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
Kelly, Jane	8th Circuit	04/30/2024
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**
U.S. Circuit Judge - active status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
United States Courthouse 111 7th Avenue SE, Box 20 Cedar Rapids, Iowa 52401		

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.		
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.	1993	Illinois SURS-traditional benefit 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.			
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.		
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.	Iowa Academy of Trial Lawyers	February 23-24, 2023	Des Moines, Iowa	Speaker at Annual Seminar	transportation, hotel, food
2.	Pulaski County Bar Foundation	March 30-31, 2023	Little Rock, Arkansas	Speaker at Corbin Appellate Symposium	transportation, hotel, food
3.	American Society of International Law	November 16-18, 2023	Washington D.C.	Annual Meeting	transportation, hotel, food
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.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Kelly, Jane	04/30/2024

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)	
1. Trust (H)									
2. --Vanguard 500 Index Fund	B	Dividend	L	T					
3. --shares in Cox-Kelly Farms (subchapter S corporation)	G	Distribution	O	W					
4. --Fidelity Core Account	A	Interest	M	T					
5. --Fidelity 500 Index Fund	E	Dividend	P1	T					
6. TIAA CREF fixed rate annuity	E	Distribution	K	T					
7. U.S. Bank, cash accounts	A	Interest	O	T					
8. Chubb Limited stock	A	Dividend	K	T					
9. Accenture stock	A	Dividend	K	T					
10. Amphenol Corp. stock	A	Dividend	K	T	Sold (part)	08/16/23	J	B	
11. Apple Inc stock	B	Dividend	L	T					
12. CSX Corp stock	A	Dividend	K	T					
13. First Republic Bank stock	A	Dividend			Sold	03/20/23	J	D	
14. Alphabet Inc.- Class A stock	B	Dividend	K	T					
15. Alphabet Inc. -Class C stock	B	Dividend	K	T	Sold (part)	08/16/23	J	D	
16.					Sold (part)	12/22/23	J	C	
17. Ishares Russell 2000 Growth ETF	A	Dividend	K	T	Sold (part)	08/16/23	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
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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
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 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.						Sold (part)	12/22/23	J	A	
19.	Mastercard Inc stock	A	Dividend	K	T					
20.	Nextera Energy stock	A	Dividend	K	T					
21.	Skyworks Solutions stock	A	Dividend	K	T					
22.	Raytheon Technologies Corp stock	A	Dividend	J	T					
23.	ISU Facilities Corporation Iowa Revenue Biosciences Building Projects	A	Interest	J	T					
24.	Iowa Higher Ed Loan Auth Rev Refunding Private College Facility Drake	A	Interest	J	T					
25.	State University Iowa Univ Revenue Dormitory Series S U I	A	Interest	J	T					
26.	College Iowa Community School District Linn Johnson Benton Counties	A	Interest	K	T					
27.	Vanguard CRSP Growth ETF	A	Dividend	J	T					
28.	Vanguard CRSP Value ETF	A	Dividend	K	T					
29.	Higher Dimension Research stock		None	J	W					
30.	Comcast Corporation, Class A	A	Dividend	J	T	Sold (part)	08/16/23	J	A	
31.	American Funds, The Growth Fund of America	A	Dividend	J	T					
32.	American Funds, The New Economy Fund	A	Dividend	J	T					
33.	American Funds, The New Perspective Fund	A	Dividend	J	T					
34.	American Funds, The SmallCap World Fund	A	Dividend	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

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Kelly, Jane	04/30/2024

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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)	
35. Bank of the West cash account		None	K	T					
36. JP Morgan Chase Bond (no additonal detail available)	A	Interest	K	T					
37. JP Morgan Chase Stock	A	Dividend	K	T	Sold (part)	08/16/23	J	A	
38.					Sold (part)	12/22/23	J	A	
39. Abbott Labs stock	A	Dividend	K	T	Sold (part)	08/16/23	J	B	
40. Cedar Rapids Iowa bond Series A	A	Interest	K	T					
41. Lockheed Martin Corp stock	A	Dividend	K	T					
42. Johnson & Johnson stock	A	Dividend	K	T					
43. Thermo Fisher Scientific stock	A	Dividend	K	T	Sold (part)	12/22/23	J	C	
44. College IA Community bond (exp June 2025)	A	Interest	K	T					
45. Mondelez International stock	A	Dividend	K	T					
46. Air Products and Chemicals stock	A	Dividend	J	T					
47. Bank of America, common stock	A	Dividend	K	T					
48. Lam Research Group stock	A	Dividend	K	T					
49. Constellation Brands stock	A	Dividend	J	T	Sold (part)	08/16/23	J	A	
50. Schwab Value Advantage, money market account	A	Interest	K	T					
51. SPDR Inv Grade Floating ETF	A	Dividend	K	T					

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52. Prudential Financial Inc. stock	B	Dividend			Sold	07/07/23	K	A	
53. Amazon.com Inc stock	B	Dividend	K	T					
54. Crown Castle International Corp stock	A	Dividend			Sold	11/20/23	J	A	
55. Meta Platforms	B	Dividend	K	T	Sold (part)	08/16/23	J	A	
56.					Sold (part)	12/22/23	J	B	
57. Merck and Co. Inc. stock	A	Dividend	K	T					
58. Microsoft Corp. stock	A	Dividend	K	T					
59. ICON Plc	A	Dividend	K	T	Sold (part)	08/16/23	J	A	
60.					Sold (part)	12/22/23	J	A	
61. Koninklijke Ahold stock	A	Dividend	K	T					
62. Novartis AG -ADR stock	A	Dividend	K	T	Sold (part)	08/16/23	J	A	
63. Pepsico Inc stock	A	Dividend	K	T	Sold (part)	12/22/23	J	A	
64. Cal Atlantic Group bond	A	Interest	J	T					
65. Otis Worldwide Corp stock	A	Dividend	J	T					
66. Nike Inc stock	A	Dividend	J	T					
67. Target Corp stock	A	Dividend			Sold	11/20/23	J	A	
68. Hasbro Inc stock	A	Dividend	J	T	Buy (add'l)	08/16/23	J		

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69.	Nucor Corp stock	A	Dividend	J	T	Sold (part)	12/22/23	J	C	
70.	Akamai Technologies stock	A	Dividend	J	T					
71.	Taiwan SemiConductor Mfg stock	A	Dividend	K	T					
72.	Canadian Solar Inc stock	A	Dividend	J	T					
73.	Carrier Global stock	A	Dividend	K	T	Sold (part)	08/16/23	J	B	
74.						Sold (part)	12/22/23	J	B	
75.	Waukee Iowa Community Schools bond Series A	A	Interest	J	T					
76.	Ford Motor Co. stock	A	Dividend	J	T					
77.	Oshkosh Corp. stock	A	Dividend			Sold	01/18/23	K	A	
78.	Fleetcor Technologies stock	A	Dividend			Sold	01/17/23	J	A	
79.	Teledyne Technologies stock	A	Dividend	K	T					
80.	Enbridge Inc. stock	A	Dividend	J	T					
81.	Sony Group Corp stock	A	Dividend	K	T					
82.	Toronto-Dominion Bank stock	A	Dividend	K	T					
83.	Dupont De Nemours bond	A	Interest	K	T					
84.	Kirkwood Community College Iowa School Merged Area X Series bond	A	Interest	K	T					
85.	Exxon Mobil Corp	A	Dividend	K	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. Vanguard Intermediate Term (bond)	A	Dividend	K	T					
87. Phillips 66	A	Dividend	J	T					
88. McKesson Corp	A	Dividend	J	T					
89. Nvidia Corp	A	Dividend	K	T	Sold (part)	04/10/23	J	A	
90.					Sold (part)	08/16/23	J	A	
91.					Sold (part)	12/22/23	J	B	
92. Salesforce.com Inc	A	Dividend	K	T	Sold (part)	08/16/23	J	A	
93.					Sold (part)	12/22/23	J	A	
94. Sociedad Quimica y Minera de Chile	A	Dividend			Sold	08/16/23	J	A	
95. Vertex Pharmaceuticals Inc	A	Dividend	K	T	Buy (add'l)	08/16/23	J		
96. Kenvue (spin-off from Johnson & Johnson)	A	Dividend	J	T	Spinoff (from line 42)	08/24/23	J		
97.					Sold	08/25/23	J	A	
98. Sandoz Group (spin-ff from Novartis)	A	Dividend	J	T	Spinoff (from line 62)	10/04/23	J		
99.					Sold	10/06/23	J	A	
100. Eaton Corp PLC	A	Dividend	J	T	Buy	01/19/23	K		
101.					Sold (part)	08/16/23	J	A	
102.					Sold (part)	12/22/23	J	A	

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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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103. Welltower Inc	A	Dividend	J	T	Buy	11/21/23	J		
104. Adobe Inc	A	Dividend	K	T	Buy	07/10/23	K		
105. Lamb Weston Holding	A	Dividend	J	T	Buy	11/21/23	J		
106.					Buy (add'l)	12/22/23	K		
107. Wex Inc	A	Dividend	K	T	Buy	01/18/23	K		
108.					Buy (add'l)	08/16/23	K		

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
Kelly, Jane	04/30/2024

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/ Jane Kelly

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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