AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 13101-13111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Lorenz, Myron J.	U.S. District Court Southern Distrct of California	08/14/2023
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	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
Edward J. Schwartz United States Courthouse 221 West Broadway San Diego, CA 92101		

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	Trust #1 (reportable assets listed in Part VII)
2.	Member	Board of Advisors of Marine Corps Recruit Depot Museum & Historical Society
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.		
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.					
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
Lorenz, Myron J.	08/14/2023

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. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1.	Individual Assets (H)									
2.	Wells Fargo Bank (cash)		None	L	T					
3.	Real Estate Parcel #1, San Diego County, CA		None	P1	W					
4.	Account #1 (H)									
5.	Accenture Plc (ACN) (Y)									
6.	Broadcom Inc. (AVGO)		None	J	T					
7.	Chevron (CVX) (X)	A	Dividend	J	T					
8.	Cisco Systems, Inc. (CSCO) (Y)									
9.	Comcast Corporation (CMCSA) (Y)									
10.	The Home Depot, Inc. (HD) (Y)									
11.	Honeywell International Inc. (HON) (Y)									
12.	Johnson & Johnson (JNJ)	A	Dividend	J	T					
13.	JPMorgan Chase & Co. (JPM)	A	Dividend	J	T					
14.	Lam Research Corporation (LRCX) (Y)									
15.	Marsh & McLennan Companies, Inc. (MMC) (Y)									
16.	Microsoft Corporation (MSFT) (Y)									
17.	Northrop Grumman (NOC)	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
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3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
S =Assessment
T =Cash Market
U =Book Value
V =Other
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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)	
18. Target Corporation (TGT) (Y)									
19. Texas Instruments Incorporated (TXN) (Y)									
20. Unitedhealth Gp Inc (UNH)	A	Dividend	J	T					
21. ARK Innovation ETF (ARKK)		None	J	T	Buy	03/31/22	J		
22.					Buy (add'l)	05/11/22	J		
23. Invesco QQQ Trust (QQQ)	A	Dividend	K	T	Sold (part)	12/05/22	J		
24. Vanguard Dividend Appreciation Index Fund (VIG)	A	Dividend	J	T	Sold (part)	12/05/22	J	A	
25. Vanguard 500 Index Fund (VOO)	A	Dividend	K	T	Sold (part)	12/05/22	J	A	
26. BlackRock Mid-Cap Growth Equity Portfolio Institutional Shares (CMGIX)		None	K	T					
27. PGIM Jennison Global Opportunities Fund (PRJZX)		None	K	T	Buy	05/11/22	J		
28. Account #2 (H)									
29. Columbia Dividend Income Fund Class C (LBSCX)	B	Dividend	K	T					
30. MFS Growth Fund Class C (MFECX)	A	Dividend	K	T					
31. MSIF Global Franchise Portfolio (MSGFX)	A	Dividend	K	T					
32. MSIF Global Opportunity Portfolio C (MSOPX)	C	Dividend	J	T					
33. Ebay (Y)									
34. Lockheed Martin (Y)									

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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
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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35. Account #3 (H)									
36. Morgan Stanley Bank (cash) (X)	A	Interest	K	T					
37. MSIF Trust Ultra Short Income Portfolio (MUAIX) (X)	A	Dividend			Sold	04/18/22	L		
38. FTP S&P Dividend Aristocrats Target 1Q 2021 (FWSVRX) (X)		None			Sold	04/07/22	M	E	
39. FTP S&P Dividend Aristocrats Target 1Q 2022	B	Dividend	M	T	Buy	04/07/22	M		
40. Blackstone BREIT (X)	D	Distribution	M	T					
41. Partners Group PE - A ESC		None	L	T	Buy	04/27/22	L		
42. Starwood Real Estate Income (X)	B	Distribution	K	T					
43. Account #4 (H)									
44. Morgan Stanley Bank (cash)	A	Interest	J	T	Open	04/07/22	J		
45. Abbott Labratories (ABT) (Y)									
46. Abbvie Inc Com (ABBV)	A	Dividend	J	T	Buy	04/07/22	J		
47. Accenture Plc (ACN)	A	Dividend	J	T	Buy	04/07/22	J		
48. Analog Devices Inc (ADI)	A	Dividend	J	T	Buy	04/07/22	J		
49. Automatic Data Processing (ADP) (Y)									
50. Bank of America Corp (BAC)	A	Dividend	J	T	Buy	04/07/22	J		
51. Becton Dickinson & Co (BDX) (X)	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; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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52. Broadcom Inc (AVGO)	A	Dividend	J	T	Buy	04/07/22	J		
53. Chevron Corp (CVX)	A	Dividend	J	T	Buy	04/07/22	J		
54. Chubb Ltd (CB)	A	Dividend	J	T	Buy	04/07/22	J		
55. Cisco Sys Inc (CSCO)	A	Dividend	J	T	Buy	04/07/22	J		
56. CME Group (CME)	A	Dividend	J	T	Buy	04/07/22	J		
57. Coca Cola Co (KO)	A	Dividend	J	T	Buy	04/07/22	J		
58. Comcast Corp (CMCSA)	A	Dividend	J	T	Buy	04/07/22	J		
59. Conocophillips (COP) (Y)									
60. Deere & Co (DE)	A	Dividend	J	T	Buy	04/07/22	J		
61. Elevance Health Inc (ELV) (was Anthem Inc Com (ANTM))	A	Dividend	J	T	Buy	04/07/22	J		
62. Eli Lilly & Co (LLY)	A	Dividend	J	T	Buy	04/07/22	J		
63. EOG Resources Inc (EOG)	A	Dividend	J	T	Buy	04/07/22	J		
64. Exxon Mobil Corp (XOM)	A	Dividend	J	T	Buy	04/07/22	J		
65. Home Depot (HD)	A	Dividend	J	T	Buy	04/07/22	J		
66. Honeywell Intl Inc (HON)	A	Dividend	J	T	Buy	04/07/22	J		
67. Intl Business Machines Corp (IBM) (X)	A	Dividend	J	T					
68. Johnson & Johnson (JNJ)	A	Dividend	J	T	Buy	04/07/22	J		

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69. JPMorgan Chase & CO (JPM)	A	Dividend	J	T	Buy	04/07/22	J		
70. KLA Corporation (KLAC)	A	Dividend	J	T	Buy	04/07/22	J		
71. Lam Research Corporation (LRCX)	A	Dividend	J	T	Buy	04/07/22	J		
72. Marsh & Mclennon Cos Inc (MMC)	A	Dividend	J	T	Buy	04/07/22	J		
73. Mc Donalds Corp (MCD)	A	Dividend	J	T	Buy	04/07/22	J		
74. Medtronics Plc (MDT)	A	Dividend	J	T	Buy	04/07/22	J		
75. Merck & Co Inc (MRK)	A	Dividend	J	T	Buy	04/07/22	J		
76. Microchip Technology Inc (MCHP) (X)	A	Dividend	J	T					
77. Microsoft Corp (MSFT)	A	Dividend	J	T	Buy	04/07/22	J		
78. Mondelez Intl Inc Com (MDLZ) (X)	A	Dividend	J	T					
79. Nextera Energy Inc (NE) (X)	A	Dividend	J	T					
80. Northern Trust Corp (NTRS) (Y)									
81. Northrop Grumman Cp (NOC)	A	Dividend	J	T	Buy	04/07/22	J		
82. Pepsico Inc (PEP)	A	Dividend	J	T	Buy	04/07/22	J		
83. Phillip Morris Intl Inc (PM)	A	Dividend	J	T	Buy	04/07/22	J		
84. PNC Finl Svcs Inc (PPG)	A	Dividend	J	T	Buy	04/07/22	J		
85. Proctor & Gamble (PG)	A	Dividend	J	T	Buy	04/07/22	J		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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86. Target Corporation (TGT)	A	Dividend	J	T	Buy	04/07/22	J		
87. Texas Instruments (TXN)	A	Dividend	J	T	Buy	04/07/22	J		
88. Trane Technologies Plc (TT) (X)	A	Dividend	J	T					
89. US Bancorp Com (USB)	A	Dividend	J	T	Buy	04/07/22	J		
90. Union Pacific Corp (UNP)	A	Dividend	J	T	Buy (add'l)	04/07/22	J		
91. United Parcel Ser Inc (UPS)	A	Dividend	J	T	Buy	04/07/22	J		
92. United Health Gp Inc (UNH)	A	Dividend	J	T	Buy	04/07/22	J		
93. Valero Energy Cp Dela New (VLO) (X)	A	Dividend	J	T					
94. Verizon Communications (VZ) (Y)									
95. Waste Mgmt Inc (WM)	A	Dividend	J	T	Buy	04/07/22	J		
96. ARK Genomic Revolution ETF (ARKG) (X)		None			Sold	04/07/22	J		
97. ARK Innovation ETF (ARKK) (X)		None			Sold	04/07/22	K		
98. Invesco QQQ Trust (QQQ) (X)	A	Dividend	J	T					
99. Vanguard Mid-Cap ETF Index (VO)	A	Dividend	J	T	Buy	04/07/22	J		
100. Vanguard Total Intl Stock ETF (VXUS)	A	Dividend	K	T	Buy	04/07/22	K		
101. American Funds Capital World Growth & Income Fund Class F-2 (WGIFX) (X	B	Dividend	L	T					
102. American Funds The Investment Company of America (ICAFX) (X)	D	Dividend	L	T	Sold (part)	04/12/22	K	D	

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103.					Buy (add'l)	12/20/22	J		
104. BlackRock Mid-Cap Growth Equity Port. Inst'l Shares (CMGIX) (X)		None	J	T	Sold (part)	04/07/22	J		
105. Invesco Equally-Weighted S&P 500 Fund (VADDX)	C	Dividend	L	T	Sold (part)	10/25/22	K	B	
106.					Buy (add'l)	12/20/22	J		
107. MFS Growth Fund (MFEIX)	A	Dividend	L	T	Sold (part)	04/07/22	K	D	
108.					Buy (add'l)	12/20/22	J		
109. MSIF Global Opportunity Portfolio (MGGIX)	E	Dividend	L	T	Buy (add'l)	04/13/22	J		
110.					Buy (add'l)	10/26/22	J		
111.					Buy (add'l)	12/20/22	J		
112. MSIF International Opportunity Portfolio (MIOIX) (X)	B	Dividend	K	T	Sold (part)	04/07/22	K		
113.					Buy (add'l)	10/26/22	J		
114. MSIF Discovery Portfolio (MPEGX) (X)		None			Sold	04/07/22	J		
115. Account #5 (H)									
116. Morgan Stanley (cash)									
117. Amazon (AMZN)									
118. Apple (AAPL)									
119. Applied Materials (AMAT)									

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
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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)	
120. AT&T Inc (T)									
121. Lumen Technologies (LUMN)									
122. Microsoft (MSFT)									
123. Realty Income Corp (O)									
124. Royal Dutch Shell (SHEL)									
125. Verizon (VZ)									
126. San Jose Calif Arpt Rev Bonds									
127. Principal Global Divers Inc C (PGDCX)									
128. Oppenheimer									
129. Thornberg Intl Growth C (TIGCX)									
130. Catalyst Milburn Hedged Strat C (MBXCX)									
131. Advanced Micro Devices (AMD)									
132. Bank of America (BAC)									
133. Nvidia (NVDA)									
134. Qualcomm (QCOM)									
135. Skyworks Solutions Inc (SWKS)									
136. Tesla Inc (TSLA)									

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
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C =$2,501 - $5,000
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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
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Name of Person Reporting	Date of Report
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
137. Twist Bioscience (TWST)									
138. Vuzix (VUZI)									
139. Orion Office REIT Inc (ONL)									
140. Partners Group Private Equity Masters Fund LLC									

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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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 45 of the filing instructions.

Part VII, lines 45, 49, 59, 80, and 94: Following otherwise reportable purchases of "J" on 4/7/22, these items became unreportable without corresponding reportable transactions.

Part VII: Dring this reporting cycle, various assets were shifted or split between accounts without reportable transactions.

Part VII, Account #5: These holdings are not reportable in this cycle. (Y)

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. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Myron J. Lorenz

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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