (VOO)	A	Dividend	M	T	Buy	10/05/23	M		
11.	Vanguard Russell 2000 ETF (VTWO)	A	Dividend	K	T	Buy	10/05/23	K		
12.	Vanguard FTSE Developed Mkt ETF (VEA)	A	Dividend	K	T	Buy	10/05/23	K		
13.	Allspring Special Small Cap Value Fund f/k/a Wells Fargo (ESPNX)	A	Dividend	K	T	Buy (add'l)	10/05/23	J		
14.	- Amer Funds New World Fund Class F2 (NFFX)	B	Dividend	K	T	Sold (part)	10/05/23	J	B	
15.						Buy (add'l)	12/28/23	J		
16.	Columbia Overseas Value Fund Class Institutional (COSZX)	B	Dividend	K	T					
17.	Fidelity Advisor Intl Growth Fund CL I (FIIIX)	A	Dividend	K	T	Buy	10/05/23	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
Jarbou, Hala Y.	03/12/2024

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

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

	A. Description of Assets (including trust assets)	B. Income during reporting period		C. Gross value at end of reporting period		D. 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)	12/28/23	J		
19.	- John Hancock Disciplined Value Mid Cap Fund Class I (JVMIX)	B	Dividend	K	T	Buy (add'l)	10/05/23	J		
20.	- John Hancock Intl Growth Fund CL I (GOGIX)		None			Sold	10/05/23	K		
21.	John Hancock Infrastructure Fund Class I (JEEIX)	A	Dividend			Sold	10/05/23	K		
22.	JP Morgan Large Cap Growth Fund Class I (SEEGX)	A	Dividend	M	T	Sold (part)	10/05/23	J	B	
23.	- MFS Mid Cap Growth CL I (OTCIX)		None	K	T	Buy (add'l)	10/05/23	J		
24.						Buy (add'l)	12/28/23	J		
25.	- MFS Value Fund Class I (MEIIX)	D	Dividend	M	T	Buy (add'l)	10/05/23	J		
26.						Buy (add'l)	12/28/23	J		
27.	INVESCO Bulletshares 2024 Corporate Bond ETF (BSCO)	A	Dividend	K	T	Sold (part)	10/05/23	J	A	
28.	INVESCO Bulletshares 2023 Corporate Bond ETF (BSCN)	A	Dividend			Sold	10/05/23	K	A	
29.	INVESCO Bulletshares 2025 Corporate Bond ETF (BSCP)	A	Dividend	K	T	Buy	10/05/23	K		
30.	INVESCO Bulletshares 2027 Corporate Bond ETF (BSCR)	A	Dividend	K	T	Buy	10/05/23	K		
31.	INVESCO Bulletshares 2026 Corporate Bond ETF (BSCQ)	A	Dividend	K	T	Buy	03/22/23	K		
32.						Buy (add'l)	10/05/23	J		
33.	- Ishares 1-3 Yr Treasury Bond ETF (SHY)	A	Dividend	L	T	Buy	10/05/23	K		
34.	- Ishares Tips Bond ETF (TIP)		None			Sold	03/22/23	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
Jarbou, Hala Y.	03/12/2024

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (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)	D. (5) Identity of buyer/seller (if private transaction)
35. - Ishares IBonds Dec 2023 Term Treas ETF (IBTD)	B	Dividend			Sold	10/05/23	K	A	
36. - Blackrock Strategic Income Opportunities Portfolioinstitutio (BSIIX)	B	Dividend	K	T	Sold (part)	10/05/23	J		
37. - Loomis Sayles Investment Grade Bond Class Y (LSIIX)	C	Dividend	L	T	Sold (part)	10/05/23	J		
38. UBS Roth IRA Account (H)									
39. - UBS Bank Cash and Money Balance	A	Interest	J	T					
40. - Ishares Russell 2000 ETF (IWM)	A	Dividend			Sold	09/26/23	J	A	
41. - Ishares Russell Midcap ETF (IWR)	A	Dividend			Sold	09/26/23	J	A	
42. - Ishares MSCI EAFE ETF (EFA)	A	Dividend			Sold	09/26/23	J		
43. - SPDR S&P 500 ETF TR (SPY)	A	Dividend			Sold	09/26/23	K	C	
44. Vanguard Mid-Cap ETF (VO)	A	Dividend	J	T	Buy	09/26/23	J		
45. Vanguard S&P 500 ETF (VOO)	A	Dividend	K	T	Buy	09/26/23	K		
46. Vanguard Russell 200 ETF (VTWO)	A	Dividend	J	T	Buy	09/26/23	J		
47. Vanguard FTSE Developed Mkt ETF (VEA)	A	Dividend	J	T	Buy	09/26/23	J		
48. Allspring Special Small Cap Value Fund f/k/a Wells Fargo (ESPNX)	A	Dividend	J	T	Sold (part)	09/26/23	J	A	
49. - Amer Funds New World Fund Class F2 (NFFFX)	A	Dividend	J	T					
50. - Columbia Overseas Value Fund Class Institutional (COSZX)	A	Dividend	J	T					
51. Fidelity Advisor Intl Growth (FIIIX)	A	Dividend	J	T	Buy	09/26/23	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
Jarbou, Hala Y.	03/12/2024

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (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)	D. (5) Identity of buyer/seller (if private transaction)
52. - John Hancock Disciplined Value Mid Cap Fund Class (JVMIX)	A	Dividend	J	T					
53. - John Hancock Intl Growth Fund CL I (GOGIX)		None			Sold	09/26/23	J		
54. John Hancock Infrastructure Fund Class I (JEEIX)	A	Dividend			Sold	09/26/23	J		
55. JP Morgan Large Cap Growth Fund Class I (SEEGX)	A	Dividend	K	T					
56. - MFS Mid Cap Growth CL I (OTCIX)		None	J	T					
57. - MFS Value Fund Class I (MEIIX)	B	Dividend	K	T	Buy (add'l)	12/27/23	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
Jarbou, Hala Y.	03/12/2024

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.	03/12/2024

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. § 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
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544