AO 10*
Rev. 1/2022

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
LENARD, JOAN A.	DISTRICT COURT, SOUTHERN DISTRICT OF FL	01/23/2023
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 SENIOR	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
400 NORTH MIAMI AVENUE SUITE 12-1 MIAMI, FLORIDA 33128		

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. 1996	STATE OF FLORIDA RETIREMENT PLAN (VESTED)
2. 1996	STATE OF FLORIDA DEFERRED COMPENSATION ACCOUNT
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.	2021	FLORIDA RETIREMENT SYSTEM-VESTED PENSION	$58,582.86
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.	2021	CITY OF NORTH MIAMI BEACH DEFINED BENEFIT PLAN
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.	GROVE BANK AND TRUST	WAREHOUSE PROPERTIES,NORTH MIAMI BEACH, FLORIDA	P1
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
LENARD, JOAN A.	01/23/2023

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	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)	
1. WELLS FARGO BANK#1	A	Interest	M	T					
2. WELLS FARGO BANK #2	A	Interest	M	T					
3. WELLS FARGO BANK #3	A	Interest	O	T					
4. WELLS FARGO BANK #4	C	Interest	N	T					
5. TRUIST BANK	A	Interest	K	T		09/13/21			SEE PART VIII.
6. 1ST BANK	C	Interest	O	T					
7. AMERANT BANK	C	Interest			Closed	12/28/21	O		
8. AMERICAN EXPRESS BANK	B	Interest			Closed	12/21/21	O		
9. CAPITAL ONE	B	Interest			Closed	10/14/21	N		
10. CITY NATIONAL BANK	A	Interest	J	T					
11. VANGUARD MONEY MARKET ADM	A	Dividend	N	T		12/31/21			SEE PART VIII.
12. VANGUARD MUNICIPAL MONEY MARKET FUND	B	Dividend	N	T					
13. VANGUARD LONG TERM TAX-EXMPT FUND	C	Dividend	M	T					
14. VANGUARD HIGH YIELD TAX-EXEMPT FUND	C	Dividend	M	T					
15. NORTHEAST INV. TRUST	D	Dividend	M	T					
16. GROVE BANK & TRUST	B	Interest	K	T					
17. JP MORGAN SAVINGS(X)	A	Interest	O	T	Open	10/27/21	M		

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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☐ NONE *(No reportable income, assets, or transactions.)*

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18.										
19.	STOCKS/SECURITIES									
20.	DTE ENERGY/DTE -COMMON	D	Dividend	M	T		07/01/21			`SEE PART VIII.
21.	DT MIDSTREAM(X)-COMMON	A	Dividend	K	T		07/01/21			SPINOFF: LINE 20
22.	DT ENERGY/ DTE- COMMON (Y)									
23.	DT MIDSTREAM(X)-COMMON(Y)									SPINOFF LINE 22
24.	NI SOURCE-COMMON	A	Dividend	J	T					
25.	NI SOURCE-COMMON (Y)									
26.	GYRODYNE CO'S.-COMMON	A	Dividend	J	T					
27.	AT&T-COMMON	B	Dividend	K	T	Buy (add'l)	11/19/21	J		
28.	AT &T-COMMON(Y)									
29.	BOEING-COMMON(Y)									
30.	BOEING- COMMMON	B	Dividend	K	T					
31.	CMS ENERGY-COMMON	B	Dividend	L	T					
32.	CONS. EDISON-COMMON	A	Dividend	K	T					
33.	BANK OF AMERICA-COMMON (Y)									
34.	BANK OF AMERICA-COMMON	B	Dividend	L	T					

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35. VISTRA -COMMON	A	Dividend	J	T					
36. DUFF & PHELEPS-COMMON	A	Dividend	K	T					
37. NEXTERA ENERGY- COMMON	A	Dividend	M	T	Buy (add'l)	09/27/21	J		
38. NEXTERA ENERGY-COMMON (Y)									
39. INTEL CORP.-COMMON	B	Dividend	L	T					
40. DREYFUS MUNICIPAL INCOME-COMMON	A	Dividend	J	T					
41. WESTERN ASSET MANAGED MUNICIPAL FUND,INC.	A	Dividend	J	T					
42. MERCK-COMMON	A	Dividend	K	T					
43. MERCK-COMMON (Y)									
44. VODAPHONE-COMMON	A	Dividend	J	T					
45. VODAPHONE-COMMON (Y)									
46. VERIZON-COMMON	B	Dividend	K	T					
47. VERIZON COMM.-COMMON (Y)									
48. ENTERGY CORP.-COMMON (Y)									
49. CENTURYLINK,INC.-COMMON	A	Dividend	J	T					
50. AT&T-COMMON	A	Dividend	J	T					
51. ORACLE-COMMON	C	Dividend	N	T					

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52. BBX CAPITAL CORP-COMMON (Y)									
53. BLACKROCK MUNICIPAL INCOME TRUST (Y)									
54. BLACKROCK MUNICIPAL INCOME TRUST	A	Dividend	L	T					
55. COMCAST CORP.-COMMO N (Y)									
56. EATON VANCE MUNICIPAL INCOME TRUST (Y)									
57.									
58. INVESTMENT PROJECTS									
59. PIER ONE IMPT/OCALA,FL	D	Rent			Sold	06/16/21	O	G	
60. COMM'L DEVLP/LEHMN,NORTH (Y) MIAMI BEACH,FL									
61. NMB CMMRC CTR.LLC,NORTH MIAMI BEACH,FL (Y)									
62. SELECT FUNDING ASSOC.,FL	A	Interest	J	T					
63.									
64. RETIREMENT ACCOUNTS									
65. OPPENHEIMER FUNDS:M/MF # 1	B	Interest	K	T					
66. OPPENHEIMER FUNDS:GNMA # 2	C	Dividend	L	T					
67. ALLSPRING OPPORTUNITY-ADM	A	Int./Div.	L	T		11/01/21			SEE PART VIII.
68. ALLSPRING CLASSIC VALUE-ADM	B	Int./Div.	K	T		11/01/21			SEE PART VIII.

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69.	FEDERATED KAUFMANN FUND	D	Dividend	L	T					
70.	FIDELITY (IRA)	D	Interest	L	T					
71.	LADENBURG THALMANN FINANCIAL-COMMON SERVICES,INC-COMMON		None	J	T					
72.	OPKO HEALTH-COMMON		None	J	T					
73.	OPKO HEALTH,INC.-COMMON (Y)									
74.	GENERAL ELECTRIC-COMMON	A	Dividend	J	T					
75.	GENERAL ELECTRIC-COMMON (Y))									
76.	ENERGY TRANSFER PARTNERS-COMMON	A	Dividend	J	T					
77.	CONOCO PHILLIPS-COMMON	A	Dividend	J	T					
78.	PHILLIPS 66-COMMON	A	Dividend	J	T					
79.	FL DEFERRED.COMP.PLN LARGE -CAP STOCKS- MSIF GrP	B	Interest	M	T					
80.	FL DEFERRED COMP. PLAN BONDS-DODGE COX INC.	A	Int./Div.	K	T					
81.	FL DEFERRED COMP. PLAN FIXED ASSETS/CASH TOTAL-NRS FLORIDA FIXED FUND	A	Int./Div.	K	T					
82.	FL DEFERRED COMP. PLAN ASSET ALLOCATION-NW INV DEST MOD SVC	B	Int./Div.	L	T					
83.	MISSION SQUARE 457 DEFD COMP. STBL VLUE /CASH MGM /PLUS FND MANAGEMENT	A	Int./Div.	L	T		11/01/21			SEE PART VIII.
84.	MISSION SQUARE 457 DEFERRED COMP. BOND- LOOMIS BOND INSTL	A	Int./Div.	M	T		11/01/21			SEE PART VIII.

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	
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85. MISSION SQUARE 457 DEFERRED COMP. AMS 2020 TRGT DTE RET	A	Int./Div.	N	T		11/01/21			SEE PART VIIII.
86. MISSION SQUARE 457 DEFERRED COMP. AM FUNDS 2010 TRGT DT RET R3	A	Int./Div.	M	T		11/01/21			SEE PART VIII.
87. MISSION SQUARE 457 DEFERRED COMP. AM FUNDS 2010 TRGT DATE RET R3	A	Int./Div.	M	T		11/01/21			SEE PART VIII..
88. MISSION SQUARE 457 DEFERRED COMP.	A	Int./Div.	M	T		11/01/21			SEE PART VIII.
89. MISSION SQUARE 457 DEFERRED COMP. VANGUARD TOTAL STOCK MKT IDX	A	Int./Div.	O	T		11/01/21			SEE PART VIII.
90. FIDELITY ANNUITYVIP ASSET MANAGER	A	Int./Div.	M	T					
91. FIDELITY ANNUITY VIP CONTRAFUND	A	Int./Div.	N	T					
92. FIDELITY ANNUITY VIP EQUITY INCOME	A	Int./Div.	N	T					
93. FIDELITY ANNUITY VIP HIGH INCOME	A	Int./Div.	L	T					
94. FIDELITY ANNUITY VIP INV GRADE BOND	A	Int./Div.	L	T					
95. FIDELITY ANNUITY VIP OVERSEAS	A	Int./Div.	L	T					
96. FIDELITY ANNUITY VIP HEALTHCARE	A	Int./Div.	K	T					
97. OPPENHEIMER FDS:M/MF #1	B	Interest	K	T					
98. OPPENHEIMER FDS:GMMA #2	B	Dividend	K	T					
99. FIDELITY CASH RES.	A	Interest	J	T					
100. ENTERGY CORP.-COMMON	A	Dividend	J	T					

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101. EDISON INT.-COMMON (Y)									
102. CISCO-COMMON	D	Dividend	O	T					
103. HEWLETT-PACKARD- COMMON	A	Dividend	J	T					
104. HEWLETT -PACKARD ENTERPRISE-COMMON	A	Dividend	J	T					
105. GENERAL ELECTRIC-COMMON	A	Dividend	J	T					
106. DISNEY CORP.-COMMON	A	Dividend	J	T					
107.									
108. OTHER ACCOUNTS									
109. CON.EDISON-COMMON	A	Dividend	K	T					
110. WENDY'S ARBY GROUP,INC-COMMON. (Y)									
111. RESTAURANT BRANDS INTL. -COMMON(Y)									
112. U.S.SAVINGS BONDS	B	Interest	K	T					
113. ISRAEL SAVINGS BONDS	A	Interest	K	W					
114. COCA COLA EUROPEAN ENTP.-COMMON (Y)									
115. BBX CAPITAL CORP.-COMMON		None	K	T					
116. VIACOM-COMMON	A	Dividend	K	T					
117. CBS-COMMON (Y)									

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)
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Name of Person Reporting	Date of Report
LENARD, JOAN A.	01/23/2023

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.)*

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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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118. OUTFRONT MEDIA INC.- COMMON (Y)									
119. SEMPRA ENERGY-COMMON (Y)									
120. DISNEY CORP.-COMMON (Y)									
121. BP AMOCO -COMMON (Y)									
122. BP AMOCO- COMMON	A	Dividend	J	T					
123. DAIMLER AG-COMMON (Y)									
124. EXELON CORP.-COMMON (Y)									
125. EVERSOURCE ENERGY-COMMON (Y)									
126. PG & E CORP.-COMMON(Y)									
127. CISCO -COMMON (Y)									
128. PFIZER-COMMON	B	Dividend	K	T					
129. CITIGROUP-COMMON (Y)									.
130. BCE,INC.-COMMON	A	Dividend	J	T					
131. WASTE MANAGEMENT-COMMON	A	Dividend	K	T					
132. DUKE ENERGY-COMMON	B	Dividend	K	T					
133. ENTERPRISE PRODUCTS PARTNERS-COMMON (Y)									
134. CENTERPOINT ENERGY-COMMON (Y)									

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135. GLAXOSMITHKLINE -COMMON	A	Dividend	J	T					
136. NCR CORP-COMMON (Y)									
137. TERADATA CORP.-COMMON (Y)									
138. MICROSOFT CORP.-COMMON(Y)									
139. NUVEEN MUNI CRDT INCME FND (Y)									
140. ENTERGY TRANSFER -COMMON	A	Dividend	J	T					
141. TEEKAY TANKERS,INC.-COMMON	A	Dividend	J	T					
142. NEW YORK COMMUNITY BANK-COMMON	A	Dividend	J	T					
143. NEW YORK COMMUNITY BANK CORP.-COMMON (Y)									
144. VALERO ENERGY CORP.-COMMON	A	Dividend	J	T					
145. BERKSHIRE HATHAWAY /B-COMMON (Y)									
146. ANNALY CAPITAL MANAGEMENT, INC.-COMMMON(X)	A	Dividend	J	T					
147. CARDRFREEPORT McMORAN COOPER&GOLD,INC-COMMON (Y)									
148. ARCOS DORADOS HOLDINGS,INC-COMMON(Y)									
149. ARCOS DORADOS HOLDINGS,INC-COMMON	A	Dividend	J	T					
150. PROCTOR&GAMBLE CORP.-COMMON	A	Dividend	K	T					
151. CHESAPEAKE ENERGY CORP.-COMMON	A	Dividend	J	T					

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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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152. KRAFT HEINZ CORP.-COMMON	A	Dividend	J	T					
153. KRAFT HEINZ CO.-COMMON (Y)									
154. MONDELEZ INTL.,INC.-COMMON	A	Dividend	K	T					
155. FIRST ENERGY CORP-COMMON (Y)									
156. ZOETIS,INC.-COMMON	A	Dividend	K	T					
157. ZOETLS,INC.-COMMON (Y)									
158. COLGATE-PALMOLIVE CO.-COMMON (Y)									
159. MASTERCARD INC.-COMMON (Y)									
160. NEXTERA ENERGY PARTNERS-COMMON	A	Dividend	K	T					
161. WALGREENS BOOTS ALLIANCE INC.-COMMON	A	Dividend	K	T					
162. CHEVRON CORP.-COMMON	A	Dividend	J	T					
163. ROYAL DUTCH SHELL PLC.COMMON	A	Dividend	J	T					
164. SOUTHERN COMPANY-COMMON	A	Dividend	J	T					
165. SOUTHERN COMPANY-COMMON (Y)									
166. AMERICAN ELECTRIC POWER-COMMON	A	Dividend	J	T					
167. PPL CORP.-COMMON (Y)									
168. KINDER MORGAN INC.-COMMON (Y)									

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
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169. KINDER-MORGAN INC.-COMMON	A	Dividend	J	T					
170. SCHLUMBERGER LTD.-COMMON (Y)									
171. EXXON MOBIL CORP.-COMMON (Y)									
172. EXXON MOBILE- COMMON	B	Dividend	K	T					
173. ENBRIDGE,INC.- COMMON	A	Dividend	J	T					
174. APPLE,INC-COMMON (Y)									
175. APPLE,INC-COMMON	A	Dividend	K	T	Buy (add'l)	09/20/21	J		
176. NIKE,INC- COMMON	A	Dividend	K	T					
177. ABBOTT LABORATORIES-COMMON	A	Dividend	K	T					
178. DOW DUPONT,INC	A	Dividend	J	T					
179. BRISTOL-MYERS SQUIB-COMMON (Y)									
180. PIMCO MUNI INCOME FUND-COMMON (Y)									
181. PUTNAM MANAGED MUNI INCOME FUND (Y)									
182. EATON VANCE MUNICIPAL BOND FUND (Y)									
183. CAMPBELL SOUP,INC.-COMMON (Y)									
184. RITE AID CORP.-COMMON (Y)									
185. AES CORP.-COMMON (Y)									

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
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186. SPRINT-COMMON		None	J	T					
187. PINNACLE WEST CAPITAL CORP-COMMOM	A	Dividend	J	T					
188. KIMBERLY CLARK-COMMON	A	Dividend	J	T					
189. NUVEEN DIVIDEND ADVANTAGE MUNI FUND (Y)									
190. GENERAL MILLS-COMMON	A	Dividend	J	T					
191. GENERAL MILLS-COMMON (Y)									
192. DOMINION ENERGY-COMMON(Y)									
193. DOMINION ENERGY-COMMON	A	Dividend	J	T					
194. CATERPILLAR-COMMON (Y)									
195. CORTEVA,INC -COMMON	A	Dividend	J	T					
196. DOW,INC.- COMMON	A	Dividend	J	T					
197. DUPONT--COMMON	A	Dividend	J	T					
198. CVS HEALTH CORP-COMMON (Y)									
199. CVS HEALTH CORP-COMMON	A	Dividend	K	T					
200. CARDINAL HEALTH-COMMON (Y)									
201. CARNIVAL CORP-COMMON (Y)									
202. FOX CORP-COMMON (Y)									

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203. ABBVIE, INC.-COMMON (Y)									
204. ENOCHIAN BIOSCIENCES INC-COMMON (Y)									
205. KROGER-COMMON(Y)									
206. PIMCO CORPORATE OPPORTUN-COMMON (Y)									
207. COCA COLA COMPANY(X)	A	Dividend	K	T	Buy	02/04/21	K		
208. COCA COLA COMPANY- COMMON (Y)									
209. WILLIAMS COMPANIES-COMMON (Y)									
210. AMERICAN EXPRESS CO.-COMMON (Y)									
211. BLUEGREEN VACATION HOLDINGS - COMMON(X)		None	K	T	Buy	07/12/21	K		
212. BLUEGREEN VACATIONS HOLDINGS-COMM0N(Y)									
213. VIATRIS INC-COMMON(X)	A	Dividend	J	T	Buy	04/01/21	J		
214. LUMEN TECHNOLOGIES-COMMON(X)	A	Dividend	J	T	Buy	10/01/21	J		
215. LUMEN TECHNOLOGIES (Y)									
216. NY COMNTY BANK CORP-COMMON(X)	A	Dividend	J	T	Buy (add'l)	06/02/21	J		
217. NY COMNTY BANK (Y)									
218. CATERPILLAR-COMMON	A	Dividend	K	T					
219. EDISON, INTL-COMMON	A	Dividend	J	T					

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220. MASTERCARD- COMMON	A	Dividend	J	T					
221. EATON VANCE MUN INCOME TRUST	A	Dividend	J	T					
222. EATON VANCE INVESTMENT TRUST	A	Dividend	J	T					
223. NUVEEN MUNI CREDIT INC FUND	A	Dividend	K	T					
224. NUVEEN DIVIDEND ADVANTAGE MUNI FUND	A	Dividend	K	T					
225. PIMPCO MUNICIPAL INCOME FUND	A	Dividend	L	T					
226. PUTNAM MANAGED MUNI INCOME FUND	A	Dividend	J	T					
227. WESTERN MANAGED MUNICIPAL FUND (Y)									

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

PART VIII: LINE 5:BBT NAME CHANGE TO TRUIST BANK
LINE 11: VANGUARD CASH RESERVEN FEDERAL MMKT NAME CHANGE TO VANGUARD MMKT ADM
LINE 20: DETROIT EDISON NAME CHANGE TO DTE ENERGY/DTE
LINE 66: WELLS FARGO LARGE CAP FUNDS INTRINSIC NAME CHANGE TO ALLSPRING OPPORTUNITY-ADM
LINE 67: WELLS FARGO SMALL MID CAP FUNDS NAME CHANGE TO ALLSPRING CLASSIC VALUE-ADM
LINE 82: ICMA RC NAME CHANGE TO MISSION SQUARE
LINE 83: ICMA RC NAME CHANGE TO MISSION SQUARE
LINE 84: ICMA RC NAME CHANGE TO MISSIONSQUARE
LINE 85: ICMA RC NAME CHANGE TO MISSIONSQUARE
LINE 86: ICMA RC NAME CHANGE TO MISSION SQUARE
LINE 87: ICMA RC NAME CHANGE TO MISSION SQUARE
LINE 88: ICMA RC NAME CHANGE TO MISSIONSQUARE

Name of Person Reporting	Date of Report
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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/ JOAN A. LENARD

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