AO 10
Rev. 1/2022

# FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

*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 |
|---|---|---|
| Joun, Myong J. | U.S. District Court, Massachusetts | 05/13/2025 |
| **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** |
| Active U.S. District Judge | ☐ Nomination Date<br>☐ Initial ☑ Annual ☐ Final<br>**5b.** ☐ Amended Report | 01/01/2024<br>**to**<br>12/31/2024 |
| **7. Chambers or Office Address** | | |
| United States District Court for the District of Massachusetts<br>John Joseph Moakley Courthouse<br>One Courthouse Way<br>Boston, MA 02210 | | |

***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. | Trustee | Flaschner Judicial Institute |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |

## 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. | 2019 | Massachusetts Deferred Compensation SMART Plan |
| 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. | 2024 | United States Judges, Salary | $216,378.48 |
| 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. | 2024 | Diversity@Workplace Colsulting Group LLC |
| 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. | | | | | |
| 2. | | | | | |
| 3. | | | | | |
| 4. | | | | | |
| 5. | | | | | |

## 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. | | | |
| 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. | American Education Services | Student loans | K |
| 2. | Aidvantage | Student loans | K |
| 3. | Aidvantage | PLUS loans | M |
| 4. | Mohela | Student loans | K |
| 5. | | | |

| Name of Person Reporting | Date of Report |
|---|---|
| **Joun, Myong J.** | 05/13/2025 |

## 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. | Eastern Bank Cash Account | | None | J | T | | | | | |
| 2. | Chase Bank Cash Account | A | Interest | J | T | | | | | |
| 3. | Apple (Goldman Sachs Bank Cash Account | A | Interest | J | T | | | | | |
| 4. | Leader Bank Cash Accounts | A | Interest | N | T | | | | | |
| 5. | Bank of America Cash Accounts | | None | L | T | | | | | |
| 6. | Fidelity Rollover IRA | | | | | | | | | |
| 7. | - Fidelity International Value (FIVLX) | A | Int./Div. | J | T | | | | | |
| 8. | - Fidelity International Cap Appreciation Fund (FIVFX) | A | Int./Div. | J | T | | | | | |
| 9. | - Fidelity Zero Large Cap Index Fund (FNILX) | A | Int./Div. | J | T | | | | | |
| 10. | - Fidelity Total Market Index Fund (KSKAX) | A | Int./Div. | J | T | | | | | |
| 11. | - Fidelity International Index Fund (FSPSX) | A | Int./Div. | J | T | | | | | |
| 12. | - Fidelity 500 Index Fund (FXAIX) | A | Int./Div. | J | T | | | | | |
| 13. | - Fidelity Nasdaq Composite Index (FNCMX) | A | Int./Div. | J | T | | | | | |
| 14. | - Fidelity Contrafund (FCNTX) | A | Int./Div. | J | T | | | | | |
| 15. | - Fidelity Small Cap Index Fund (FSSNX) | A | Int./Div. | J | T | | | | | |
| 16. | - Fidelity Mid Cap Index Fund (FSMDX) | A | Int./Div. | J | T | | | | | |
| 17. | - Fidelity Global Ex US Index Fund (FSGGX) | A | Int./Div. | J | 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 |
|---|---|
| **Joun, Myong J.** | 05/13/2025 |

## 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. - Fidelity Mega Cap Stock Fund (FGRTX) | A | Int./Div. | J | T | | | | | |
| 19. - Fidelity New Millenium (FMILX) | A | Int./Div. | J | T | | | | | |
| 20. - Fidelity Multi Asset Index Fund (FFNOX) | A | Int./Div. | J | T | | | | | |
| 21. - Fidelity Balanced (FBALX) | A | Int./Div. | J | T | | | | | |
| 22. - Fidelity Zero Internaational Index (FZILX) | A | Int./Div. | J | T | | | | | |
| 23. - Fidelity Zero Total Market Index (FZROX) | A | Int./Div. | J | T | | | | | |
| 24. - Fidelity US Sustainability Index Fund (FITLX) | A | Int./Div. | J | T | | | | | |
| 25. - Fidelity Total Intl Index Fund (FTIHX) | A | Int./Div. | J | T | | | | | |
| 26. - Fidelity Large Cap Growth Index (FSPGX) | A | Int./Div. | J | T | | | | | |
| 27. - Fidelity Investments Grade (FBNDX) | A | Int./Div. | J | T | | | | | |
| 28. - Fidelity US Bond Index Fund (FXNAX) | A | Int./Div. | J | T | | | | | |
| 29. - Fidelity Corporate Bond Fund (FCBFX) | A | Int./Div. | J | T | | | | | |
| 30. - Fidelity Total Bond (FTBFX) | A | Int./Div. | J | T | | | | | |
| 31. - Fidelity Inter Treasury Bond Index (FUAMX | A | Int./Div. | K | T | | | | | |
| 32. - Fidelity Govt Cash Reserves (FDRXX) | A | Int./Div. | J | T | | | | | |
| 33. Fidelity SEP-IRA (H) | | | | | | | | | |
| 34. - Truist Bank IRA | A | Interest | L | 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

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|---|---|---|---|---|---|---|---|---|---|
| 35. - Wells Fargo IRA | A | Interest | J | T | | | | | |
| 36. - Fifth Third IRA | A | Interest | J | T | | | | | |
| 37. Thrift Savings Plan | | | | | | | | | |
| 38. - L 2035 | A | Int./Div. | K | T | | | | | |
| 39. MA Deferred Compensation SMART Plan (H) | | | | | | | | | |
| 40. - International Stock Index Fund | A | Int./Div. | J | T | | | | | |
| 41. - International Equity Fund | A | Int./Div. | J | T | | | | | |
| 42. - Real Estate REIT Fund | A | Int./Div. | J | T | | | | | |
| 43. - Small Company Stock Index Fund | A | Int./Div. | J | T | | | | | |
| 44. - Large Company Value Stock Fund | A | Int./Div. | J | T | | | | | |
| 45. - Large Company Blend Stock Fund | A | Int./Div. | J | T | | | | | |
| 46. - Large Company Stock Index Fund | A | Int./Div. | J | T | | | | | |
| 47. - High Yield Bond Fund | A | Int./Div. | J | T | | | | | |
| 48. - Diversified Bond Fund | A | Int./Div. | J | T | | | | | |
| 49. - Bond Index Fund | A | Int./Div. | J | T | | | | | |
| 50. - Treas Inflation Protection TIPS Idx Fd | A | Int./Div. | J | T | | | | | |
| 51. - SMART Capital Preservation Fund | A | Int./Div. | 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
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3. Value Method Codes (See Column C2)
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|---|---|---|---|---|---|---|---|---|---|
| 52. Blue Cross Blue Shield of MA Employee Savings Plan (H) | | | | | | | | | |
| 53. - Fidelity Freedom Blend 2035 Fund | A | Int./Div. | L | T | | | | | |
| 54. - Fidelity Freedom Blend Income Fund | A | Int./Div. | K | T | | | | | |
| 55. - Pimco Total Return Fund Institutional Class | A | Int./Div. | K | T | | | | | |
| 56. - Managed Income Portfolio II Class 2 | A | Int./Div. | K | T | | | | | |
| 57. - Vanguard Total Bond Market Index Fund Institutional Shares | A | Int./Div. | K | T | | | | | |
| 58. - JHanock Strategic FX INC RCA | A | Int./Div. | K | T | | | | | |
| 59. - Fidelity Freedom Blend 2010 Fund | A | Int./Div. | J | T | | | | | |
| 60. - Fidelity Freedom Blend 2025 Fund | A | Int./Div. | J | T | | | | | |
| 61. - Fidelity Freedom Blend 2015 Fund | A | Int./Div. | J | T | | | | | |
| 62. - Fidelity Freedom Blend 2020 Fund | A | Int./Div. | J | T | | | | | |
| 63. - Fidelity Freedom Blend 2040 Fund | A | Int./Div. | J | T | | | | | |
| 64. - Fidelity Freedom Blend 2050 Fund | A | Int./Div. | J | T | | | | | |
| 65. - Fidelity Freedom Blend 2065 Fund | A | Int./Div. | J | T | | | | | |
| 66. - Fidelity Freedom Blend 2055 Fund | A | Int./Div. | J | T | | | | | |
| 67. - Fidelity Freedom Blend 2060 Fund | A | Int./Div. | J | T | | | | | |
| 68. - Fidelity Freedom Blend 2045 Fund | A | Int./Div. | J | T | | | | | |

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|---|---|---|---|---|---|---|---|---|---|
| 69. Blue Cross Blue Shield of MA Retirement Income Trust | A | Int./Div. | K | T | | | | | |
| 70. Diversity@Workplace Consulting Group LLC | | None | N | W | | | | | |
| 71. | | | | | | | | | |
| 72. | | | | | | | | | |
| 73. | | | | | | | | | |
| 74. | | | | | | | | | |

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 |
|---|---|
| **Joun, Myong J.** | 05/13/2025 |

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

| Name of Person Reporting | Date of Report |
|---|---|
| **Joun, Myong J.** | 05/13/2025 |

## 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/ Myong J. Joun**

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