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
Kelly, Timothy J.	U.S. District Court for the District of Columbia	06/30/2022
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**
U.S. District Judge (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
Prettyman U.S. Federal Courthouse 333 Constitution Avenue, NW Washington, DC 20001		

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.	2021	[redacted] (salary)
2.		
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.					

Name of Person Reporting	Date of Report
Kelly, Timothy J.	06/30/2022

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.	[redacted]	Tuition Agreement	None
2.			
3.			
4.			
5.			

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Kelly, Timothy J.	06/30/2022

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. Individual Assets (H)									
2. Wells Fargo (cash)	A	Interest	J	T					
3. Account #1 (H)									
4. Wells Fargo Bank Standard Deposit (cash) (X)	A	Interest	J	T					
5. Invesco Optimum Yld ETF (PDBC)	A	Dividend	J	T	Buy	07/22/21	J		
6. Invesco Tr II Emerging Mkts Sovereign ETF (PCY)	A	Dividend	J	T	Buy (add'l)	05/04/21	J		
7. Ishares Russell 2000 ETF (IWM)	A	Dividend	K	T	Sold (part)	01/06/21	J	A	
8.					Sold (part)	07/22/21	J	B	
9. Ishares Core MSCI ETF (IEFA)	A	Dividend	J	T	Buy	07/22/21	J		
10. Ishares Core S&P Tot U.S. Stock Mkt ETF (ITOT)	A	Dividend	J	T	Buy	07/22/21	J		
11. Ishares Core S&P Mid ETF (IJH)	A	Dividend	J	T	Sold (part)	05/04/21	J	A	
12. Ishares Core S&P 500 Index Fd (IVV)	A	Dividend	K	T					
13. Ishares Core U.S. Aggregate Bond ETF (AGG)	A	Dividend	K	T	Buy (add'l)	01/06/21	J		
14.					Buy (add'l)	05/04/21	J		
15.					Sold (part)	07/22/21	J		
16. Ishares Iboxx High Yield Corp Bond ETF (HYG)	A	Dividend	J	T	Buy (add'l)	07/22/21	J		
17. Ishares Inc Core MSCI Emerging Mkts (IEMG)	A	Dividend	J	T	Buy	07/22/21	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 S&P 500 Growth ETF (IVW)	A	Dividend	K	T	Sold (part)	05/04/21	J	A	
19.					Sold (part)	07/22/21	J	B	
20. Ishares S&P 500 Value ETF (IVE)	A	Dividend	K	T	Sold (part)	07/22/21	J	A	
21. Vanguard FTSE Developed Mkts ETF (VEA)	A	Dividend	K	T					
22. Vanguard Intl Equity Index Fds Ftse Emerging Mkts ETF (VWO)	A	Dividend	K	T					
23. Vanguard Mid Cap ETF (VO)	A	Dividend	K	T	Sold (part)	01/06/21	J	A	
24. Account #2 (H)									
25. Invesco TR II Emerging Mkts Sovereign ETF (PCY) (X)	A	Dividend	J	T					
26. Ishares Russell 2000 ETF (IWM)	A	Dividend	J	T	Sold (part)	07/22/21	J		
27. Ishares Core MSCI ETF (IEFA)	A	Dividend	J	T	Buy	07/22/21	J		
28. Ishares Core S&P Tot U.S. Stock Mkt ETF (ITOT)	A	Dividend	J	T	Buy	07/22/21	J		
29. Ishares Core S&P Mid ETF (IJH)	A	Dividend	J	T					
30. Ishares Core S&P 500 Index Fd (IVV)	A	Dividend	J	T					
31. Ishares Core U.S. Aggregate Bond ETF (AGG)	A	Dividend	J	T	Sold (part)	07/22/21	J		
32. Ishares Iboxx High Yield Corp Bond ETF (HYG) (X)	A	Dividend	J	T					
33. Ishares S&P 500 Growth ETF (IVW)	A	Dividend	J	T	Sold (part)	07/22/21	J		
34. Ishares S&P 500 Value ETF (IVE)	A	Dividend	J	T					

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D =$5,001 - $15,000
E =$15,001 - $50,000
F =$50,001 - $100,000
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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
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35. Vanguard FTSE Developed Mkts ETF (VEA)	A	Dividend	J	T					
36. Vanguard Intl Equity Index Fds Ftse Emerging Mkts ETF (VWO)	A	Dividend	J	T					
37. Vanguard Mid Cap ETF (VO)	A	Dividend	J	T					
38. Account #3 (H)									
39. Invesco Tr II Emerging Mkts Sovereign ETF (PCY)	A	Dividend	J	T					
40. Ishares Russell 2000 ETF (IWM)	A	Dividend	J	T	Sold (part)	07/22/21	J	A	
41. Ishares Core MSCI ETF (IEFA)	A	Dividend	J	T	Buy	07/22/21	J		
42. Ishares Core S&P Tot U.S. Stock Mkt ETF (ITOT)	A	Dividend	J	T	Buy	07/22/21	J		
43. Ishares Core S&P Mid ETF (IJH)	A	Dividend	J	T					
44. Ishares Core S&P 500 Index Fd (IVV)	A	Dividend	J	T					
45. Ishares Core U.S. Aggregate Bond ETF (AGG)	A	Dividend	J	T	Buy (add'l)	01/06/21	J		
46.					Sold (part)	07/22/21	J		
47. Ishares Iboxx High Yield Corp Bond ETF (HYG)	A	Dividend	J	T					
48. Ishares Inc Core MSCI Emerging Mkts (IEMG)	A	Dividend	J	T	Buy	07/22/21	J		
49. Ishares S&P 500 Growth ETF (IVW)	A	Dividend	J	T	Sold (part)	07/22/21	J	A	
50. Ishares S&P 500 Value ETF (IVE)	A	Dividend	J	T	Sold (part)	07/22/21	J	A	
51. Vanguard FTSE Developed Mkts ETF (VEA)	A	Dividend	J	T					

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52. Vanguard Intl Equity Index Fds Ftse Emerging Mkts ETF (VWO)	A	Dividend	J	T					
53. Vanguard Mid Cap ETF (VO)	A	Dividend	J	T					
54. Account #4 (H)									
55. Vanguard Target Retirement 2035 Trust		None	K	T					
56. Account #5 (H)									
57. Vanguard Target Retirement 2035 Trust		None	L	T					
58. Account #6 (H)									
59. Wells Fargo Bank Standard Deposit (cash)	A	Interest	O	T					
60. Goldman Sachs Activebeta US Large Cap Equity ETF (GSLC)	A	Dividend			Sold	08/09/21	J	B	
61. Invesco Optimum Divsified Commodity Strategy No K-1 ETF (PDBC)		None			Sold	08/09/21	J	B	
62. Ishares PFD & Income Secs ETF (PFF)	A	Dividend			Sold	03/17/21	J	A	
63. Ishares Core S&P Tot U.S. Stock Mkt ETF (ITOT)	A	Dividend			Buy (add'l)	03/17/21	J		
64.					Buy (add'l)	07/20/21	J		
65.					Sold	08/09/21	K	C	
66. Ishares Core S&P 500 Index Fd ETF (IVV)	A	Dividend			Sold (part)	01/29/21	J	A	
67.					Sold (part)	06/08/21	J	A	
68.					Sold	08/09/21	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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69. Ishares Core Total USD Bond Market ETF (IUSB)	A	Dividend			Buy (add'l)	01/29/21	J		
70.					Buy (add'l)	03/17/21	J		
71.					Buy (add'l)	06/08/21	J		
72.					Buy (add'l)	07/20/21	J		
73.					Sold	08/09/21	L		
74. Ishares Core U.S. Aggregate Bond ETF (AGG)	A	Dividend			Sold (part)	01/29/21	J		
75.					Sold	08/09/21	L		
76. Ishares Iboxx High Yield Corp Bond ETF (HYG)	A	Dividend			Sold	03/17/21	J	A	
77. Ishares JP Morgan USD Emerging Mkts ETF (EMB)	A	Dividend			Sold	08/09/21	J		
78. Ishares MBS ETF (MBB)	A	Dividend			Sold	07/20/21	J		
79. Vanguard Intermediate Term Corp Bond ETF (VCIT)	A	Dividend			Sold	08/09/21	J		
80. Vanguard Total Bond Market ETF (BND)	A	Dividend			Sold	07/20/21	J		
81. Xtrackers USD High Yield Corp Bond ETF (HYLB)	A	Dividend			Buy (add'l)	03/17/21	J		
82.					Sold	08/09/21	J	A	
83. Account #7 (H)									
84. Invesco QQQ Tr ETF (QQQ)	A	Dividend			Sold	08/09/21	J	D	
85. Invesco Tr II S&P 500 Low Volatility (SPLV)	A	Dividend			Sold	08/09/21	J	A	

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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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86. Ishares Core S&P Smallcap ETF (IJR)	A	Dividend			Sold	08/09/21	J	B	
87. Ishares Edge MSCI Min Vol Emerg Mkts ETF (EEMV)	A	Dividend			Sold	08/09/21	J	A	
88. SPDR Dow Jones Indl Avg ETF Tr (DIA)	A	Dividend			Sold	08/09/21	J	A	
89. SPDR S&P 500 Trust ETF (SPY)	A	Dividend			Sold	08/09/21	J	C	
90. Vanguard Dividend Appreciation ETF (VIG)	A	Dividend			Sold	08/09/21	J	C	
91. Vanguard FTSE Developed Mkts ETF (VEA)	A	Dividend			Sold	08/09/21	J	B	
92. Vanguard Index Fds S&P 500 ETF (VOO)	A	Dividend			Sold	08/09/21	J	C	
93. Vanguard Mid Cap ETF (VO)	A	Dividend			Sold	08/09/21	J	D	
94. Vanguard Russell 1000 ETF (VONE)	A	Dividend			Sold	08/09/21	J	D	
95. Vanguard Small Cap ETF (VB)	A	Dividend			Sold	08/09/21	J	C	
96. AMG Times Square Mid Cap Growth Fund Cl N (TIMDPX)		None			Sold	08/09/21	J	B	
97. Blair William FDS Intl Growth Fd Cl I (BIGIX)		None			Sold	08/09/21	J	C	
98. Carillon Ser Tr Eagle Small Cap Growth Fd Cl I (HSIIX)		None			Sold	08/09/21	J	A	
99. Advisors Inner Circle Fd Cambiar Oppty Fd Instl Cl (CAMWX)		None			Sold	08/09/21	J	B	
100. Delaware Group Equity Fds II-Value Fd Instl Cl (DDVIX)	A	Dividend			Sold	08/09/21	J	B	
101. First Eagle Funds Sogen Overseas Fd Cl I (SGOIX)		None			Sold	08/09/21	J	A	
102. Hancock John Cap Ser Classic Value Fd Cl I (JCVIX)		None			Sold	08/09/21	J	B	

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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				
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. Hotchkis & Wiley Fds Mid Cap Value Fd Cl I (HWMIX)		None			Sold	08/09/21	J	A	
104. American Funds Washington Mutual Investors Fund F-2 (WMFFX)	A	Dividend			Sold	08/09/21	J	B	
105. Invesco Oppenheimer Developing Markets Fund Y (ODVYX)		None			Sold	08/09/21	J	B	
106. Lazard Emerging Market Equity Portfolio Institutional (LZEMX)		None			Sold	08/09/21	J	A	
107. Lord Abbet High Yield Fund Class F (LHYFX)	A	Dividend			Sold	08/09/21	J	A	
108. MainStay Large Cap Growth Fund I (MLAIX)		None			Sold	08/09/21	J	C	
109. Wells Fargo Emerging Growth Fund I (WEMIX)		None			Sold	08/09/21	J	B	
110. Victory Sycamore Small Company Opportunity Fund I (VSOIX)		None			Sold	08/09/21	J	C	
111. Voya Large-Cap Growth Fund I (PLCIX)		None			Sold	08/09/21	J	C	
112. Account #8 (H)									
113. Wells Fargo Expanded Bank Deposit (cash)	A	Interest			Closed	08/11/21	N		
114. Goldman Sachs US Large Cap Equity ETF (GSLC)	A	Dividend			Sold	08/09/21	J	B	
115. Invesco Optimum Divsified Commodity Strategy No K-1 ETF (PDBC)		None			Sold	08/09/21	J	B	
116. Ishares PFD & Income Secs ETF (PFF)	A	Dividend			Sold	03/17/21	J	A	
117. Ishares Core S&P Tot U.S. Stock Mkt ETF (ITOT)	A	Dividend			Buy (add'l)	03/17/21	J		
118.					Buy (add'l)	07/20/21	K		
119.					Sold	08/09/21	K	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
Kelly, Timothy J.	06/30/2022

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)
120. Ishares Core S&P 500 Index Fd (IVV)	A	Dividend			Sold (part)	01/29/21	J	A	
121.					Sold (part)	06/08/21	J	A	
122.					Sold	08/09/21	J	B	
123. Ishares Core Total USD Bond Market ETF (IUSB)	A	Dividend			Buy (add'l)	01/29/21	J		
124.					Buy (add'l)	03/17/21	J		
125.					Buy (add'l)	06/08/21	J		
126.					Buy (add'l)	07/20/21	J		
127.					Sold	08/09/21	L		
128. Ishares Core U.S. Aggregate Bond ETF (AGG)	B	Dividend			Sold (part)	01/29/21	J	A	
129.					Sold	08/09/21	M		
130. Ishares Iboxx High Yield Corp Bond ETF (HYG)	A	Dividend			Sold	03/17/21	J	A	
131. Ishares JP Morgan USD Emerging Mkts ETF (EMB)	A	Dividend			Sold	08/09/21	J		
132. Ishares MBS ETF (MBB)	A	Dividend			Sold	07/20/21	J		
133. Vanguard Intermediate Term Corp Bond ETF (VCIT)	A	Dividend			Sold	08/09/21	J		
134. Vanguard Total Bond Market ETF (BND)	A	Dividend			Sold	07/20/21	J		
135. Xtrackers USD High Yield Corp Bond ETF (HYLB)	A	Dividend			Buy (add'l)	03/17/21	J		
136.					Sold	08/09/21	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
Kelly, Timothy J.	06/30/2022

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)
137. Account #9 (H)									
138. American Funds The Growth Fund of America 529-A (CGFAX)	D	Dividend	L	T					
139. American Funds The New Economy Fund 529-A (CNGAX)	C	Dividend	L	T	Sold (part)	06/09/21	J		
140. American Funds New Perspective Fund 529-A (CNPAX)	C	Dividend	L	T					
141. American Funds New World Fund 529-A (CNWAX)	B	Dividend	K	T					
142. American Funds SmallCap World Fund 529-A (CSPAX)	C	Dividend	L	T					
143. American Funds College 2027 Fund 529-A (CSTAX)	C	Dividend	L	T					
144. Account #10 (H)									
145. American Funds The Growth Fund of America 529-A (CGFAX)	B	Dividend	K	T					
146. American Funds The New Economy Fund 529-A (CNGAX)	A	Dividend	J	T	Sold (part)	06/09/21	J		
147. American Funds New Perspective Fund 529-A (CNPAX)	A	Dividend	J	T					
148. American Funds New World Fund 529-A (CNWAX)	A	Dividend	J	T					
149. American Funds SmallCap World Fund 529-A (CSPAX)	B	Dividend	J	T					
150. American Funds College 2030 Fund 529-A (CTHAX)	C	Dividend	K	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		

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

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value, per page 42 of the filing instructions.

Name of Person Reporting	Date of Report
Kelly, Timothy J.	06/30/2022

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/ Timothy J. 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. § 104)

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544