AO 10*
Rev. 1/2022

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

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	11/8/2024
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. DISTRICT JUDGE SENIOR	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2023 **to** 12/31/2023
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.	2023	FLORIDA RETIREMENT SYSTEM-VESTED PENSION	$62,370.00
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.	2023	CITY OF NORTH MIAMI BEACH DEFINED BENEFIT PLAN
2.	2023	REQUIRED MINIMUM DISTRIBUTION (RMD) RETIREMNT ACCOUNTS
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.	11/8/2024

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		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.	WELLS FARGO BANK#1	A	Interest	M	T					
2.	WELLS FARGO BANK #2	A	Interest	L	T					
3.	WELLS FARGO BANK #3	A	Interest	K	T					
4.	WELLS FARGO BANK #4	A	Interest	K	T					
5.	CITY NATIONAL BANKi	A	Interest			Closed	03/16/23	J		SEE VIII
6.	VANGUARD MONEY MARKET ADM	C	Dividend			Closed	03/20/23	M		SEE VIII
7.	VANGUARD MUNICIPAL MONEY MARKET FUND	A	Dividend			Closed	03/20/23	N		SEE VIII
8.	VANGUARD LONG TERM TAX-EXMPT FUND	C	Dividend			Closed	03/20/23	L		SEE VIII
9.	VANGUARD HIGH YIELD TAX-EXEMPT FUND	C	Dividend			Closed	03/20/23	M		SEE VIII
10.	NORTHEAST INV. TRUST	C	Dividend	L	T	Redeemed (part)	03/15/23	K		
11.	GROVE BANK & TRUST	A	Interest	J	T					
12.	JP MORGAN #1 - CASH EQUIVALENT	E	Int./Div.	P1	T					
13.	JP MORGAN #2 - CASH EQUIVALENT	C	Interest	L	T					
14.	JP MORGAN #3 - CASH EQUIVALENT	E	Interest	O	T					
15.	JP MORGAN #4 - CASH EQUIVALENT	E	Interest	O	T					
16.	JP MORGAN #5 - CASH EQUIVALENT	E	Interest	O	T					
17.	JP MORGAN #6 - CASH EQUIVALENT	E	Interest	O	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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18. JP MORGAN IRA	C	Int./Div.	N	T					
19. JP MORGAN IRA HOLDINGS/LINES 24-36:									
20. JP MORGAN IRA/CASH EQUIVALENT	A	Interest	M	T					
21. JP MORGAN INVESTMENT(x) SEE LINES 22 & 23	F	Int./Div.	P1	T	Open	03/20/23	O		
22. --JPM 100% US TREAS FD-PREMIER (VHPXX)	E	Interest	N	T					
23. - JPM CHASE BK-USD (TD0117-ZB-1)	F	Interest	P1	T					
24. INVESCO SHORT BOND-A	B	Interest	M	T	Distributed (part)	12/01/23	J		SEE VIII
25. BANK OF AMERICA-COMMON	C	Dividend	J	T					
26. CONOCO PHILLIPS-COMMON	A	Dividend	J	T					
27. KIMBERLY-CLARK CORP.-COMMON	A	Dividend	J	T					
28. KRAFT HEINZ-COMMON	A	Dividend	J	T					
29. MONDELEZ INTL-COMMON	A	Dividend	J	T					
30. NY COMMUNITY BANK-COMMON	A	Dividend	J	T					
31. PHILLIPS 66-COMMON	A	Dividend	J	T					
32. PINNACLE WEST CAPITAL-COMMON	A	Dividend	J	T					
33. THE SOUTHERN COMPANY-COMMON	A	Dividend	J	T					
34. WALT DISNEY COMPANY-COMMON	A	Dividend	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	
	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. ALLSPRING OPPORTUNITY ADMIN	A	Int./Div.	L	T					
36. ENBRIDGE-COMMON	A	Dividend	J	T					
37. ALLSPRING CLASSIC VALUE ADMIN	A	Int./Div.	K	T					
38. STOCKS/SECURITIES									
39. DTE ENERGY/DTE -COMMON	D	Dividend	M	T					
40. DT MIDSTREAM-COMMON	C	Dividend	L	T					
41. NI SOURCE-COMMON	A	Dividend	J	T					
42. GYRODYNE CO'S.-COMMON	A	Dividend	J	T					
43. AT&T-COMMON	B	Dividend	K	T					
44. BOEING- COMMMON	B	Dividend	L	T					
45. CMS ENERGY-COMMON	B	Dividend	L	T					
46. CONS. EDISON-COMMON	A	Dividend	K	T					
47. BANK OF AMERICA-COMMON	A	Dividend	K	T					
48. VISTRA -COMMON	A	Dividend	J	T					
49. DUFF & PHELEPS-COMMON	A	Dividend	K	T					
50. NEXTERA ENERGY- COMMON	C	Dividend	L	T					
51. INTEL CORP.-COMMON	B	Dividend	L	T					

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52. DREYFUS MUNICIPAL INCOME-COMMON	A	Dividend	J	T					
53. WESTERN ASSET MANAGED MUNICIPAL FUND,INC.	A	Dividend	J	T					
54. MERCK-COMMON	A	Dividend	K	T					
55. VODAPHONE-COMMON	A	Dividend	J	T					
56. VERIZON-COMMON	B	Dividend	K	T					
57. CENTURYLINK,INC.-COMMON	A	Dividend	J	T					
58. AT&T-COMMON	A	Dividend	J	T					
59. ORACLE-COMMON	D	Dividend	N	T					
60. BLACKROCK MUNICIPAL INCOME TRUST	B	Dividend	L	T					
61. SELECT FUNDING ASSOC.,FL	A	Interest	J	T					
62.									
63. RETIREMENT ACCOUNTS									
64. FEDERATED KAUFMANN FUND	D	Dividend	L	T					
65. FIDELITY (IRA)	C	Int./Div.	L	T	Distributed (part)	04/22/23	J		
66. FIDELITY IRA HOLDINGS LINES 68- 77									
67. FIDELITY CASH EQUIVALENT	A	Interest	L	T					
68. ABBOTT LABORATORIES-COMMON	A	Dividend	K	T					

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69.	AMERICAN ELECTRIC POWER-COMMON	A	Dividend	J	T					
70.	BCE INC. NEW ISIN#:CAP05534B7604-COMMON		None	J	T					
71.	BANK OF AMERICA CORP.-COMMON	A	Dividend	J	T					
72.	BBX CAPITAL INC.-COMMON		None	J	T					
73.	BLUEGREEN VACATION HOLDINGS CORP.-COMMON	A	Dividend	J	T					
74.	CVS HEALTH CORP.-COMMON	A	Dividend	K	T					
75.	COCA COLA CORP.-COMMON	A	Dividend	K	T					
76.	KRAFT HEINZ COMPANY-COMMON	A	Dividend	J	T					
77.	MONDELEZ INTERNATIONAL INC.-COMMON	A	Dividend	J	T					
78.	CATERPILLAR, INC.-COMMON	A	Dividend	K	T					
79.	CISCO SYSTEMS-COMMON	A	Dividend	N	T					
80.	CORTEVA COMM. INC.- COMMON	A	Dividend	J	T					
81.	WALT DISNEY CO-COMMON	A	Dividend	J	T					
82.	DOW, INC.-COMMON	A	Dividend	J	T					
83.	DUKE ENERGY CORP.-COMMON	A	Dividend	K	T					
84.	DUPONT DE DEMOURS INC. -COMMON	A	Dividend	J	T					
85.	EDISON INTERNATIONAL INC.-COMMON	A	Dividend	J	T					

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86. ENTERGY CORP.-COMMON	A	Dividend	K	T					
87. GENERAL ELECTRIC-COMMON	A	Dividend	J	T					
88. GENERAL MILLS INC..-COMMON	A	Dividend	J	T					
89. GSK PLC-COMMON	A	Dividend	J	T					
90. HALEON PLC-ORDINARY		None	J	T					
91. MICRO FOCUS INTERNATIONAL - COMMON	A	Dividend	J	T					
92. NEXTERA ENERGY INC-COMMON	A	Dividend	J	T					
93. NEXTERA ENERGY PARTNERS-COMMON	B	Dividend	J	T					
94. PFIZER, INC.-COMMON	A	Dividend	K	T					
95. SHELL PLC-ORDINARY	A	Dividend	J	T					
96. SOUTHERN COMPANY-COMMON	A	Dividend	J	T					
97. VERIZON COMMUNICATIONS-COMMON	B	Dividend	K	T					
98. VIATRIS, INC-COMMMON	A	Dividend	J	T					
99. VODAPHONE INC.-COMMON	A	Dividend	J	T					
100. BBX CAPITAL-COMMON		None	J	T					
101. GE HEALTHCARE TECHNOLOGY-COMMON	A	Dividend	J	T					
102. NI SOURCE-COMMON	A	Dividend	J	T					

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103. OPKO HEALTH- COMMON		None	J	T					
104. PROCTOR & GAMBLE CO.- COMMON	A	Dividend	J	T					
105. VIATRIS, INC.-COMMON	A	Dividend	J	T					
106. VERIZON COMM., INC -COMMON	A	Dividend	J	T					
107. WALGREES BOOTS, INC-COMMMON	A	Dividend	J	T					
108. ZOETIS,INC.-COMMON	A	Dividend	J	T					
109. LADENBURG THALMANN FINANCIAL-COMMON SERVICES,INC-COMMON		None	J	T					
110. OPKO HEALTH-COMMONIZE		None	J	T					
111. GENERAL ELECTRIC-COMMON	A	Dividend	J	T					
112. ENERGY TRANSFER PARTNERS-COMMON	A	Dividend	J	T					
113. CONOCO PHILLIPS-COMMON	A	Dividend	J	T					
114. PHILLIPS 66-COMMON	A	Dividend	J	T					
115. FL DEFERRED.COMP.PLN LARGE -CAP STOCKS- MSIF GrP	B	Interest	M	T					
116. FL DEFERRED COMP. PLAN BONDS-DODGE COX INC.	A	Int./Div.	K	T					
117. FL DEFERRED COMP. PLAN FIXED ASSETS/CASH TOTAL-NRS FLORIDA FIXED FUND	A	Int./Div.	K	T					
118. FL DEFERRED COMP. PLAN ASSET ALLOCATION-NW INV DEST MOD SVC	B	Int./Div.	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
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3. Value Method Codes (See Column C2)
Q =Appraisal
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Name of Person Reporting	Date of Report
LENARD, JOAN A.	11/8/2024

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)	
119. MISSION SQUARE 457 DEFD COMP. STBL VLUE /CASH MGM /PLUS FND MANAGEMENT	A	Int./Div.	L	T	Distributed (part)	04/03/23	K		
120. MISSION SQUARE 457 DEFERRED COMP. BOND- LOOMIS BOND INSTL	A	Int./Div.	L	T	Distributed (part)	04/03/23	J		
121. MISSION SQUARE 457 DEFERRED COMP. AMS 2020 TRGT DTE RET R4	A	Int./Div.	M	T	Distributed (part)	04/03/23	J		
122. MISSION SQUARE 457 DEFERRED COMP. AM FUNDS 2010 TRGT DATE RET R4	A	Int./Div.	M	T	Distributed (part)	04/03/23	J		
123. MISSION SQUARE 457 DEFERRED COMP. VANGUARD TOTAL STOCK	A	Int./Div.	O	T	Distributed (part)	04/28/23	L		
124. FIDELITY ANNUITYVIP ASSET MANAGER	A	Int./Div.	M	T					
125. FIDELITY ANNUITY VIP CONTRAFUND	A	Int./Div.	N	T					
126. FIDELITY ANNUITY VIP EQUITY INCOME	A	Int./Div.	N	T					
127. FIDELITY ANNUITY VIP HIGH INCOME	A	Int./Div.	L	T					
128. FIDELITY ANNUITY VIP INV GRADE BOND	A	Int./Div.	L	T					
129. FIDELITY ANNUITY VIP OVERSEAS	A	Int./Div.	L	T					
130. FIDELITY ANNUITY VIP HEALTHCARE	A	Int./Div.	K	T					
131. ENTERGY CORP.-COMMON	A	Dividend	J	T					
132. CISCO-COMMON	D	Dividend	N	T					
133. HEWLETT-PACKARD- COMMON	A	Dividend	J	T					
134. HEWLETT -PACKARD ENTERPRISE-COMMON	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
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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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LENARD, JOAN A.	11/8/2024

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)	
135. GENERAL ELECTRIC-COMMON	A	Dividend	J	T					
136. DISNEY CORP.-COMMON	A	Dividend	J	T					
137.									
138. OTHER ACCOUNTS									
139. CON.EDISON-COMMON	A	Dividend	K	T					
140. U.S.SAVINGS BONDS	B	Interest	K	T					
141. ISRAEL SAVINGS BONDS	A	Interest	K	W					
142. BBX CAPITAL CORP.-COMMON		None	J	T					
143. VIACOM-COMMON	A	Dividend	K	T					
144. BP AMOCO- COMMON	A	Dividend	J	T					
145. PFIZER-COMMON	B	Dividend	K	T					
146. BCE,INC.-COMMON	A	Dividend	J	T					
147. WASTE MANAGEMENT-COMMON	A	Dividend	K	T					
148. DUKE ENERGY-COMMON	B	Dividend	K	T					
149. GLAXOSMITHKLINE -COMMON	A	Dividend	J	T					
150. ENTERGY TRANSFER -COMMON	A	Dividend	J	T					
151. TEEKAY TANKERS,INC.-COMMON	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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LENARD, JOAN A.	11/8/2024

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)	
152. NEW YORK COMMUNITY BANK-COMMON	A	Dividend	J	T					
153. VALERO ENERGY CORP.-COMMON	A	Dividend	J	T					
154. ANNALY CAPITAL MANAGEMENT, INC.-COMMMON	A	Dividend	J	T					
155. ARCOS DORADOS HOLDINGS,INC-COMMON	A	Dividend	J	T					
156. PROCTOR&GAMBLE CORP.-COMMON	A	Dividend	K	T					
157. CHESAPEAKE ENERGY CORP.-COMMON	A	Dividend	J	T					
158. KRAFT HEINZ CORP.-COMMON	A	Dividend	J	T					
159. MONDELEZ INTL.,INC.-COMMON	A	Dividend	K	T					
160. ZOETIS,INC.-COMMON	A	Dividend	K	T					
161. NEXTERA ENERGY PARTNERS-COMMON	A	Dividend	K	T					
162. WALGREENS BOOTS ALLIANCE INC.-COMMON	A	Dividend	J	T					
163. CHEVRON CORP.-COMMON	A	Dividend	J	T					
164. ROYAL DUTCH SHELL PLC.COMMON	A	Dividend	J	T					
165. SOUTHERN COMPANY-COMMON	A	Dividend	J	T					
166. AMERICAN ELECTRIC POWER-COMMON	A	Dividend	J	T					
167. KINDER-MORGAN INC.-COMMON	A	Dividend	J	T					
168. EXXON MOBILE- COMMON	B	Dividend	L	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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☐ 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)	
169. ENBRIDGE,INC.- COMMON	A	Dividend	J	T					
170. APPLE,INC-COMMON	A	Dividend	L	T					
171. NIKE,INC- COMMON	A	Dividend	K	T					
172. ABBOTT LABORATORIES-COMMON	A	Dividend	K	T					
173. DOW DUPONT,INC	A	Dividend	J	T					
174. SPRINT-COMMON		None	J	T					
175. PINNACLE WEST CAPITAL CORP-COMMOM	A	Dividend	J	T					
176. KIMBERLY CLARK-COMMON	A	Dividend	J	T					
177. GENERAL MILLS-COMMON	A	Dividend	J	T					
178. DOMINION ENERGY-COMMON	A	Dividend	J	T					
179. CORTEVA,INC -COMMON	A	Dividend	J	T					
180. DOW,INC.- COMMON	A	Dividend	J	T					
181. DUPONT--COMMON	A	Dividend	J	T					
182. CVS HEALTH CORP-COMMON	A	Dividend	K	T					
183. COCA COLA COMPANY- COMMON	A	Dividend	J	T					
184. BLUEGREEN VACATION HOLDINGS - COMMON	A	Dividend	K	T					
185. VIATRIS INC-COMMON	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)
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LENARD, JOAN A.	11/8/2024

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.)*

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186. LUMEN TECHNOLOGIES-COMMON	A	Dividend	J	T					
187. NY COMNTY BANK CORP-COMMON	A	Dividend	J	T					
188. CATERPILLAR-COMMON	A	Dividend	K	T					
189. EDISON, INTL-COMMON	A	Dividend	J	T					
190. MASTERCARD- COMMON	A	Dividend	K	T					
191. EATON VANCE MUN INCOME TRUST	A	Dividend	J	T					
192. EATON VANCE INVESTMENT TRUST	A	Dividend	K	T					
193. NUVEEN MUNI CREDIT INC FUND	A	Dividend	K	T					
194. NUVEEN DIVIDEND ADVANTAGE MUNI FUND	B	Dividend	K	T					
195. PIMPCO MUNICIPAL INCOME FUND	B	Dividend	K	T					
196. PUTNAM MANAGED MUNI INCOME FUND	A	Dividend	J	T					

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

LINES 6 THROUGH 9: TRANSFERED TO JP MORGAN. (SEE LINE 21).

LINE 5: TRANSFERRED TO EXISTING ACCOUNT AT WELLS FARGO

LINE 24: OPPENHEIMER M/M FUND (LINES 62, 131 ON 2023 ANNUAL REPORT) AND OPPPENHEIMER GNMA FUND (LINES 63, 132 ON ANNUAL 2023 REPORT) INCORRECTLY REPORTED ON 2022 AMENDED ANNUAL REPORT DUE TO PREVIOUS MERGER WITH INVESCO. INVESCO SHORT TERM BOND A AND CASH SWEEP, EACH VALUED -K ($15,001- $50,000) TRANSFERRED TO NEW JP MORGAN IRA ACCOUNT (LINE 18) ON 7/29/2022.

Name of Person Reporting	Date of Report
LENARD, JOAN A.	11/8/2024

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/ 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