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
Jones, Edith H.	5th Circuit Court of Appeals	07/29/2024
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	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
12505 U.S. Courthouse 515 Rusk Street 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
7.		
8.		
9.		
10.		
11.		

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.	2/28/2023	Hillsdale College Teaching	$6,000.00
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	Prudential Ins. Co., Pension Annuity, Occidental Petrol
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.	Federalist Society - NY	01/18-19/23	New York City, NY	Speech	Airfare, Lodging, Ground Transportation, Meals
2.	Hillsdale College - MI	02/3-5/23	Hillsadle, MI	Teaching Grad Seminar	Airfare, Lodging, Ground Transportation, Meals
3.	Hillsdale College - MI	02/17-19/23	Hillsdale, MI	Teaching Grad Seminar	Airfare, Lodging, Ground Transportation, Meals
4.	Federalist Society - TX	03/3-4/23	Austin, TX	Moderator Federalist Society Panel	Lodging, Ground Transportation, Meals

5.	Federalist Society - OH	04/20-21/23	Columbus, OH	Speech to Federalist Society	Airfare, Lodging, Ground Transportation, Meals
6.	Coolidge Foundation Scholarship Selections - VT	05/21-24/23	Woodstock, VT	Participate in Scholarship Selections	Lodging and some Meals
7.	Federalist Society - DC	11/8-11/23	Washington, DC	Moderate Panel, Federalist Society Conference	Airfare, Lodging, Ground Transportation, Meals
8.					
9.					
10.					
11.					

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.	07/29/2024

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.	BANK ACCOUNTS									
2.	Bank of America - Accounts	A	Interest	L	T					
3.	J.P. Morgan Chase Bank - Accounts	A	Interest	J	T					
4.	Morgan Stanley Bank	B	Interest	K	T					
5.	STOCKS, BONDS, & NOTES									
6.	AT&T Common Stock	A	Dividend	J	T					
7.	Invesco Comstock A (ACSTX) (fmr. Invest. Co. of America)	B	Dividend	L	T					
8.	Dowdupont - common	A	Dividend	J	T					
9.	Nestle - common	A	Dividend	J	T					
10.	Newmont Gold - common	A	Dividend	J	T					
11.	Intel Corporation		None			Sold	06/23/23	J	A	
12.	Proctor & Gamble	A	Dividend	J	T					
13.	Tortoise Energy Corp.		None			Sold	06/23/23	J	A	
14.	Pepsico	A	Dividend	K	T					
15.	NCR		None	J	T					
16.	MS Global Infrastracture A, (MTIPX)	A	Dividend	K	T					
17.	Am. Inv. Co. (AIVSX)	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
Jones, Edith H.	07/29/2024

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. Franklin Insd. Tax Free Fund-FKTIX	B	Interest	K	T					
19. Franklin Mut. Shares Fund TESIX	A	Dividend	J	T					
20. Magellan Midstream Partners** See Note Part VII	B	Dividend	K	T					
21. Verizon Comm	A	Dividend	J	T					
22. Lord Abbett Sht. Fund (LALDX)	D	Dividend	M	T					
23. Pioneer Mlti Ast Ult (MAFRX)	D	Dividend	L	T					
24. Templeton Global Bond Fds (TPINX)		None			Sold	06/23/23	J	A	
25. Tekla Healthcare Opp Fund (THQ)* See Note Part VII	A	Dividend	K	T					
26. AmCap Fund (AMCPX)	B	Dividend	M	T					
27. Fidelity Purtian Trust (FPURX)	A	Dividend	J	T					
28. Fidelity Sec's Fd. (FBGRX)	A	Dividend	K	T					
29. Columbia Funds (AUGAX)	A	Dividend	J	T					
30. Wah. Mut. Inv's Fund (AWSHX)	C	Dividend	L	T					
31. First Tr. En Income	A	Dividend	J	T					
32. USA Cornerstone (USCRX)	C	Dividend	K	T					
33. Vanguard Stock Market Index Fund (VTSAX)	C	Dividend	M	T					
34. -[redacted] LLC, property in [redacted]	A	Rent	N	W					

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Jones, Edith H.	07/29/2024

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35. Alphabet Inc.	A	Dividend	L	T					
36. Blackstone Group	B	Dividend	K	T					
37. Enterprise Prod. Ptnrs LP	B	Dividend	K	T					
38. Rio Tinto PLC	B	Dividend	K	T					
39. Visa, Inc.	A	Dividend	K	T					
40. Corteva	A	Dividend	J	T					
41. Walmart	A	Dividend	K	T					
42. Accenture	B	Dividend	K	T					
43. Walt Disney		None			Sold	06/23/23	J	A	
44. United Health Gp.	A	Dividend	K	T					
45. Permanent Portfolio (PRPHX)	A	Dividend	L	T					
46. Apple, Inc.	A	Interest			Redeemed		L	A	
47. Microsoft	A	Interest			Redeemed	12/15/23	L	A	
48. Astrazeneca	A	Dividend	K	T	Buy	06/22/23	K		
49. BHP Grp.	B	Dividend	L	T	Buy	06/22/23	L		
50. ConocoPhillips	B	Dividend	L	T	Buy	06/22/23	L		
51. Glencore	B	Dividend	L	T	Buy	06/22/23	L		

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52.	Eli Lilly	A	Dividend	L	T	Buy	06/22/23	L		
53.	Marathon Petroleum	B	Dividend	L	T	Buy	06/22/23	L		
54.	Novo Nordisk	A	Dividend	L	T	Buy	06/22/23	L		
55.	MSILF Treas. Sec's (MSUXX)	E	Dividend	N	T	Buy	06/22/23	N		
56.	TRUST #1									
57.	Accenture	A	Dividend	J	T	Buy	06/21/23	J		
58.	Astrazeneca	A	Dividend	J	T	Buy	06/21/23	J		
59.	BHP Grp.	A	Dividend	J	T	Buy	06/21/23	J		
60.	Marathon Petroleum	A	Dividend	J	T	Buy	06/21/23	J		
61.	MSILF Treas. Sec's (MSUXX)	A	Dividend	K	T	Buy	06/22/23	K		
62.	-Invesco Comstock A (ACSTX)	B	Dividend	K	T					
63.	-Magellan Midstream Partners** See Note Part VII	A	Dividend	K	T					
64.	-Morgan Stanley Bank	A	Interest	J	T					
65.	TRUST #2									
66.	Accenture	A	Dividend	J	T	Buy	06/21/23	J		
67.	Astrazeneca	A	Dividend	J	T	Buy	06/21/23	J		
68.	BHP Grp.	A	Dividend	J	T	Buy	06/21/23	J		

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69.	Marathon Petroleum	A	Dividend	J	T	Buy	06/21/23	J		
70.	MSILF Treas. Sec's (MSUXX)	A	Dividend	K	T	Buy	06/22/23	K		
71.	-Bank of America		None			Sold	06/23/23	J	A	
72.	-Coca Cola	A	Dividend	J	T					
73.	-Eastman Chem	A	Dividend	J	T					
74.	-Morgan Stanley Bank	A	Interest	J	T					
75.	-Wabtec	A	Dividend	J	T					
76.	TRUST #3									
77.	Accenture	A	Dividend	J	T	Buy	06/21/23	J		
78.	Astrazeneca	A	Dividend	J	T	Buy	06/21/23	J		
79.	BHP Grp.	A	Dividend	J	T	Buy	06/21/23	J		
80.	Marathon Petroleum	A	Dividend	J	T	Buy	06/21/23	J		
81.	MSILF Treas. Sec's (MSUXX)	A	Dividend	K	T	Buy	06/22/23	K		
82.	-American Elec Power	A	Dividend	J	T					
83.	-Chemours Co.		None			Sold	06/23/23	J	A	
84.	-Diw /dyoibt	A	Dividend	J	T					
85.	-Emerson Elec Co.	A	Dividend	J	T					

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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
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86. -Hershey Co.	A	Dividend	J	T					
87. -Dominion Energy	A	Dividend	J	T					
88. -Morgan Stanley Bank	A	Interest	J	T					
89. -Corteva	A	Dividend	J	T					

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Jones, Edith H.	07/29/2024

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

Section VII. Investments and Trusts

*Tekla Healthcare Opp. Fund now titled Aberdeen (ABRDN) HLTC Opportunities
**Oneck acquired Magellan efective 9/25/23.
Stock exchange.

Name of Person Reporting	Date of Report
Jones, Edith H.	07/29/2024

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/ 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
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544