AO 10
Rev. 1/2021

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2021

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
Jones, Steve C.	United States District Court, Northern District of Georgia	05/22/2022
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**
United States District Court Judge-Active Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
1967 United States Courthouse 75 Ted Turner Drive, S.W. Atlanta, Georgia 30303-3309		

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.	Board Member	University of Georgia Athletic Association Board
2.	Trustee	University of Georgia Foundation
3.	Board Member	Russell Foundation
4.	Advisory Board Member	UGA Hall of Fame Chapter, National Football Foundation
5.	Trustee	Young Harris College

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions)*

☐ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.	1995	Steve C. Jones & Georgia Judicial Retirement System Pension upon age 60 and minimum of 10 years of service.
2.	1978	Steve C. Jones & Unified Government of Athens-Clarke County, Georgia Pension upon retirement at age 62 with eligibility for receipt of early benefits at age 56.
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.	2021	Unified Government of Athens-Clarke County, Ga., fixed benefits from vested pension plan.	$11,791.00
2.	2021	Georgia Judicial Retirement System	$89,081.00
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.	2021	Self-Employed Seamstress
2.	2021	Clarke County School District (Retirement Compensation)
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.					
2.					
3.					
4.					
5.					

V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*

☐ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.	[redacted] of [redacted]	Gift to [redacted]	$4,800.00
2.	UGA Athletic Association	Football Tickets	$1,050.00
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.	Wells Fargo	Mortgage on Rental Property #1 (Athens, Ga., part VII, Line 1)	L
2.	Wells Fargo	Mortgage on Property #2 (Athens, Ga., part VII, Line 2)	K
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Jones, Steve C.	05/22/2022

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. Rental Property #1, Athens, Ga.	D	Rent	M	W					
2. Rental Property #2, Athens, Ga.	D	Rent	M	W					
3. Rental Property #3, Athens, Ga.	B	Rent	L	W					
4. Rental Property #4, Athens, Ga.	D	Rent	L	W					
5. Rental Property #5, Athens, Ga.	D	Rent	M	W					
6. Rental Property #6, Athens, Ga.	D	Rent	M	W					
7. Truist	A	Interest	K	W					
8. IRA #!									
9. Valic Fixed Account Plus	A	Interest			Closed	07/07/21	K		
10. Short Term Fund	B	Interest			Closed	07/07/21	N		
11. Clarke Co. Bd. of Ed. 457 Plan-100% Fixed Account Plus.	B	Interest	M	T					
12. Voya Financial	B	Interest	L	T					
13. Invesco American Franchise Fund Class C	A	Interest	J	T					
14. Ishares TR 20 YR BD ETF	A	Dividend	K	T	Buy	07/12/21	K		
15. Ishares Russell Mid-Cap Value ETF	A	Dividend	J	T	Buy	07/12/21	J		
16. Ishares Trust 1-3 Year Treasury Bond ETF	A	Dividend	J	T	Buy	07/12/21	J		
17. Ishares MSCI EAFE ETF	A	Dividend	J	T	Buy	07/12/21	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		

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18. Ishares TR RUS MD CP GR ETF	A	Dividend	J	T	Buy	07/12/21	J		
19. Ishares Russell 1000 Value ETF	A	Dividend	K	T	Buy	07/12/21	K		
20. Ishares TR US TREAS BD ETF	A	Dividend	J	T	Buy	07/12/21	J		
21. Ishares TR FLTG Rate NT ETF	A	Dividend	J	T	Buy	07/12/21	J		
22. SPDR GOLD TR SHS		None	J	T	Buy	07/12/21	J		
23. Ishares TR RUS 1000 GRW ETF	A	Dividend	K	T	Buy	07/12/21	K		
24. SPDR MSCI ACWI EX US ETF	A	Dividend	J	T	Buy	07/12/21	J		
25. SPDR PORTFOLIO SHORT TERM TREASURY ETF	A	Dividend	K	T	Buy	07/12/21	K		
26. Vanguard SPECIALIZED FUNDS DIV APP ETF	A	Dividend	J	T	Buy	07/12/21	J		
27. Vanguard INTL EQUALITY INDEX FDS FTSE EUROPE ETF	A	Dividend	J	T	Buy	07/12/21	J		
28. Vanguard MEGA CAP GROWTH INDEX FUND	A	Dividend	J	T	Buy	07/12/21	J		
29. Vanguard INTL EQUALITY INDEX FDS FTSE EMR MKT ETF	A	Dividend	J	T	Buy	07/12/21	J		
30. Vanguard SCOTTDALE FDS INTER TERM TREAS	A	Dividend	J	T	Buy	07/12/21	J		
31. Vanguard REAL ESTATE ETF	A	Dividend	J	T	Buy	07/12/21	J		
32. Ishares TR 20 YR BD ETF		None	J	T	Buy (add'l)	07/12/21	J		
33. Ishares TRUST 1-3 YEAR TREASURY BOND ETF		None	J	T	Buy (add'l)	08/13/21	J		
34. Ishares TR RUS 1000 GRW ETF		None	J	T	Buy (add'l)	08/13/21	J		

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35. Ishares MSCI EAFE ETF		None	J	T	Buy (add'l)	08/13/21	J		
36. Ishares TR US TREAS BD ETF		None	J	T	Buy (add'l)	08/13/21	J		
37. Ishares TR RUS MD CP GR ETF		None	J	T	Buy (add'l)	08/13/21	J		
38. Ishares TR FLTG RATE NT ETF		None	J	T	Buy (add'l)	08/13/21	J		
39. Vanguard MEGA CAP GROWTH INDEX FUND		None	J	T	Buy (add'l)	08/13/21	J		
40. SPDR GOLD TR GOLD SHS		None	J	T	Buy (add'l)	08/13/21	J		
41. SPDR PORTFOLIO SHORT TERM TREASURY ETF		None	J	T	Buy (add'l)	08/13/21	J		
42. Vanguard SCOTTSDALE FDS INTER TERM TREAS		None	J	T	Buy (add'l)	08/13/21	J		
43. Vanguard REAL ESTATE ETF		None	J	T	Buy (add'l)	08/13/21	J		
44. Vanguard INT EQUALITY INDEX FDS FTSE EUROPE ETF		None	J	T	Buy (add'l)	08/13/21	J		
45. Vanguard INTL EQUALITY INDEX FDS FTSE EMR MKT ETF		None	J	T	Buy (add'l)	08/13/21	J		
46. AMERICAN WATER WORKS COMPANY INC	A	Dividend	J	T	Buy	07/12/21	J		
47. SBA COMMUNICATIONS CORP NEW CL A	A	Dividend	J	T	Buy	07/12/21	J		
48. MONOLITHIC POWER SYSTEMS INC	A	Dividend	J	T	Buy	07/12/21	J		
49. COINBASE GLOBAL INC COM CL A		None	J	T	Buy	07/12/21	J		
50. TETRA TECH INC	A	Dividend	J	T	Buy	07/12/21	J		
51. BRUKER CORP	A	Dividend	J	T	Buy	07/12/21	J		

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52. HEXCEL CORP		None	J	T	Buy	07/12/21	J		
53. SVB FINANCIAL GROUP COM		None	J	T	Buy	07/12/21	J		
54. TOPBUILD CORP COM		None	J	T	Buy	07/12/21	J		
55. MSCI INC	A	Dividend	J	T	Buy	07/12/21	J		
56. MAXIMUS INC	A	Dividend	J	T	Buy	07/12/21	J		
57. KONINKLIJKE PHILLIPS N V NY REGIS SHS NEW		None	J	T	Buy	07/12/21	J		
58. APPLE INC	A	Dividend	J	T	Buy	07/12/21	J		
59. ROCKWELL AUTOMATION INC COM USD1	A	Dividend	J	T	Buy	07/12/21	J		
60. SQUARE INC CL A		None	J	T	Buy	07/12/21	J		
61. TE CONNECTIVITY LTD	A	Dividend	J	T	Buy	07/12/21	J		
62. CIENA CORP		None	J	T	Buy	07/12/21	J		
63. LUMENTUM HLDGS INC COM		None	J	T	Buy	07/12/21	J		
64. TREX COMPANY INC		None	J	T	Buy	07/12/21	J		
65. STERIS PLC ORD USDO 001	A	Dividend	J	T	Buy	07/12/21	J		
66. DANAHER CORP COM	A	Dividend	J	T	Buy	07/12/21	J		
67. PAYPAL HLDGS INC COM	A	Dividend	J	T	Buy	07/12/21	J		
68. FLEX LTD COM USDO.01		None	J	T	Buy	07/12/21	J		

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69. AFLAC INC COM USDO.01	A	Dividend	J	T	Buy	07/12/21	J		
70. VESTA WIND SYS AS UNSP ADR		None	J	T	Buy	07/12/21	J		
71. ZENDESK INC COM USDO.01		None	J	T	Buy	07/12/21	J		
72. BIO RAD LABORATORIES INC		None	J	T	Buy	07/12/21	J		
73. NVIDIA CORP COM	A	Dividend	J	T	Buy	07/12/21	J		
74. INTERCONTINENTAL EXCHANGE INC COM	A	Dividend	J	T	Buy	07/12/21	J		
75. ANSYS INC COM USDO		None	J	T	Buy	07/12/21	J		
76. CREE INC COM USDO		None	J	T	Buy	07/12/21	J		
77. LABORATORY CORP AMER HLDGS COM		None	J	T	Buy	07/12/21	J		
78. XYLEM INC USDO	A	Dividend	J	T	Buy	07/12/21	J		
79. WASTE MANAGEMENT INC	A	Dividend	J	T	Buy	07/12/21	J		
80. TWILIO INC CL A		None	J	T	Buy	07/12/21	J		
81. KEYSIGHT TECHNOLOGIES INC COM USDO.01 WD		None	J	T	Buy	07/12/21	J		
82. NIKE INC CLASS B COM NPV	A	Dividend	J	T	Buy	07/12/21	J		
83. ALCON INC		None	J	T	Buy	07/12/21	J		
84. NEXTERA ENERGY INC COM USDO.01	A	Dividend	J	T	Buy	07/12/21	J		
85. MOTOROLA SOLUTIONS COM NEW	A	Dividend	J	T	Buy	07/12/21	J		

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86. ADOBE SYSTEMS INCOPORATED COM		None	J	T	Buy	07/12/21	J		
87. APTIV COM USDO.01		None	J	T	Buy	07/12/21	J		
88. NXP SEMICONDUCTORS N V	A	Dividend	J	T	Buy	07/12/21	J		
89. PROCTER AND GAMBLE CO COM	A	Dividend	J	T	Buy	07/12/21	J		
90. MICROSOFT CORP	A	Dividend	J	T	Buy	07/12/21	J		
91. HOME DEPOT INC	A	Dividend	J	T	Buy	07/12/21	J		
92. UNITEDHEALTH GROUP INC	A	Dividend	J	T	Buy	07/12/21	J		
93. VISA INC	A	Dividend	J	T	Buy	07/12/21	J		
94. APTIV PLC COM USDO.01		None			Sold	09/10/21	J		
95. NVIDIA CORP COM		None			Sold	09/10/21	J	A	
96. DEERE & CO	A	Dividend	J	T	Buy	09/13/21	J		
97. BECTON DICKINSON & CO COM USD1.00	A	Dividend	J	T	Buy	09/13/21	J		
98. LABORATORY CORP AMER HLDGS COM		None			Sold	09/13/21	J	A	
99. XYLEM INC COM USDO.01		None			Sold	09/14/21	J	A	
100. BIO RAD LABORATORIES INC		None			Sold	09/14/21	J	A	
101. ZENDESK INC COM USDO		None			Sold	09/16/21	J		
102. PAYPAL HLDGS INC COM		None			Sold	11/10/21	J	B	

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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)
103. BECTON DICKINSON & CO COM USD1.00		None	J	T	Buy (add'l)	11/22/21	J		
104. NIKE INC CLASS B COM NPV		None			Sold	11/22/21	J	A	
105. IRA #2									
106. PIMCO INCOME FUND CLC	A	Interest			Sold	04/14/21	K	E	
107. IVY BALANCE CLASS C		None			Sold	04/14/21	K	D	
108. J.P.MORGAN INCOME BUILDER FUND CLASS C	A	Dividend			Sold	04/14/21	K	C	
109. AMERICAN CAPITAL INCOME BUILDER CLC	A	Dividend			Sold	04/14/21	K	D	
110. FRANKLIN RISING DIVIDENDS CLC	A	Dividend			Sold	04/14/21	J	D	
111. FIDELITY ADVISOR NEW SIGHTS CLC		None			Sold	04/14/21	K	E	
112. INVESCO CONVERTIBLE SECURITIES	A	Dividend			Sold	04/14/21	L	E	
113. COMMERCIAL BANK-CD	A	Interest	J	T					
114. SYNOVUS		None	K	T					
115. IRA #3									
116. SYNOVUS BANK DEPOSIT SWEEP	A	Interest	J	T					
117. VANGUARD BD INDEX INC, LONG TERM BD	A	Dividend			Sold	04/14/21	J	A	
118. VANGUARD BD INDEX INTERMEDIATE	A	Dividend			Sold	04/14/21	J	A	
119. VANGUARD BD INDEX -SHORT TERM BD	A	Dividend			Sold	04/14/21	J	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		
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Name of Person Reporting	Date of Report
Jones, Steve C.	05/22/2022

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

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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)
120. VANGUARD FTSE DEVELOPED MARKET ETF	A	Dividend			Sold	04/14/21	K	A	
121. VANGUARD CHARLOTTE TOTAL INTL BD INDEX	A	Dividend			Sold	04/14/21	J	A	
122. VANGUARD INTL EQUALITY INDEX FUND INC FTSE	A	Dividend			Sold	04/14/21	J	A	
123. VANGUARD SCOTTSDALE FDS	A	Dividend			Sold	04/14/21	J	A	
124. VANGUARD INDEX FDS VANGUARD GROWTH	A	Dividend			Sold	04/14/21	K	D	
125. VANGUARD INDEX FDS VANGUARD GROWTH ET	A	Dividend			Sold	04/14/21	J	C	
126. VANGUARD SMALL-CAP INDEX FUND	A	Dividend			Sold	04/14/21	J	B	
127. LINDE PLC COM EURO	A	Dividend	J	T	Buy	04/14/21	J		
128. GARMIN LTD COM	A	Dividend	J	T	Buy	04/14/21	J		
129. ABBOTT LAB	A	Dividend	J	T	Buy	04/14/21	J		
130. ADOBE SYSTEMS		None	J	T	Buy	04/14/21	J		
131. ADVANCED MICRO DEVICE		None	J	T	Buy	04/14/21	J		
132. ALPHABET INC CAP		None	J	T	Buy	04/14/21	J		
133. AMAZON COM INC		None	J	T	Buy	04/14/21	J		
134. AMERICAN TOWER CORP.	A	Dividend	J	T	Buy	04/14/21	J		
135. APPLE INC.	A	Dividend	K	T	Buy	04/14/21	K		
136. APPLIED MATERIALS	A	Dividend	J	T	Buy	04/14/21	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
Jones, Steve C.	05/22/2022

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

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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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137. ASTRAZENECA ADR	A	Dividend	J	T	Buy	04/14/21	J		
138. BAKER HUGHES COM	A	Dividend	J	T	Buy	04/14/21	J		
139. BK OF AMERICA CORP. COM	A	Dividend	J	T	Buy	04/14/21	J		
140. BLACKROCK INC COM	A	Dividend	J	T	Buy	04/14/21	J		
141. CVS HEALTH CORP.	A	Dividend	J	T	Buy	04/14/21	J		
142. CHEGG INC COM		None	J	T	Buy	04/14/21	J		
143. CINTAS CORP	A	Dividend	J	T	Buy	04/14/21	J		
144. CONCOPHILLIPS COM	A	Dividend	J	T	Buy	04/14/21	J		
145. COSTCO WHOLESALE	A	Dividend	J	T	Buy	04/14/21	J		
146. DEEERE & CO.	A	Dividend	J	T	Buy	04/14/21	J		
147. DOLLAR GENERAL CORP.	A	Dividend	J	T	Buy	04/14/21	J		
148. EDWARDS LIFE SCIENCES		None	J	T	Buy	04/14/21	J		
149. ENBRIDGE INC COM	A	Dividend	J	T	Buy	04/14/21	J		
150. FACEBOOK INC		None	J	T	Buy	04/14/21	J		
151. FASTENAL COMSTK	A	Dividend	J	T	Buy	04/14/21	J		
152. GRAPHIC PACKAGING	A	Dividend	J	T	Buy	04/14/21	J		
153. HERSHEY COMPANY	A	Dividend	J	T	Buy	04/14/21	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
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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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)
154. HESS CORP.	A	Dividend	J	T	Buy	04/14/21	J		
155. HOME DEPOT	A	Dividend	J	T	Buy	04/14/21	J		
156. HONEYWELL INTERNATIONAL	A	Dividend	J	T	Buy	04/14/21	J		
157. INTUITIVE SURGICAL		None	J	T	Buy	04/14/21	J		
158. J.P.MORGAN CHASE	A	Dividend	J	T	Buy	04/14/21	J		
159. KROGER CO COM	A	Dividend	J	T	Buy	04/14/21	J		
160. LHC GROUP		None	J	T	Buy	04/14/21	J		
161. LULULEMON ATHLETICA		None	J	T	Buy	04/14/21	J		
162. MSCI INC	A	Dividend	J	T	Buy	04/14/21	J		
163. MARSH & MCLENNAN	A	Dividend	J	T	Buy	04/14/21	J		
164. MERK CO		None	J	T	Buy	04/14/21	J		
165. MICROSOFT CORP.	A	Dividend	K	T	Buy	04/14/21	K		
166. MOTOROLA SOLUTIONS	A	Dividend	J	T	Buy	04/14/21	J		
167. NASDAG INC.	A	Dividend	J	T	Buy	04/14/21	J		
168. NETFLIX INC		None	J	T	Buy	04/14/21	J		
169. NEMENT CORP.		None	J	T	Buy	04/14/21	J		
170. NEXTERA ENERGY	A	Dividend	J	T	Buy	04/14/21	J		

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

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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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171. NICE LTD		None	J	T	Buy	04/14/21	J		
172. NIKE INC CLASS B	A	Dividend	J	T	Buy	04/14/21	J		
173. NYIDIA CORP.		None	J	T	Buy	04/14/21	J		
174. OREILLY AUTOMOTIVE		None	J	T	Buy	04/14/21	J		
175. OKTA INC CLA		None	J	T	Buy	04/14/21	J		
176. PAYPAL HLDGS		None	J	T	Buy	04/14/21	J		
177. PINTEREST INC		None	J	T	Buy	04/14/21	J		
178. PROCTER AND GAMBLE	A	Dividend	J	T	Buy	04/14/21	J		
179. PROLOGIS INC	A	Dividend	J	T	Buy	04/14/21	J		
180. ROPER TECHNOLOGIES	A	Dividend	J	T	Buy	04/14/21	J		
181. SALESFORCE COM		None	J	T	Buy	04/14/21	J		
182. SPLUNK INC COM		None	J	T	Buy	04/14/21	J		
183. TELADOC HEALTH INC.		None	J	T	Buy	04/14/21	J		
184. TESLA INC		None	J	T	Buy	04/14/21	J		
185. TEXAS INSTRUMENT	A	Dividend	J	T	Buy	04/14/21	J		
186. THERMO FISHER SCIENTIFIC	A	Dividend	J	T	Buy	04/14/21	J		
187. TRACTOR SUPPLY	A	Dividend	J	T	Buy	04/14/21	J		

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

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188. TWILIO INC		None	J	T	Buy	04/14/21	J		
189. UNITED PARCEL SERVICE	A	Dividend	J	T	Buy	04/14/21	J		
190. UNITED HEALTH GROUP	A	Dividend	J	T	Buy	04/14/21	J		
191. VEEVA SYSTEMS		None	J	T	Buy	04/14/21	J		
192. VERIZON COMMUNICATION		None	J	T	Buy	04/14/21	J		
193. VISA INC.	A	Dividend	J	T	Buy	04/14/21	J		
194. VOYA FINANCIAL	A	Dividend	J	T	Buy	04/14/21	J		
195. WALMART INC COM	A	Dividend	J	T	Buy	04/14/21	J		
196. WASTE MANAGEMENT	A	Dividend	J	T	Buy	04/14/21	J		
197. ZOETIS INC.	A	Dividend	J	T	Buy	04/14/21	J		
198. ZYNGA INC.		None	J	T	Buy	04/14/21	J		
199. WALMART INC		None			Sold	05/18/21	J	A	
200. ACCENTURE PLC AVERAGE PRICE	A	Dividend	J	T	Buy	06/15/21	J		
201. JOHNSON CONTROL INTERNATIONAL	A	Dividend	J	T	Buy	06/15/21	J		
202. CROWDSTRIKE HLDGS INC		None	J	T	Buy	06/15/21	J		
203. INTERPUBLIC GROUP COS INC	A	Dividend	J	T	Buy	06/15/21	J		
204. ZEBRA TECHNOLOGIES CORP		None	J	T	Buy	06/15/21	J		

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

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205. APPLE INC		None			Sold	06/03/21	J		
206. COSTCO WHOLESALE		None			Sold	06/03/21	J	A	
207. MICROSOFT CORP		None			Sold	06/03/21	J		
208. FASTENAL COMSTK		None			Sold	06/11/21	J	A	
209. KROGER CO. COM		None			Sold (part)	06/11/21	J	A	
210. MERK & CO. INC.		None			Sold	06/15/21	J	A	
211. OKTA CLA		None			Sold	06/15/21	J		
212. SPLUNK INC COM		None			Sold	06/15/21	J		
213. TWILIO INC		None			Sold	06/15/21	J		
214. VERIZON COMMUNICATIONS		None			Sold	06/15/21	J		
215. AGILENT TECHNOLOGIES		None			Buy (add'l)	07/12/21	J		
216. INTUITIVE SURGICAL		None			Buy (add'l)	07/12/21	J		
217. UNITED HEALTH GROUP INC		None			Buy (add'l)	07/12/21	J		
218. VEEVA SYSTEMS INC		None			Buy (add'l)	07/12/21	J		
219. ZOETIS INC		None			Buy (add'l)	07/12/21	J		
220. ABBOTT LAB		None			Sold	07/12/21	J		
221. TELADOC HEALTH		None			Sold	07/12/21	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

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

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222. tHERMO FISHER		None			Sold	07/12/21	J	A	
223. PROCTOR AND GAMBLE CO.		None			Sold (part)	07/13/21	J	A	
224. PEPSICO INC		None			Buy	07/13/21	J		
225. CONDCOPHILLIPS INC		None			Sold	07/14/21	J	A	
226. BLACKROCK INC		None			Buy (add'l)	07/15/21	J		
227. VOYA FINANCIAL		None			Sold	07/15/21	J		
228. ALPHABET INC		None			Buy (add'l)	08/20/21	J		
229. AMAZON COM		None			Buy (add'l)	08/20/21	J		
230. FACEBOOK INC		None			Buy (add'l)	08/20/21	J		
231. PINTEREST INC		None			Sold	08/03/21	J		
232. NETFLIX		None			Sold	08/20/21	J		
233. ZYNGA INC		None			Sold	08/20/21	J		
234. TELSA INC. COM		None			Sold (part)	09/08/21	J	A	
235. TWILIO		None			Sold (part)	09/08/21	J		
236. ORGANON & CO. STOCK COMMON		None			Sold	09/16/21	J		
237. J.P. MORGAN CHASE		None			Sold (part)	10/06/21	J	A	
238. LHC GROUP		None			Sold (part)	10/06/21	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 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)
239. WASTE MANAGEMENT		None			Sold (part)	10/06/21	J	A	
240. ACCENTURE PLC AVERAGE PRICE		None			Sold	11/01/21	J	A	
241. JOHNSON CONTROLS INTERNATIONAL PLC COM USD1.00		None			Sold	11/01/21	J	A	
242. LINDE PLC COM EURO		None			Sold	11/01/21	J	A	
243. GARMIN LTD COM CHF		None			Sold	11/01/21	J	A	
244. ADOBE SYSTEMS INC COM		None			Sold	11/01/21	J	B	
245. ADVANCED MICRO DEVICES INC		None			Sold	11/01/21	J	B	
246. AGILIGENT TECHNOLOGIES INC COM		None			Sold	11/01/21	J	A	
247. ALPHABET INC CAP STK CL C		None			Sold	11/01/21	J	A	
248. ALPHABET INC CAP STK CL A		None			Sold	11/01/21	K	C	
249. AMAZON COM INC		None			Sold	11/01/21	K	A	
250. AMERICAN TOWER CORP NEW COM		None			Sold	11/01/21	J	A	
251. APPLE INC		None			Sold	11/01/21	K	C	
252. APPLIED MATERILS INC		None			Sold	11/01/21	J	A	
253. ASTRAZENENCEA ADR REP		None			Sold	11/01/21	J	A	
254. BAKER HUGHES COMPANY CL A		None			Sold	11/01/21	J	A	
255. BK OF AMERICA CORP COM		None			Sold	11/01/21	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
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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)
256. BLACKROCK INC COM		None			Sold	11/01/21	J	A	
257. CVS HEALTH CORP. COM		None			Sold	11/01/21	J	A	
258. CHEGG INC COM		None			Sold	11/01/21	J		
259. CINTAS CORP		None			Sold	11/01/21	J	B	
260. COSTCO WHOLESALE CORP		None			Sold	11/01/21	J		
261. CROWDSTRIKE HLDGS INC CL A		None			Sold	11/01/21	J	A	
262. DEERE & CO		None			Sold	11/01/21	J		
263. DOLLAR GEN CORP NEW COM		None			Sold	11/01/21	J	A	
264. EDWARDS LIFESCIENCES CORP		None			Sold	11/01/21	J	B	
265. ENBRIDGE INC COM ISIN		None			Sold	11/01/21	J	A	
266. FACEBOOK INC		None			Sold	11/01/21	J	A	
267. GRAPHIC PACKAGING HOLDING CO		None			Sold	11/01/21	J	A	
268. HERSHEY COM		None			Sold	11/01/21	J	A	
269. HESS CORP COM		None			Sold	11/01/21	J	A	
270. HOME DEPOT INC		None			Sold	11/01/21	J	B	
271. HONEYWELL INTERNATIONAL INC COM		None			Sold	11/01/21	J		
272. INTERPUBLIC GROUPS COS INC COM		None			Sold	11/01/21	J	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
Jones, Steve C.	05/22/2022

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)
273. INTUITIVE SURGICAL INC		None			Sold	11/01/21	J	A	
274. J.P. MORGAN CHASE		None			Sold	11/01/21	J	A	
275. KROGER CO COM		None			Sold	11/01/21	J	A	
276. LHC GROUP INC		None			Sold	11/01/21	J		
277. LULULEMON ATHLETICA INC COM		None			Sold	11/01/21	J	B	
278. MSCI INC		None			Sold	11/01/21	J	B	
279. MARSH & MCLENNAN COM		None			Sold	11/01/21	J	B	
280. MASCO CORP COM		None			Sold	11/01/21	J	A	
281. MICROSOFT CORP		None			Sold	11/01/21	J	D	
282. MOTOROLA SOLUTIONS INC COM		None			Sold	11/01/21	J	A	
283. NASDAG INC COM STK		None			Sold	11/01/21	J	B	
284. NEWMONT CORP COM		None			Sold	11/01/21	J		
285. NEXTERA ENGERGY INC COM		None			Sold	11/01/21	J	A	
286. NICE LTD ADR		None			Sold	11/01/21	J	A	
287. NIKE INC CLASS B COM		None			Sold	11/01/21	J	A	
288. NVIDIA CORP.		None			Sold	11/01/21	J	C	
289. OREILLY AUTOMOTIVE COM		None			Sold	11/01/21	J	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
Jones, Steve C.	05/22/2022

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)
290. PAYPAL HLDGS INC COM		None			Sold	11/01/21	J		
291. PEPSICO INC		None			Sold	11/01/21	J	A	
292. PROLOGIS INC		None			Sold	11/01/21	J	B	
293. SALESFORCE COM INC		None			Sold	11/01/21	J	B	
294. TELSA INC		None			Sold	11/01/21	J	C	
295. TEXAS INSTRUMENTS INC		None			Sold	11/01/21	J		
296. THERMO FISHER SCIENTIFIC INC		None			Sold	11/01/21	J	A	
297. TRACTOR SUPPLY CO		None			Sold	11/01/21	J	A	
298. TWILIO INC		None			Sold	11/01/21	J		
299. UNITED PARCEL SERVICE INC		None			Sold	11/01/21	J	B	
300. UNITED HEALTH GROUP INC		None			Sold	11/01/21	J	B	
301. VEEVA SYSTEMS INC		None			Sold	11/01/21	J	A	
302. VISA INC		None			Sold	11/01/21	J		
303. WASTE MANAGEMENT INC		None			Sold	11/01/21	J	A	
304. ZEBRA TECHNOLOGIES CORP		None			Sold	11/01/21	J	A	
305. ZOETIS INC		None			Sold	11/01/21	J	A	
306. SYNOVUS BANK DEPOSIT SWEEP	A	Interest	J	T	Buy	11/01/21	N		

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, Steve C.	05/22/2022

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)
307. SYNOVUS BANK DEPOSIT SWEEP	A	Interest	J	T	Sold	11/03/21	N		
308. ISHARES RUSSELL MID-CAP VALUE ETF	A	Dividend	K	T	Buy	11/09/21	K		
309. ISHARES TR RUS MD CP GR ETF	A	Dividend	K	T	Buy	11/09/21	K		
310. ISHARES RUSSELL 1000 VALUE ETF	A	Dividend	L	T	Buy	11/09/21	L		
311. ISHARES TR RUS 1000 GRW ETF	A	Dividend	L	T	Buy	11/09/21	L		
312. ISHARES TR US TREAS BD ETF	A	Dividend	J	T	Buy	11/09/21	J		
313. SPDR GOLD TR GOLD SHS		None	K	T	Buy	11/09/21	K		
314. SPDR MSCI ACWI EX US ETF	A	Dividend	J	T	Buy	11/09/21	J		
315. SPDR PORTIFOLIO SHORT TERM	A	Dividend	J	T	Buy	11/09/21	J		
316. VANGUARD SPECIALIZED FUNDS DIV	A	Dividend	K	T	Buy	11/09/21	K		
317. VANGUARD MEGA CAP GROWTH INDEX FUND	A	Dividend	K	T	Buy	11/09/21	K		
318. VANGUARD INTL EQUITY INDEX FDS EMR MKT	A	Dividend	J	T	Buy	11/09/21	J		
319. VANGUARD INTL EQUITY INDEX FDS FTSE EUROPE ETF	A	Dividend	J	T	Buy	11/09/21	J		
320. VANGUARD SCOTTSDALE FDS INTER TERM TREAS	A	Dividend	J	T	Buy	11/09/21	J		
321. VANGUARD REAL ESTATE ETF	A	Dividend	J	T	Buy	11/09/21	J		
322. ISHARES TR 20 YR TR BD ETF	A	Dividend	J	T	Buy	11/09/21	J		
323. ISHARES MSCI EAFE ETF	A	Dividend	J	T	Buy	11/09/21	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
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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)
324. ISHARES RUSSELL		None	J	T	Sold (part)	12/06/21	J		
325. ISHARES TR RUS 1000		None	J	T	Sold (part)	12/06/21	J		
326. SPDR MSCI		None	J	T	Buy (add'l)	12/27/21	J		
327.									
328.									
329.									
330.									
331.									
332.									
333.									
334.									
335.									
336.									
337.									
338.									
339.									
340.									

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
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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)
341.									
342.									
343.									
344.									
345.									
346.									
347.									
348.									
349.									
350.									
351.									
352.									
353.									
354.									
355.									
356.									
357.									

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
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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)
358.									
359.									
360.									
361.									
362.									
363.									
364.									
365.									

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.)*

Name of Person Reporting	Date of Report
Jones, Steve C.	05/22/2022

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/ Steve C. 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. § 104)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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