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
Liman, Lewis J.	U. S. District Court, Southern District of New York	05/13/2022
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 Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
United States Courthouse 500 Pearl Street New York, NY 10007		

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	Liman Foundation
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.	2003-2019	Cleary Gottlieb Steen & Hamilton LLP - retirement plan with former law firm; firm-managed asset selection
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.	Federal Bar Council	October 22-24, 2021	Saratoga Springs, NY	Bench Bar Retreat & Education	Fall Retreat, hotel
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.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Liman, Lewis J.	05/13/2022

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.	Retirement Account 1 Fidelity Investments (H)									
2.	- Fidelity Investments, Investment Contracts Fund									
3.	- Vanguard Target 2025									
4.	Investment Account 1 Charles Schwab managed by KF Advisors (H)									
5.	- Ishares Russell 2000 IWM	C	Dividend	N	T					
6.	- JH Intl Growth Fund GOGIX	G	Dividend	O	T					
7.	- Edgewood Growth Fund EGFIX		None			Sold	05/24/21	O	G	
8.	- Touchstone Sands Emerging Markets Growth TSEGX	D	Dividend	N	T	Sold (part)	05/24/21	N	G	
9.	- Aristotle Value Equity Fund ARSQX	E	Dividend	O	T	Sold (part)	05/24/21	O	G	
10.	- Ishares Core S&P 500 Index ETF IVV		None			Sold	01/05/21	O	F	
11.	- GQG Partners Global Quality Eqty Inst GQRIX		None			Sold	05/24/21	P1	F	
12.	- Grandeur Peak Intl GISYX	F	Dividend	O	T					
13.	- PIMCO Short Term PTSHX	D	Dividend	O	T	Sold (part)	01/05/21	M		
14.						Sold (part)	04/06/21	N		
15.						Sold	05/24/21	P1	D	
16.						Buy	08/16/21	P1		
17.	- River Canyon Total Return Bond Inst RCTIX	E	Dividend	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	
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18. - Vanguard Short Term Bond Fund VFSUX	E	Dividend	P1	T	Sold (part)	01/05/21	M	D	
19.					Sold (part)	04/06/21	N	C	
20.					Sold (part)	05/24/21	O	E	
21.					Buy (add'l)	08/16/21	O		
22. - Schwab Government Money Fund SNVXX	A	Dividend			Sold	01/05/21	P1		
23. - Schwab cash accounts	A	Interest	P1	T					
24. - Atara Biotherapeutic ATRA (X)		None			Sold	01/25/21	K	D	
25. - Wework Inc WE (X)		None			Sold (part)	11/03/21	L	E	
26.					Sold	12/17/21	K	C	
27. Investment Account 2 Schwab Charitable managed by KF Advisors (H)									
28. - Schwab Donor Advised - Janus Balanced Pool JABAX		None	K	T	Sold (part)	03/18/21	J	A	
29.					Sold (part)	12/20/21	J	C	
30. - Schwab Donor Advised - Manning & Napier Conservative Pool EXDAX		None	K	T	Sold (part)	03/18/21	J	A	
31.					Sold (part)	12/20/21	J	C	
32. Armistice LP	D	Dividend	O	U					
33. DAG Ventures V-QP, L.P.	A	Dividend	L	U					
34. Hawk Ridge Partners II LP	E	Dividend	P1	U					

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35. Sculptor (OZ) Domestic Partners II LP	A	Dividend	L	U					
36. PIMCO BRAVO Fund III Onshore Feeder, L.P.	D	Dividend	N	U					
37. RCP Apex II Syndication Partners LP	A	Dividend	M	U					
38. Riverstone Credit Partners, L.P.	A	Dividend	J	U					
39. Solaris Ara Fund LP	E	Dividend	P1	U					
40. Summit Strategies COI Fund I, L.P.	C	Dividend	N	U					
41. CGSH Partners Investments, LLC	D	Dividend	N	U					
42. Retirement Account 2 Cash Balance Plan (H)									
43. - Fidelity Government Cash Reserves FDRXX		None	K	T					
44. - PIMCO Total Return Instl PTTRX		None	L	T					
45. - Vanguard International Value Port Inv Cl VTRIX		None	J	T					
46. - Vanguard International Growth Admiral VWILX		None	J	T					
47. - Vanguard Hi Yield Corporate Admiral VWEAX		None	K	T					
48. - Fidelity Extended Market Index FSMAX		None	J	T					
49. - Fidelity 500 Index FXAIX		None	J	T					
50. - Fidelity Growth Company FDGRX		None	K	T					
51. - Fidelity Total Intl Index FTIHX		None	J	T					

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52. - DFA Global Real Estate DFGEX		None	J	T					
53. - JPMorgan Small Cap Growth JGSVX		None	J	T					
54. - Vanguard Equity Income Admiral VEIRX		None	K	T					
55. - Victory Sycamore Sm Co VSOIX		None	J	T					
56. - Fidelity U.S. Bond Index FXNAX		None	L	T					
57. - Fidelity Inflat-Prot Bd FIPDX		None	K	T					
58. - Fidelity Int'l Bond Index FBIIX		None	K	T					
59. - Fidelity Short Term Bond Index FNSOX		None	L	T					
60. JPMorgan Chase cash accounts		None	N	T					
61. Investment Account 3 Charles Schwab managed by KF Advisors (H)									
62. - Ark Innovation ETF ARKK	A	Dividend	L	T					
63. - Blackrock Strategy Income BSIIX	B	Dividend	L	T					
64. - PIMCO Flexible Credit PFLEX	D	Dividend	L	T					
65. - Artisan International Value Fund APDKX	D	Dividend	L	T					
66. - Edgewood Growth Institutional EGFIX	C	Dividend	L	T					
67. - J Hancock Disciplined Value Cl 1 JVLIX	D	Dividend	L	T					
68. - Touchstone Sands Capital TSEGX	B	Dividend	L	T					

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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)	
69. - Vanguard 500 Index Fund VFIAX	B	Dividend	M	T					
70. - Vulcan Value Partners VVISX	D	Dividend	L	T					
71. - J Hancock Intl Growth Fund GOGIX	D	Dividend	L	T					
72. - Vanguard Short Term Bond Fund VFSUX	B	Dividend	L	T					
73. - Charles Schwab cash account		None	J	T					
74. Investment Account 4 Charles Schwab managed by KF Advisors (H)									
75. - Ark Innovation ETF ARKK	A	Dividend	L	T					
76. - Blackrock Strat Incm BSIIX	B	Dividend	L	T					
77. - PIMCO Flexible Credit PFLEX	D	Dividend	L	T					
78. - Artisan Intl Value Fund APDKX	D	Dividend	L	T					
79. - Edgewood Growth Instl EGFIX	C	Dividend	L	T					
80. - J Hancock Disciplined JVLIX	D	Dividend	L	T					
81. - Touchstone Sands Capital TSEGX	B	Dividend	L	T					
82. - Vanguard 500 Index Fd VFIAX	B	Dividend	M	T					
83. - Vulcan Value Partners VVISX	D	Dividend	L	T					
84. - J Hancock Intl Growth Fund GOGIX	D	Dividend	L	T					
85. - Vanguard Short Term Bond Fund VFSUX	B	Dividend	L	T					

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
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86. - Charles Schwab cash account		None	J	T					
87. Investment Account 5 Neuberger Berman (H)									
88. - Dreyfus Treasury Sec Cash Mgmt Admin DARXX	A	Interest							
89. - Air Products & Chem APD	A	Dividend							
90. - Alphabet Inc Cap Stk Cl A GOOGL		None							
91. - Amazon.com Inc AMZN		None							
92. - Ansys Inc ANSS		None			Sold (part)	03/05/21	J	B	
93.					Sold (part)	03/08/21	J	D	
94.					Sold (part)	03/11/21	J	D	
95.					Sold	03/12/21	J	D	
96. - Apple Inc AAPL	A	Dividend							
97. - Coca Cola Co KO	A	Dividend							
98. - Comcast Corp New Cl A CMCSA	A	Dividend							
99. - Eaton Corp OLC Com ETN	A	Dividend							
100. - Facebook Inc FB		None			Sold (part)	02/24/21	J	C	
101. - Home Depot Inc Com HD	A	Dividend							
102. - IHS Markit Ltd Com INFO	A	Dividend							

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103. - Johnson & Johnson JNJ	A	Dividend							
104. - Microsoft Corp MSFT	A	Dividend							
105. - Pfizer Inc PFE	A	Dividend			Sold	02/18/21	J	B	
106. - Regeneron Pharmaceuticals REGN		None							
107. - Union Pacific Corp. UNP	A	Dividend							
108. - Universal Display Corp OLED	A	Dividend							
109. - Visa Inc Com Cl A V	A	Dividend							
110. - Zoetis Inc Com UDS0.01 Cl A ZTS	A	Dividend			Sold (part)	03/08/21	J	D	
111. - Adaptive Biotechnologies Corp ADPT		None							
112. - Cintas Corp CTAS	A	Dividend							
113. - COSTCO Wholesale COST	A	Dividend							
114. - Draftkings DKNG		None							
115. - Nike Inc NKE	A	Dividend							
116. - Qualcomm QCOM	A	Dividend							
117. - T-Mobile TMUS		None							
118. - Tesla TSLA		None							
119. - Vertex Pharmaceuticals VRTX		None			Sold	04/30/21	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	
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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	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)	
120. - YETI Hldgs YETI		None			Sold (part)	03/11/21	J	D	
121. - Hologic Inc common stock HOLX		None			Buy	01/12/21	J		
122.					Buy (add'l)	01/13/21	J		
123.					Buy (add'l)	01/14/21	J		
124. - Viatris Inc common stock VTRS		None			Sold	02/01/21	J	A	
125. - Keurig Dr Pepper Inc common stock KDP	A	Dividend			Buy	03/19/21	K		
126. - Starbucks Corp common stock SBUX	A	Dividend			Buy	03/23/21	J		
127.					Buy (add'l)	03/24/21	J		
128.					Buy (add'l)	04/12/21	J		
129. - BHP Group PLC BBL		None			Buy	04/23/21	K		
130. - Peloton Interactive Inc CL A common stock PTON		None			Buy	04/19/21	J		
131.					Buy (add'l)	05/13/21	J		
132.					Buy (add'l)	05/14/21	J		
133. Retirement Account 3 TIAA (H)									
134. - TIAA Traditional		None	L	T					
135. - CREF Stock R2		None	M	T					
136. - TIAA Real Estate		None	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	
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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)	
137. - CREF Inf-Linked Bond R2		None	J	T					
138. Retirement Account 4 Charles Schwab IRA (H)									
139. - Alphabet Inc GOOGL		None			Sold	01/13/21	J	C	
140. - Bank of America Corp. common stock BAC		None							
141. - Ishares MSCI ACWI ETF ACWI		None							
142. - SPDR Dow Jones Industrial Avrg ETF DIA	A	Dividend							
143. - Charles Schwab cash account		None							
144. - Ishares MSCI Emerging Markets ETF EEM		None			Buy	01/13/21	K		
145. - VanEck Vectors Junior Gold Miners ETF GDXJ		None			Buy	01/13/21	J		
146. Investment Account 6 Morgan Stanley (H)									
147. - Legg Mason SCH Bal 50/50 0 SCBYX		None			Sold	07/20/21	M		
148. - Nuveen Co Bal Alloc PTF I CCFEX		None	L	T	Buy	07/20/21	M		
149.					Sold (part)	12/13/21	L	F	
150. Investment Account 7 Morgan Stanley (H)									
151. - Legg Mason SCH Bal 50/50 0 SCBYX		None			Sold	07/20/21	M	E	
152. - Nuveen Co Bal Alloc PTF I CCFEX		None	N	T	Buy	07/20/21	M		
153. Retirement Account 5 John Hancock managed by Wilmer Hale (H)									

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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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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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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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)	
154. - Vanguard Target Ret 2025 Inst		None							
155. Retirement Account 6 Richemont North America (H)									
156. - Prudential Principal Preservation Fund		None			Sold	10/19/21	J		
157. Investment Account 8 Charles Schwab managed by KF Advisors (H)									
158. - PIMCO Inflation Response Multi Asset Fund PIRMX	F	Dividend	O	T	Buy (add'l)	10/18/21	N		
159. - Schwab Government Money Fund SNVXX	A	Dividend			Sold	03/10/21	N		
160. - Charles Schwab cash account	A	Interest	K	T					
161. - PIMCO Short Term PTSHX	A	Dividend	N	T	Buy	10/18/21	N		
162. - River Canyon Total Return Bond Inst RCTIX	C	Dividend	N	T	Buy	10/18/21	N		
163. - Vanguard Short Term Bond Fund VFSUX	C	Dividend	N	T	Buy	10/18/21	N		
164. Fortress TSX Broadway LP		None	N	U					
165. Davidson Kempner Distressed Opportunities, LP	F	Dividend	P1	U					
166. Hudson Bay Fund LP	E	Dividend	P1	U	Buy	01/01/21	P1		
167. Oak Hill Capital Partners V (Onshore Feeder), L.P.	A	Dividend	K	U					
168. Rental Property, Rye, NY	E	Rent			Sold	09/01/21	P1	H1	
169. Retirement Account 7 Merrill (Bank of America Co) (H)									
170. - Merrill cash account		None							

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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171. Corner Ventures DAG Fund I-C LP	A	Interest	M	U	Buy	01/01/21	M		
172. Fifth Wall Ventures III LP		None	M	U	Buy	01/01/21	M		
173. Riverstone Credit Partners - Direct LP (X)	A	Dividend	M	U					
174. Investment Account 9 Charles Schwab Managed by KF Advisors (H)									
175. - Adaptive Biotechnologies Corp common stock ADPT		None			Buy	02/26/21	K		
176.					Buy (add'l)	03/09/21	J		
177.					Buy (add'l)	05/24/21	J		
178.					Sold	09/29/21	K		
179. - Alphabet Inc common stock GOOGL		None			Buy	02/03/21	K		
180.					Sold	10/27/21	K	D	
181. - Amazon.com Inc common stock AMZN		None			Buy	01/21/21	K		
182.					Buy (add'l)	03/11/21	J		
183.					Sold	10/27/21	K	B	
184. - Apple Inc common stock AAPL	A	Dividend			Buy	01/21/21	K		
185.					Buy (add'l)	03/09/21	J		
186.					Sold	10/27/21	K	D	
187. - BHP Group PLC common stock BBL	B	Dividend			Buy	04/06/21	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	
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188.					Sold	11/15/21	K		
189. - Bumble Inc common stock BMBL		None			Buy	02/22/21	K		
190.					Buy (add'l)	03/08/21	J		
191.					Buy (add'l)	05/26/21	J		
192.					Sold	10/27/21	K		
193. - Cintas Corp common stock CTAS	A	Dividend	K	T	Buy	01/21/21	K		
194. - Comcast Corp common stock CMCSA	A	Dividend			Buy	02/03/21	K		
195.					Buy (add'l)	05/18/21	J		
196.					Sold	11/09/21	K	B	
197. - Costco Wholesale Co common stock COST	A	Dividend	K	T	Buy	01/21/21	K		
198. - Danaher Corp common stock DHR	A	Dividend	K	T	Buy	06/22/21	K		
199. - Definance Nex Gen EFT FIVG	A	Dividend	L	T	Buy	11/09/21	K		
200. - Draftkings Inc common stock DKNG		None			Buy	01/21/21	K		
201.					Buy (add'l)	05/27/21	J		
202.					Sold	10/27/21	K		
203. - Eaton Corp PLC common stock ETN	A	Dividend	K	T	Buy	02/03/21	K		
204. - ETFMG Prime Cyber ETF HACK	A	Dividend	K	T	Buy	11/09/21	L		

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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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205. - Fluor Corp common stock FLR		None			Buy	03/12/21	K		
206.					Sold	05/21/21	K		
207. - Frequency Therapeutics I common stock FREQ		None			Buy	01/21/21	K		
208.					Sold	03/25/21	J		
209. - Ginkgo Bioworks H 26 WTF common stock DNAWS		None			Spinoff (from line 263)	09/17/21	K		
210.					Sold	10/11/21	J		
211. - Ginkgo Bioworks Holdings common stock DNA		None			Spinoff (from line 261)	09/17/21	J		
212.					Sold	10/06/21	K	D	
213. - Hologic Inc common stock HOLX		None			Buy	02/02/21	K		
214.					Sold	06/01/21	K		
215. - Home Depot Inc common stock HD	A	Dividend	K	T	Buy	01/21/21	K		
216.					Buy (add'l)	05/18/21	J		
217. - Innovator IBD 50 ETF FFTY	A	Dividend	L	T	Buy	11/09/21	L		
218.					Buy (add'l)	12/28/21	J		
219. - Intellia Therapeutics Inc common stock NTLA		None	K	T	Buy	05/28/21	K		
220. - Invesco QQQ Trust ETF QQQ	A	Dividend	L	T	Buy	10/28/21	L		
221.					Buy (add'l)	10/29/21	K		

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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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222. - Ishares Core S&P ETF IJR		None	K	T	Buy	12/23/21	K		
223. - Ishares Expanded TCH STX ETF IVG		None	K	T	Buy	11/09/21	K		
224. - Ishares Russell 2000 ETF IWM	A	Dividend	L	T	Buy	11/04/21	L		
225. - Johnson & Johnson common stock JNJ	A	Dividend			Buy	03/11/21	K		
226.					Sold	12/01/21	K		
227. - Keurig Dr Pepper Inc common stock KDP	A	Dividend			Buy	03/17/21	K		
228.					Sold	11/09/21	K	B	
229. - Microsoft Corp common stock MSFT	A	Dividend			Buy	01/22/21	K		
230.					Buy (add'l)	01/28/21	J		
231.					Sold	10/27/21	K	D	
232. - Moderna Inc common stock MRNA		None			Buy	05/24/21	K		
233.					Buy (add'l)	07/01/21	J		
234.					Sold	11/05/21	K	D	
235. - Nextera Energy Inc common stock NEE	A	Dividend			Buy	02/08/21	K		
236.					Buy (add'l)	03/09/21	J		
237.					Sold	11/23/21	K	C	
238. - Nike Inc common stock NKE	A	Dividend	K	T	Buy	01/21/21	K		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
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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)	
239.					Buy (add'l)	03/08/21	J		
240.					Buy (add'l)	03/25/21	J		
241. - Nvidia Corp common stock NVDA	A	Dividend			Buy	02/24/21	K		
242.					Sold	10/27/21	K	D	
243. - Paypal Holdings Inc common stock PYPL		None			Buy	06/23/21	K		
244.					Buy (add'l)	07/29/21	J		
245.					Sold	10/27/21	K		
246. - Peloton Interactive Inc common stock PTON		None			Buy	04/15/21	J		
247.					Buy (add'l)	05/11/21	J		
248.					Buy (add'l)	05/12/21	J		
249.					Sold	08/26/21	K	C	
250. - Qualcomm Inc common stock QCOM	A	Dividend			Buy	01/21/21	K		
251.					Buy (add'l)	01/28/21	J		
252.					Buy (add'l)	02/04/21	J		
253.					Buy (add'l)	03/09/21	J		
254.					Buy (add'l)	05/24/21	J		
255.					Sold	10/27/21	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	
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3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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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)	
256. - Regeneron Pharms Inc common stock REGN		None	K	T	Buy	01/21/21	K		
257.					Buy (add'l)	02/09/21	J		
258. - Select Sector Health ETF XLV	A	Dividend	L	T	Buy	11/09/21	L		
259. - Sentinelone Inc Class A common stock S		None			Buy	09/01/21	K		
260.					Sold	10/27/21	K		
261. - Soaring Eagle Acquis common stock NRNG (merged with line 211)		None			Buy	08/12/21	J		
262.					Merged (with line 1)	09/17/21	J		
263. - Soaring Eagle ACQ 26 UTF common stock SRNGU (merged with line 209)		None			Buy	03/03/21	K		
264.					Merged (with line 1)	09/17/21	K		
265. - Starbucks Corp common stock SBUX	A	Dividend	K	T	Buy	03/19/21	J		
266.					Buy (add'l)	03/22/21	J		
267.					Buy (add'l)	04/08/21	J		
268. - T-Mobile US Inc common stock TMUS		None			Buy	01/21/21	K		
269.					Sold	10/27/21	K		
270. - Union Pacific Corp common stock UNP	A	Dividend	K	T	Buy	01/21/21	K		
271. - Vanguard Financials ETF VFH	A	Dividend	L	T	Buy	10/28/21	L		
272. - Vanguard S&P 500 ETF VOO	A	Dividend	L	T	Buy	11/04/21	L		

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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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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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)	
273. - Visa Inc common stock V	A	Dividend			Buy	02/03/21	K		
274.					Sold	10/27/21	K	B	
275. - Zoetis Inc common stock ZTS	A	Dividend	K	T	Buy	05/21/21	K		
276. - Charles Schwab cash account (X)	A	Interest	L	T					
277. Citizens Wealth cash accounts (X)	A	Interest	O	T					
278. Investment Account 10 TIAA (H)									
279. - TIAA cash account	A	Interest	K	T					
280. - Adaptive Biotechnologies Corp common stock ADPT (X)		None			Sold	07/22/21	K	A	
281. - Air Products and Chemicals Inc common stock APD (X)	A	Dividend	K	T					
282. - Alphabet Inc common stock GOOGL (X)		None	L	T					
283. - Amazon.com Inc common stock AMZN (X)		None	L	T					
284. - Apple Inc common stock AAPL (X)	A	Dividend	L	T					
285. - BHP Group PLC common stock BBL (X)		None			Sold	07/22/21	K	A	
286. - Cintas Corp common stock CTAS (X)		None			Sold	07/22/21	K	B	
287. - Coca-Cola common stock KO (X)		None			Sold (part)	07/22/21	J	B	
288.					Sold	09/15/21	J	B	
289. - Comcast Corp common stock CMCSA (X)	A	Dividend	J	T	Sold (part)	07/22/21	K	D	

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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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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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)	
290. - Costco Wholesale Corp common stock COST (X)	A	Dividend	K	T					
291. - DraftKings Inc common stock DKNG (X)		None			Sold (part)	09/15/21	J	C	
292.					Sold	11/04/21	K	B	
293. - Eaton Corp PLC common stock ETN (X)	A	Dividend	K	T	Sold (part)	07/22/21	J	C	
294. - Hologic Inc common stock HOLX (X)		None			Sold	07/22/21	K		
295. - Home Depot Inc common stock HD (X)	A	Dividend	L	T					
296. - Ishares Russell 2000 Growth ETF IWO	A	Dividend	K	T	Buy	07/22/21	J		
297.					Buy (add'l)	09/15/21	J		
298. - Ishares Russell 2000 Value ETF IWN	A	Dividend	J	T	Buy	07/22/21	J		
299.					Buy (add'l)	09/15/21	J		
300. - Ishares Russell Mid-Cap Growth ETF IWP	A	Dividend	K	T	Buy	07/22/21	K		
301.					Buy (add'l)	09/15/21	K		
302. - Ishares Russell Mid-Cap Value ETF IWS	A	Dividend	L	T	Buy	07/22/21	J		
303.					Buy (add'l)	08/26/21	K		
304.					Buy (add'l)	11/04/21	J		
305. - Johnson & Johnson common stock JNJ (X)	A	Dividend	K	T					
306. - Keurig Dr Pepper Inc common stock KDP (X)		None			Sold	07/22/21	K	B	

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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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307. - Meta Platforms Inc common stock FB (X)		None	K	T					
308. - Microsoft Corp common stock MSFT (X)	A	Dividend	L	T					
309. - Nike Inc common stock NKE (X)	A	Dividend	K	T					
310. - Peloton Interactive Inc common stock PTON (X)		None			Sold	08/26/21	K	C	
311. - Qualcomm Inc common stock QCOM (X)	A	Dividend	K	T					
312. - Regeneron Pharmaceuticals Inc common stock REGN (X)		None	K	T	Sold (part)	07/22/21	K	C	
313. - Starbucks Corp common stock SBUX (X)	A	Dividend	K	T					
314. - Tesla Inc common stock TSLA (X)		None			Sold	07/22/21	J	B	
315. - T-Mobile US Inc common stock TMUS (X)		None	K	T					
316. - Union Pacific Corp common stock UNP (X)	A	Dividend	K	T	Sold (part)	04/22/21	K	C	
317. - Universal Display Corp common stock OLED (X)		None			Sold	09/15/21	J	D	
318. - Visa Inc common stock V (X)	A	Dividend	K	T					
319. - YETI Holdings Inc common stock YETI (X)		None	K	T	Sold (part)	09/15/21	J	D	
320. - Zoetis Inc common stock ZTS (X)	A	Dividend	K	T					
321. - Harding Loevner Inst Emerging Markets HLMEX	A	Dividend	J	T	Buy	08/10/21	J		
322. - Harding Loevner Intl Equity HLMIX	A	Dividend	K	T	Buy	08/10/21	J		
323.					Buy (add'l)	09/15/21	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

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324. - IHS Markit Ltd common stock INFO (X)	A	Dividend	K	T					
325. - Ishares Core MSCI EAFE ETF IEFA	A	Dividend	J	T	Buy	08/09/21	J		
326.					Buy (add'l)	06/15/21	J		
327. - Ishares Core MSCI Emerging Markets ETF IEMG	A	Dividend	J	T	Buy	08/09/21	J		
328. - Ishares Short-Term Nat Muni Bond ETF SUB	A	Dividend	J	T	Buy	09/15/21	J		
329. - Nuveen Intermed Dur Muni Bond Fund NUVBX	B	Dividend	L	T	Buy	07/23/21	L		
330.					Buy (add'l)	07/27/21	J		
331.					Buy (add'l)	11/04/21	J		
332. Retirement Account 8 TIAA (H)									
333. - TIAA cash account	A	Interest	J	T					
334. - Bank of America Corp common stock BAC (X)		None			Sold	07/22/21	J	D	
335. - Clearbridge Large Cap Growth Fund LSITX		None	J	T	Buy	07/22/21	J		
336.					Buy (add'l)	10/29/21	J		
337.					Buy (add'l)	12/29/21	J		
338. - Cohen & Steers Real Estate Fund CREFX	A	Dividend	J	T	Buy	10/29/21	J		
339. - FlexShares Quality Dividend Index Fund QDF	A	Dividend	J	T	Buy	07/22/21	J		
340.					Buy (add'l)	10/29/21	J		

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341. - IShares MSCI ACWI ETF ACWI (X)		None			Sold	07/22/21	K	D	
342. - Ishares MSCI Emerging Markets ETF EEM (X)		None			Sold (part)	07/22/21	J		
343.					Sold	08/03/21	J		
344. - VanEck Vectors Junior Gold Miners ETF GDXJ (X)		None			Sold	07/22/21	J		
345. - Ishares Russell 2000 Growth ETF IWO	A	Dividend	J	T	Buy	07/22/21	J		
346. - Ishares Russell 2000 Value ETF IWN	A	Dividend	J	T	Buy	07/22/21	J		
347.					Buy (add'l)	07/23/21	J		
348.					Buy (add'l)	12/17/21	J		
349. - Ishares Russell Mid-Cap Growth ETF IWP	A	Dividend	J	T	Buy	07/22/21	J		
350.					Buy (add'l)	10/29/21	J		
351. - Ishares Russell Mid-Cap Value ETF IWS	A	Dividend	J	T	Buy	07/22/21	J		
352.					Buy (add'l)	07/23/21	J		
353. - TIAA-CREF Large Cap Growth Index Fund TILIX	A	Dividend	J	T	Buy	07/22/21	J		
354.					Buy (add'l)	10/29/21	J		
355.					Buy (add'l)	12/17/21	J		
356. - TIAA-CREF Large Cap Value Index Fund TILVX	A	Dividend	J	T	Buy	07/23/21	J		
357.					Buy (add'l)	10/29/21	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			
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358. - Harding Loevner Institut Emerging Markets HLMEX	A	Dividend	J	T	Buy	08/03/21	J		
359.					Buy (add'l)	08/11/21	J		
360.					Buy (add'l)	10/29/21	J		
361. - Harding Loevner Intl Equity HLMIX	A	Dividend	J	T	Buy	07/23/21	J		
362.					Buy (add'l)	10/29/21	J		
363.					Buy (add'l)	12/17/21	J		
364. - Ishares Core MSCI EAFE ETF IEFA	A	Dividend	J	T	Buy	07/22/21	J		
365.					Buy (add'l)	10/29/21	J		
366. - Ishares Core MSCI Emerging Markets ETF IEMG	A	Dividend	J	T	Buy	08/03/21	J		
367.					Buy (add'l)	10/29/21	J		
368. - Ishares MSCI EAFE Small Cap ETF SCZ	A	Dividend	J	T	Buy	07/23/21	J		
369. - MFS Intl Discovery Fund MIDLX	A	Dividend	J	T	Buy	07/23/21	J		
370.					Buy (add'l)	12/08/21	J		
371. - Baird Core Plus Bond Fund BCOIX	A	Dividend	J	T	Buy	07/22/21	J		
372.					Buy (add'l)	10/29/21	J		
373. - DFA Inflation Protected Securities Portfolio DIPSX	A	Dividend	J	T	Buy	10/29/21	J		
374. - SPDR Dow Jones Ind Avg ETF DIA (X)		None			Sold	07/22/21	K	D	

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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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)	
375. - TIAA-CREF High Yield Fund TIHYX	A	Dividend	J	T	Buy	07/22/21	J		
376. - Vanguard Intermediate Term Bond Index VBILX	A	Dividend	J	T	Buy	07/23/21	J		
377.					Buy (add'l)	10/29/21	J		
378. - Vanguard Short Term Bond Index VBIRX	A	Dividend	J	T	Buy	07/23/21	J		
379. - Ishares Gold Trust IAU		None	J	T	Buy	10/29/21	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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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Retirement Account 1 Fidelity Investments managed by Cleary Gottlieb Steen & Hamilton LLP was rolled into Thrift Savings Plan, which is excludable from reporting under Section 102(i)(1). Line 2-3 Retirement Plan did not provide income information nor purchase/sales information.
Investment Account 1 Charles Schwab managed by KF Advisors: Line 24 and 25 were spinoffs from DAG Ventures V QP, LP (Line 33).
RCP Apex II Syndication Partners LP: Line 37 was incorrecly named Riversone RCP Apex II LP Line 77 on previous filing.
Retirement Account 2 Cash Balance Plan: Line 42-59 Retirement plan did not provide income information nor purchase/sales information.
Effective December 1, 2021 Facebook (FB) changed its name to Meta (MVRS). See respective lines for name change.
Investment Account 3 Charles Schwab managed by KF Advisors: Investment Line 70 Vulcan Value Partners VVISX was incorrectly labeled VVPXS on previous filing.
Investment Account 4 Charles Schwab managed by KF Advisors: Investment Line 83 Vulcan Value Partners VVISX was incorrectly labeled VVPXS on previous filing.
Investment Account 5 Neuberger Berman: Investment Line 112 Cintas Corp CTAS was incorrectly labeled STAS on previous filing.
Investment Account 5 Neuberger Berman: Investment Line 124 was a spinoff of Pfizer (PEF), line 105 originally acquired in 2015, resulting in a Column D sale with no prior purchase.
Investment Account 5 Neuberger Berman: Line 87 remainder investments were transferred to Investment Account 10 TIAA Line 278.
Retirement Account 4 Charles Schwab IRA: Line 138 remainder investments were transferred into Retirement Account 8 Line 332.
Retirement Account 5 John Hancock managed by Wilmer Hale: Line 153 investment was rolled into Thrift Savings Plan, which is excludable from reporting under Section 102(i)(1).
Retirement Account 6 Richemont North America: Line 155 investment was sold, with proceeds being rolled into Thrift Savings Plan, which is excludable from reporting under Section 102(i)(1).
Retirement Account 7 Merrill (Bank of America Co): Line 169 Investment was rolled into Thrift Savings Plan, which is excludable from reporting under Section 102(i)(1).
Riverstone Credit Partners - Direct LP: Line 173 investment was inadvertantly excluded from previous filing.
Investment Account 9 Charles Schwab managed by KF Advisors: Line 276 cash account opened during the current reporting period.
Citizens Wealth cash account opened during the current reporting period.
Investment Account 10 TIAA: Investment Lines 280-295, 305-320 were transferred from Investment Account 5 Neuberger Berman.
Retirement Account 8 TIAA: Lines 334, 341, 342, 344, and 374 were transferred from Retirement Account 4 Charles Schwab IRA.

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/ Lewis J. Liman

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