AO 10
Rev. 1/2017

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
Joseph, David C.	Western District of Louisiana	05/13/2024
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**
District Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
800 Lafayette Street, Suite 4700 Lafayette, LA 70501		

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.		
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.	2022	Self-employed Breast Radiologist
2.	2022	Breast radiologist for Lafayette General Hospital
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.	George Mason Law School	07/24/2022 - 07/31/2022	London, United Kingdom	Seminar (Judicial Seminar on English Foundations of the Rule of Law and Liberty)	Lodging, meals, travel
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.			
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
Joseph, David C.	05/13/2024

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		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)	(5) Identity of buyer/seller (if private transaction)
1.	Greensquare- AMLP IRA #1	A	Dividend	J	T					
2.	Greensquare- BBBIX IRA #1	A	Dividend	K	T					
3.	Greensquare- GLIFX IRA #1	A	Dividend			Sold	12/16/22	J	A	
4.	Greensquare- MINT IRA #1	A	Dividend	K	T					
5.	Greensquare- VFSUX IRA #1	A	Dividend	K	T					
6.	Greensquare- VOO IRA #1	C	Dividend	M	T					
7.	USAA savings account cash equivalent- USAA #4	A	Interest	J	T					
8.	Northwestern Mutual whole life policy	A	Distribution	J	T					
9.	Louisiana START 529 Louisiana Principal Protection Fund #1	A	Interest	K	T	Sold (part)	04/18/22	K		
10.						Buy (add'l)	04/18/22	K		
11.						Sold (part)	04/25/22	K		
12.						Buy (add'l)	04/25/22	K		
13.						Sold (part)	04/27/22	K		
14.						Buy (add'l)	04/27/22	K		
15.	Louisiana START #1- Vanguard Total World		None	J	T	Sold (part)	04/18/22	J		
16.						Buy (add'l)	04/18/22	J		
17.						Sold (part)	04/25/22	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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Joseph, David C.	05/13/2024

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)	04/25/22	J		
19.						Sold (part)	04/27/22	J		
20.						Buy (add'l)	04/27/22	J		
21.	Louisiana START #1- Inst Total Stock Index	A	Dividend	J	T	Sold (part)	04/18/22	J		
22.						Buy (add'l)	04/18/22	J		
23.						Sold (part)	04/25/22	J		
24.						Buy (add'l)	04/25/22	J		
25.						Sold (part)	04/27/22	J		
26.						Buy (add'l)	04/27/22	J		
27.	Louisiana START #1- Total International Stk		None	J	T	Sold (part)	04/18/22	J		
28.						Buy (add'l)	04/18/22	J		
29.						Sold (part)	04/25/22	J		
30.						Buy (add'l)	04/25/22	J		
31.						Sold (part)	04/27/22	J		
32.						Buy (add'l)	04/27/22	J		
33.	Louisiana START #1- Vanguard Large-Cap Idx		None	J	T	Sold (part)	04/18/22	J		
34.						Buy (add'l)	04/18/22	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	
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35.						Sold (part)	04/25/22	J		
36.						Buy (add'l)	04/25/22	J		
37.						Sold (part)	04/27/22	J		
38.						Buy (add'l)	04/27/22	J		
39.	Louisiana START 529 Louisiana Principal Protection Fund #2	A	Interest	K	T					
40.	Louisiana START #2- Vaguard Total World		None	J	T					
41.	Louisiana START #2- Inst Total Stock Index	A	Dividend	J	T					
42.	Louisiana START #2- Total International Stk		None	J	T					
43.	Louisiana START #2- Vanguard Large-Cap Idx		None	J	T					
44.	Greensquare- BND IRA #1	A	Dividend	K	T					
45.	Greensquare- BRKB IRA #1		None	J	T					
46.	Greensquare- VGSH IRA #1	A	Dividend	K	T					
47.	Greensquare- VGSH IRA #2		None	J	T					
48.	Greensquare- BBBIX IRA #2		None	J	T					
49.	Greensquare- GLIFX IRA #2		None			Sold	12/16/22	J	A	
50.	Greensquare- MINT IRA #2		None	J	T					
51.	Greensquare- VFSUX IRA #2		None	J	T					

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52. Greensquare- VOO IRA #2	A	Dividend	K	T					
53. Morgan Stanley (H)									
54. --- Morgan Stanley Private Bank		None	J	T					
55. --- Aam Bahl & Gaynor	B	Dividend	L	T	Buy (add'l)	03/03/22	J		
56.					Buy (add'l)	06/03/22	J		
57.					Buy (add'l)	09/06/22	J		
58.					Buy (add'l)	10/04/22	J		
59.					Sold (part)	11/01/22	J		
60.					Buy (add'l)	11/04/22	J		
61. --- Aristotle Value Equity	A	Dividend	L	T	Buy (add'l)	02/03/22	J		
62.					Buy (add'l)	03/03/22	J		
63.					Buy (add'l)	07/06/22	J		
64.					Buy (add'l)	10/04/22	J		
65.					Sold (part)	11/01/22	J		
66.					Buy (add'l)	11/04/22	J		
67.					Buy (add'l)	12/29/22	J		
68. --- EV High Yield Muni Income I	C	Dividend	L	T	Buy (add'l)	01/06/22	J		

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69.					Buy (add'l)	02/03/22	J		
70.					Buy (add'l)	04/07/22	J		
71.					Buy (add'l)	05/04/22	J		
72.					Buy (add'l)	06/03/22	J		
73.					Buy (add'l)	08/03/22	J		
74.					Buy (add'l)	09/21/22	J		
75.					Buy (add'l)	11/03/22	J		
76. --- Federated HRMS Intl STR VLD IS	B	Dividend	L	T	Buy (add'l)	07/07/22	J		
77.					Buy (add'l)	09/06/22	J		
78.					Buy (add'l)	10/04/22	J		
79.					Sold (part)	11/01/22	J		
80. --- Mainstay McKay TX Free BD	D	Dividend	M	T	Buy (add'l)	01/06/22	J		
81.					Buy (add'l)	02/03/22	J		
82.					Buy (add'l)	03/03/22	J		
83.					Buy (add'l)	04/07/22	J		
84.					Buy (add'l)	05/04/22	J		
85.					Buy (add'l)	06/02/22	J		

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2. Value Codes (See Columns C1 and D3)
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L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
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3. Value Method Codes (See Column C2)
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86.					Buy (add'l)	08/03/22	J		
87.					Buy (add'l)	10/05/22	J		
88.					Buy (add'l)	11/04/22	J		
89. --- Nuance Mid Cap Value Instnl	C	Dividend	K	T	Buy (add'l)	01/06/22	J		
90.					Buy (add'l)	08/03/22	J		
91. --- Voya Strat Inc Opport I	B	Dividend	L	T	Buy (add'l)	01/06/22	J		
92.					Buy (add'l)	06/03/22	J		
93.					Buy (add'l)	08/03/22	J		
94.					Buy (add'l)	12/29/22	J		
95. Charles Schwab Roth IRA (H)									
96. ---- Cash & Bank Sweep (Y)									
97. ----Invesco Gold and Special (OPGSX)		None	J	T					
98. ----iShares TIPS Bond ETF (TIPS)	A	Dividend	J	T	Buy	05/19/22	J		
99. --- Vanguard Dividend Appreciation Fund ETF (VIG)		None			Sold	05/19/22	J	A	
100. Charles Schwab (H)									
101. ---- Charles Schwab Bank (Y)									
102. --- Schwab Muni Money Fund SWTXX		None			Sold	10/03/22	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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103. ---- Vanguard Energy ETF VDE	B	Dividend	K	T					
104. ---- iShares Bond EFT TIPS	B	Dividend	K	T					
105. ---- Invesco CurrencyShares FXB		None	J	T	Buy	10/04/22	J		
106. Greensquare Cash- #1 SEP IRA		None	K	T					
107. Greensquare Cash- #2 Roth IRA		None	J	T					
108. USAA Checking Account #5	A	Interest	K	T					
109. Disney Stock		None	J	T					
110. USAA Checking Account #6	A	Interest	K	T					
111. American Express National Bank	B	Interest	M	T					
112. Greensquare- AMLP IRA #2		None	J	T					
113. Louisiana START #3- LS Moderate Growth		None	J	T					
114. Louisiana START #1- Earnings Enhancements		None	J	T					
115. Greensquare- PDBC IRA #1		None	J	T	Buy	12/21/22	J		
116. Greensquare- PDBC IRA #2		None	J	T	Buy	12/21/22	J		
117. Greensquare- RMLPX IRA #1		None	J	T	Buy	12/16/22	J		
118. Louisiana START #1- Vanguard Small-Cap Idx (VMCIX)		None	J	T	Buy	04/18/22	J		
119.					Sold (part)	04/25/22	J		

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2. Value Codes (See Columns C1 and D3)
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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. 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)
120.					Buy (add'l)	04/25/22	J		
121.					Sold (part)	04/27/22	J		
122.					Buy (add'l)	04/27/22	J		
123. Louisiana START #1-Vanguard Mid-Cap Idx (VLISX)		None	J	T	Buy	04/18/22	J		
124.					Sold (part)	04/25/22	J		
125.					Buy (add'l)	04/25/22	J		
126.					Sold (part)	04/27/22	J		
127.					Buy (add'l)	04/27/22	J		
128. Vanguard 401k (H)									
129. ----PIMCO Total Return Inst	A	Dividend	K	T	Buy	01/03/22	J		
130.					Buy (add'l)	03/31/22	J		
131.					Buy (add'l)	06/30/22	J		
132.					Buy (add'l)	09/30/22	J		
133. ----AmerFundsEuroPacificGrR6	A	Dividend	K	T	Buy	01/03/22	K		
134.					Buy (add'l)	03/31/22	J		
135.					Buy (add'l)	06/30/22	J		
136.					Buy (add'l)	09/30/22	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
Joseph, David C.	05/13/2024

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)
137. ----Vanguard Federal Money Mkt Fund	A	Dividend	K	T	Buy	01/03/22	J		
138.					Buy (add'l)	03/31/22	J		
139.					Buy (add'l)	06/30/22	J		
140.					Buy (add'l)	09/30/22	J		
141. ----Vanguard Target Retire 2045 TR		None	J	T	Buy	01/03/22	J		
142. ----Dodge & Cox Stock	A	Dividend	J	T	Buy	01/03/22	J		
143.					Buy (add'l)	06/30/22	J		
144.					Buy (add'l)	09/30/22	J		
145. ----ClearBridge Sm Cap Gr IS		None	J	T	Buy	01/03/22	J		
146. ----TRP Blue Chip Growth I CI	A	Dividend	J	T	Buy	01/03/22	J		
147.					Buy (add'l)	06/30/22	J		
148.					Buy (add'l)	09/30/22	J		
149. ----JPMorgan SmallCap ValueR6	A	Dividend	J	T	Buy	01/03/22	J		
150. ----JPM MidCapValue R6	A	Dividend	J	T	Buy	01/03/22	J		
151. Louisiana START #1- LS Income Fund		None			Buy	04/18/22	J		
152.					Sold (part)	04/25/22	J		
153.					Buy (add'l)	04/25/22	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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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
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Name of Person Reporting	Date of Report
Joseph, David C.	05/13/2024

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)
154.					Sold (part)	04/27/22	J		
155.					Buy (add'l)	04/27/22	J		
156.					Sold	11/10/22	J		
157. Louisiana START #1- Age-Based Moderate Track Fund		None	J	T	Buy	11/10/22	J		
158. White Farm Properties, LLC (X)		None	M	W					
159. Morgan Stanley #2 (H)									
160. ---Morgan Stanley Private Bank		None	J	T	Open	11/29/22	J		
161. ---MSBNA Preferred Savings		None	J	T	Open	12/01/22	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		

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

Line 160: Inadvertently left off prior reports.

Name of Person Reporting	Date of Report
Joseph, David C.	05/13/2024

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/ David C. Joseph

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