AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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
Jones, Edith H.	5th Circuit Court of Appeals	04/23/2024
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**
Circuit Judge, Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
12505 U.S. Courthouse 515 Rusk Houston, TX 77002-2600		

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.	President	Garland Walker Inn of Court
2.	Board Member	Calvin Coolidge Presidential Foundation
3.	Trustee	Trust#1
4.	Trustee	Trust #2
5.	Trustee	Trust #3
6.	Secretary-Treasurer	[redacted] LLC

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.	2022	Prudential Ins. Co., Pension Annuity, Occidental Petrol
2.	2022	Hunton AK Plan A retirement plan-(All assets were sold/transferred to another account on or about 1/20/22) See Note to Part VII
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.	Federalist Society Reagan Library Conference	1/28-30/22	Simi Valley, CA	Panel Member	Airfare, Ground Transportation, Meals
2.	Federalist Society-Stanford University	2/10-11/22	Palo Alto, CA	Speech	Airfare, Lodging, Ground Transportation, Meals
3.	Coolidge Foundation Scholarship Selection Jury	4/29-5/1/22	Plymouth Notch, VT	Participant	Hotel, Meals
4.	George Mason University Antonin Scalia Law School Foundations of the Rule of Law	7/24-31/22	London, England	Attendee	Partial Transportation, Hotel, Meals

5.	Claremont Institute-John Marshall Fellowship	8/15-17/22	Newport Beach, CA	Panel Member	Airfare, Hotel, Meals
6.	Federalist Society-Texas Annual Chapter Conference	9/23-24/22	Austin, TX	Panel Member	Meal, Hotel, Travel
7.	Heritage Foundation-Joseph Story Lecture	10/25/22	Washington, DC	Speaker	Lodging, Meal
8.	Federalist Society 2022 National Lawyers Conference	11/9-12/22	Washington, DC	Moderator	Airfare, Lodging, Meals, Ground Transportation
9.	Federal Bar Association Annual Conference-Hawaii Chapter	11/29-12/2/22	Honolulu, HI	Fed. Bar Ass'n. Panelist	Airfare, Lodging, Ground Transportation, Meals

Name of Person Reporting	Date of Report
Jones, Edith H.	06/14/2023

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.	Andrew Wisch	Astros Tickets/one playoff game.	$250.00
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
Jones, Edith H.	06/14/2023

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.	BANK ACCOUNTS									
2.	Bank of America - Accounts	A	Interest	L	T					
3.	J.P. Morgan Chase Bank - Accounts	A	Interest	K	T					
4.	Morgan Stanley Bank	B	Interest	O	T					
5.	STOCKS, BONDS & NOTES									
6.	AT&T Common Stock	A	Dividend	J	T	Sold (part)	09/14/22	J	A	
7.	Invesco Comstock A (ACSTX) (fmr. Invest. Co. of America)	B	Dividend	L	T					
8.	Dowdupont - common	A	Dividend	J	T					
9.	Nestle - common	B	Dividend	J	T	Sold (part)	01/18/22	L	D	
10.	Newmont Gold - common	A	Dividend	J	T					
11.	Intel Corporation	A	Dividend	J	T	Sold (part)	01/18/22	K	C	
12.	Procter & Gamble	B	Dividend	K	T	Sold (part)	01/18/22	M	D	
13.	Tortoise Energy Corp.	A	Dividend	J	T					
14.	Pepsico	B	Dividend	L	T	Sold (part)	01/18/22	K	D	
15.	NCR		None	J	T					
16.	MS Global Infrastructure A, (MTIPX)	A	Dividend	K	T					
17.	Am. Inv. Co. (AIVSX)	B	Dividend	L	T	Sold (part)	01/18/22	J	B	

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
Jones, Edith H.	06/14/2023

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. Franklin Insd. Tax Free Fund-FKTIX	B	Interest	K	T					
19. Franklin Mut. Shares Fund TESIX	A	Dividend	J	T					
20. Magellan Midstream Partners	B	Dividend	K	T					
21. Verizon Comm	A	Dividend	J	T					
22. Fidelity Fund (FFFCX)*See Note to Part VII		None			Sold	01/20/22	N	F	
23. Smucker J M Co		None			Sold	01/18/22	J	B	
24. Lord Abbett Sht. Fund (LALDX)	C	Dividend	M	T					
25. Pioneer Mlti Ast Ult. (MAFRX)	C	Dividend	L	T	Sold (part)	01/18/22	K	C	
26. Templeton Global Bond FdA (TPINX)	A	Dividend	L	T					
27. Goldman Sachs MLP Inc. (GER)		None			Sold	01/18/22	J	A	
28. Tekla Healthcare Opp Fund (THQ)	A	Dividend	K	T					
29. AmCap Fund (AMCPX)	B	Dividend	L	T					
30. Fidelity Puritan Trust (FPURX)	A	Dividend	J	T					
31. Fidelity Sec's Fd. (FBGRX)	A	Dividend	J	T					
32. Columbia Funds (AUGAX)	A	Dividend	J	T					
33. Wash. Mut. Inv's Fund (AWSHX)	A	Dividend	L	T	Sold (part)	09/14/22	L	A	
34. First Tr. En. Income	A	Dividend	J	T					

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35. USAA Cornerstone (USCRX)	C	Dividend	K	T					
36. Vanguard stock Market Index Fund (VTSAX)	B	Dividend	M	T					
37. Colgate Palmolive	A	Dividend			Sold	09/14/22	J	B	
38. - [redacted] LLC, [redacted]	A	Rent	N	W					
39. Alphabet Inc.	B	Dividend	L	T	Sold (part)	01/18/22	J	C	
40. Blackstone Group	B	Dividend	K	T	Sold (part)	01/18/22	J	B	
41. Enterprise Prod. Ptnrs LP	A	Dividend	K	T					
42. Rio Tinto PLC	A	Dividend	K	T					
43. Visa, Inc.	B	Dividend	K	T	Sold (part)	01/18/22	K	C	
44. Walgreen Boots		None			Sold	01/18/22	J	A	
45. Corteva	A	Dividend	J	T					
46. Walmart	A	Dividend	K	T	Sold (part)	01/18/22	J	B	
47. Accenture	A	Dividend	J	T	Sold (part)	01/18/22	J	A	
48. Walt Disney	A	Dividend	J	T					
49. United Health Gp. *See Note Part VII	A	Dividend	K	T	Redeemed	10/17/22	K	A	
50. Permanent Porfolio	A	Dividend	L	T					
51. Apple, Inc.	A	Interest	L	T					

1. Income Gain Codes: (See Columns B1 and D4)
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52. Microsoft	A	Interest	L	T					
53. JP Morgan Chase Bond	A	Interest			Redeemed	10/24/22	K	A	
54. Trust #1									
55. -Invesco Comstock A (ACSTX)	A	Dividend	K	T					
56. -Magellan Midstream Partners	A	Dividend	K	T					
57. -Morgan Stanley Bank	A	Interest	K	T					
58. -Toyota Motor Bond	A	Interest			Redeemed	09/08/22	K	A	
59. Trust #2									
60. -Bank of America	A	Dividend	J	T					
61. -Coca Cola	A	Dividend	J	T					
62. -Eastman Chem	A	Dividend	J	T					
63. -Morgan Stanley Bank	A	Interest	K	T					
64. -Wabtec	A	Dividend	J	T					
65. -Toyota Motor Bond	A	Interest			Redeemed	09/08/22	K	A	
66. Trust #3									
67. -American Elec Power	A	Dividend	J	T					
68. -Chemours Co.	A	Dividend	J	T					

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69. -Dow Dupont	A	Dividend	J	T					
70. -Emerson Elec Co.	A	Dividend	J	T					
71. -Hershey Co.	A	Dividend	J	T					
72. -Dominion Energy	A	Dividend	J	T					
73. -Morgan Stanley Bank	A	Interest	K	T					
74. -Corteva	A	Dividend	J	T					
75. -Toyota Motor Bond	A	Interest			Redeemed	09/08/22	K	A	

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

Section VII. Investments and Trusts

* Non-Investment Income & line 22. Assets in Hunton AK Plan A were sold and proceeds transferred to another account.

*Line 49. In 2021 disclosure statement, I combined a bond and stock in United Health Group. Bond was redeemed, but I continue to own stock.

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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/ Edith H. Jones

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
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One Columbus Circle, N.E.
Washington, D.C. 20544