AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

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	08/13/2024
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		
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.	08/13/2024

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.	Individual Assets (H)									
2.	Wells Fargo Bank (cash)		None	M	T					
3.	Real Estate Parcel #1, San Diego County, CA		None	P1	W					
4.	Account #1 (H)									
5.	Broadcom Inc. (AVGO)	A	Dividend			Sold	06/23/23	J	A	
6.	Chevron (CVX) (Y)									
7.	Johnson & Johnson (JNJ)	A	Dividend			Sold	06/23/23	J		
8.	JPMorgan Chase & Co. (JPM)	A	Dividend			Sold	06/23/23	J	A	
9.	Microsoft Corp (MSFT) (X)	A	Dividend			Sold	06/23/23	J	A	
10.	Northrop Grumman (NOC) (Y)									
11.	Unitedhealth Gp Inc (UNH) (Y)									
12.	ARK Innovation ETF (ARKK)		None			Sold	06/23/23	K		
13.	Invesco QQQ Trust (QQQ)	A	Dividend	K	T	Sold (part)	12/15/23	J	A	
14.	Vanguard Dividend Appreciation Index Fund (VIG)	A	Dividend	J	T					
15.	Vanguard Mid-Cap Index Fund ETF (VO)	A	Dividend	K	T	Buy	06/23/23	K		
16.						Sold (part)	12/15/23	J	A	
17.	Vanguard 500 Index Fund (VOO)	A	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000	
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000		
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000		
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000		
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000			
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market		
	U =Book Value	V =Other	W =Estimated			

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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. Vanguard Total World Stock Index Fund ETF (VT)	A	Dividend	K	T	Buy	06/23/23	K		
19. BlackRock Mid-Cap Growth Equity Portfolio Institutional Shares (CMGIX)		None	K	T	Sold (part)	06/23/23	K		
20.					Sold (part)	12/15/23	J		
21. Columbia Dividend Income Fund Institutional Class (GSFTX)	B	Dividend	L	T	Buy	06/23/23	L		
22.					Sold (part)	12/15/23	J	A	
23. PGIM Jennison Global Opportunities Fund (PRJZX)		None	K	T	Sold (part)	06/23/23	K		
24.					Sold (part)	12/15/23	J		
25. Account #2 (H)									
26. Columbia Dividend Income Fund Class C (LBSCX)	B	Dividend	K	T					
27. MFS Growth Fund Class C (MFECX)	B	Dividend	K	T	Sold (part)	12/13/23	J		
28. MSIF Global Franchise Portfolio (MSGFX)	A	Dividend	K	T	Sold (part)	12/13/23	J	A	
29. MSIF Global Opportunity Portfolio C (MSOPX)	A	Dividend	K	T					
30. Account #3 (H)									
31. Morgan Stanley Bank (cash)	C	Interest	M	T					
32. Amazon Com Inc (AMZN) (X)		None	M	T					
33. Apple Inc (APPL) (X)	A	Dividend	M	T					
34. Applied Materials Inc (AMAT) (X)	A	Dividend	L	T					

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35. Microsoft Corp (MSFT) (X)	A	Dividend	M	T					
36. Tesla Inc (TSLA) (X)		None	J	T					
37. Unit FTP S&P Dividend Aristocrats Target 1Q 2022	A	Interest			Sold	04/13/23	M		
38. Unit First Trust S&P Dividend Aristocrats Buy-Write 28 (30330Q266)	B	Interest	M	T	Buy	04/13/23	M		
39. Blackstone BREIT	D	Distribution	M	T					
40. NH PIF Class S Sec	D	Distribution	M	T	Buy	04/01/23	L		
41. Partners Group PE - A ESC		None	L	T					
42. Starwood Real Estate Income	B	Distribution	K	T					
43. Account #4 (H)									
44. Morgan Stanley Bank (cash)	A	Interest	J	T					
45. Abbot Laboratories (ABT) (X)	A	Dividend			Sold	06/23/23	J		
46. Abbvie Inc Com (ABBV)	A	Dividend			Buy (add'l)	03/10/23	J		
47.					Sold	06/23/23	J		
48. Accenture Plc (ACN)	A	Dividend			Sold	06/23/23	J		
49. Advanced Micro Devices (AMD) (X)		None			Sold	03/10/23	J		
50. Agilent Technologies (A)	A	Dividend			Buy	03/10/23	J		
51.					Sold	06/23/23	J		

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2. Value Codes (See Columns C1 and D3)
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52. Air Prod & Chem Inc (APD)	A	Dividend			Buy	03/10/23	J		
53.					Sold	06/23/23	J	A	
54. Airbus SE Unsponsered ADR (EADSY)	A	Dividend			Buy	03/10/23	J		
55.					Sold	06/23/23	J	A	
56. Alphabet Inc Cl A (GOOGL)		None			Buy	03/10/23	J		
57.					Sold	06/23/23	J	C	
58. Amer Intl Gp Inc New (AIG)	A	Dividend			Buy	03/10/23	J		
59.					Sold	06/23/23	J	A	
60. American Elec Pwr Co Inc (AEP)	A	Dividend			Buy	03/10/23	J		
61.					Sold	06/23/23	J		
62. American Express (AXP)	A	Dividend			Buy	03/10/23	J		
63.					Sold	06/23/23	J		
64. American Tower Corp (AMT)	A	Dividend			Buy	03/10/23	J		
65.					Sold	06/23/23	J		
66. Analog Devices Inc (ADI)	A	Dividend			Sold	06/23/23	J	A	
67. Apple Inc (APPL)	A	Dividend			Buy	03/10/23	J		
68.					Sold	06/23/23	J	B	

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69. Astrazenca PLC ADR (AZN)		None			Buy	03/10/23	J		
70.					Sold	06/23/23	J	A	
71. Automatic Data Processing (ADP) (X)	A	Dividend			Sold	06/23/23	J		
72. Bank of America Corp (BAC)	A	Dividend			Sold (part)	03/10/23	J		
73.					Sold	06/23/23	J		
74. Becton Dickinson & Co (BDX)	A	Dividend			Sold	06/23/23	J		
75. Blackrock Inc (BLK)	A	Dividend			Buy	03/10/23	J		
76.					Sold	06/23/23	J	A	
77. Bristol Myers Squibb Co (BMY)	A	Dividend			Buy	03/10/23	J		
78.					Sold	06/23/23	J		
79. Broadcom Inc (AVGO)	A	Dividend			Buy (add'l)	03/10/23	J		
80.					Buy (add'l)	03/13/23	J		
81.					Sold	06/23/23	J	B	
82. Celanese Corp Series A Com (CE)	A	Dividend			Buy	03/10/23	J		
83.					Sold	06/23/23	J		
84. Chevron Corp (CVX)	A	Dividend			Buy (add'l)	03/10/23	J		
85.					Sold	06/23/23	J		

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86. Charles Schwab New (SCHW)		None			Buy	03/10/23	J		
87.					Sold	03/13/23	J		
88. Chubb Ltd (CB)	A	Dividend			Buy (add'l)	03/10/23	J		
89.					Buy (add'l)	04/18/23	J		
90.					Sold	06/23/23	J		
91. Cisco Sys Inc (CSCO)	A	Dividend			Buy (add'l)	03/10/23	J		
92.					Sold	06/23/23	J	A	
93. CME Group (CME)	A	Dividend			Sold	06/23/23	J		
94. Coca Cola Co (KO)	A	Dividend			Buy (add'l)	03/10/23	J		
95.					Sold	06/23/23	J	A	
96. Cognizant Tech Solutions CL A (CTSH)	A	Dividend			Buy	03/10/23	J		
97.					Sold	06/23/23	J	A	
98. Colgate Palmolive Co (CL)	A	Dividend			Buy	03/10/23	J		
99.					Sold	06/23/23	J	A	
100. Comcast Corp (CMCSA)	A	Dividend			Buy (add'l)	03/10/23	J		
101.					Sold	06/23/23	J	A	
102. Conocophillips (COP)	A	Dividend			Buy	03/10/23	J		

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103.					Sold	06/23/23	J		
104. Constellation Energy Corp (CEG)	A	Dividend			Buy	03/10/23	J		
105.					Sold	06/23/23	J	A	
106. Cummins Inc (CMI) (X)	A	Dividend			Sold	06/23/23	J	A	
107. Deere & Co (DE) (Y)									
108. Diageo PLC Spon New ADR (DEO)		None			Buy	03/10/23	J		
109.					Sold	06/23/23	J		
110. Duke Energy Corporation (DUK)	A	Dividend			Buy	03/10/23	J		
111.					Sold	06/23/23	J		
112. Eaton Corp PLC SHS (ETN) (X)	A	Dividend			Sold	06/23/23	J	A	
113. Elevance Health Inc (ELV)	A	Dividend			Sold	06/23/23	J		
114. Eli Lilly & Co (LLY) (Y)									
115. EOG Resources Inc (EOG)	A	Dividend			Sold	06/23/23	J		
116. Exxon Mobil Corp (XOM)	A	Dividend			Buy (add'l)	03/10/23	J		
117.					Sold	06/23/23	J	A	
118. Fidelity Natl Information SE (FIS)		None			Buy	03/10/23	J		
119.					Sold	03/27/23	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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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. FMC Corp New (FMC)	A	Dividend			Buy	03/10/23	J		
121.					Sold	06/23/23	J		
122. HCA Healthcare Inc (HCA)	A	Dividend			Buy	03/10/23	J		
123.					Sold	06/23/23	J	A	
124. Hilton Worldwide Hldgs Inc (HLT)	A	Dividend			Buy	03/10/23	J		
125.					Sold	06/23/23	J		
126. Home Depot (HD)	A	Dividend			Sold	06/23/23	J	A	
127. Honeywell Intl Inc (HON)	A	Dividend			Sold	06/23/23	J	A	
128. Host Hotels & Resorts Inc (HST)	A	Dividend			Buy	03/10/23	J		
129.					Sold	06/23/23	J	A	
130. Intl Business Machines Corp (IBM)	A	Dividend			Buy (add'l)	03/10/23	J		
131.					Sold	06/23/23	J	A	
132. Johnson & Johnson (JNJ)	A	Dividend			Buy (add'l)	03/10/23	J		
133.					Sold	06/23/23	J		
134. Johnson Ctls Intl PLC (JCI)	A	Dividend			Buy	03/10/23	J		
135.					Sold	06/23/23	J	A	
136. JPMorgan Chase & CO (JPM)	A	Dividend			Buy (add'l)	03/10/23	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	
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137.					Sold	06/23/23	J	A	
138. KLA Corporation (KLAC)	A	Dividend			Sold	06/23/23	J	A	
139. Lam Research Corporation (LRCX)	A	Dividend			Sold	06/23/23	J	A	
140. Linde PLC (LIN) (X)	A	Dividend			Sold	06/23/23	J	A	
141. Lockheed Martin Corp (LMT)	A	Dividend			Buy	03/10/23	J		
142.					Sold	06/23/23	J		
143. Lowes Companies Inc (LOW)	A	Dividend			Buy	03/10/23	J		
144.					Sold	06/23/23	J	A	
145. Lumen Technologies Inc (LUMN) (X)		None			Sold	03/10/23	J		
146. Marsh & Mclennan Cos Inc (MMC)	A	Dividend			Sold	06/23/23	J	A	
147. Mc Donalds Corp (MCD)	A	Dividend			Sold	06/23/23	J	A	
148. Medtronics Plc (MDT)	A	Dividend			Buy (add'l)	03/10/23	J		
149.					Sold	06/23/23	J	A	
150. Merck & Co Inc (MRK)	A	Dividend			Buy (add'l)	03/10/23	J		
151.					Sold	06/23/23	J	A	
152. Microchip Technology Inc (MCHP)	A	Dividend			Sold	06/23/23	J	A	
153. Microsoft Corp (MSFT)	A	Dividend			Buy (add'l)	03/10/23	J		

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154.					Sold	06/23/23	J	C	
155. Mondelez Intl Inc Com (MDLZ)	A	Dividend			Buy (add'l)	03/10/23	J		
156.					Sold	06/23/23	J	A	
157. Morgan Stanley (MS)	A	Dividend			Buy	03/10/23	J		
158.					Sold	06/23/23	J		
159. Nextera Energy Inc (NE)	A	Dividend			Sold	06/23/23	J		
160. Nike Inc B (NKE) (X)	A	Dividend			Sold	06/23/23	J	A	
161. Northern Trust Corp (NTRS) (X)	A	Dividend			Sold	06/23/23	J		
162. Northrop Grumman Cp (NOC)	A	Dividend			Buy (add'l)	03/10/23	J		
163.					Sold	06/23/23	J		
164. Novartis AG ADR (NVS)		None			Buy	03/10/23	J		
165.					Sold	06/23/23	J	B	
166. Nvidia Corporation (NVDA) (X)	A	Dividend			Sold	03/10/23	J	B	
167. Otis Worldwide Corp (OTIS)	A	Dividend			Buy	03/10/23	J		
168.					Sold	06/23/23	J	A	
169. Parker Hannifin Corp (PH)	A	Dividend			Buy	03/10/23	J		
170.					Sold	06/23/23	J	A	

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171. Pepsico Inc (PEP)	A	Dividend			Buy (add'l)	03/10/23	J		
172.					Sold	06/23/23	J	A	
173. Pfizer Inc (PFE)	A	Dividend			Buy	03/10/23	J		
174.					Sold	06/23/23	J		
175. Phillip Morris Intl Inc (PM)	A	Dividend			Buy (add'l)	03/10/23	J		
176.					Sold	06/23/23	J		
177. PNC Finl Svcs Inc (PPG)	A	Dividend			Sold	06/23/23	J		
178. PPG Industries Inc (PPG) (X)	A	Dividend			Sold	06/23/23	J	A	
179. Proctor & Gamble (PG)	A	Dividend			Buy (add'l)	03/10/23	J		
180.					Sold	06/23/23	J	A	
181. Prudential Financial Inc (PRU)		None			Buy	03/10/23	J		
182.					Sold	04/18/23	J		
183. Public Storage (PSA)	A	Dividend			Buy	03/10/23	J		
184.					Sold	06/23/23	J		
185. Qualcomm Inc (QCOM) (X)	A	Dividend			Sold (part)	03/10/23	K		
186.					Sold	06/23/23	J		
187. Realty Income Corp (O) (X)	A	Dividend			Sold	03/10/23	K	C	

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188. Relx PLC Sponsered ADR (RELX)	A	Dividend			Buy	03/10/23	J		
189.					Sold	06/23/23	J	A	
190. Ryanair Hldgs PLC ADR (RYAAY)		None			Buy	03/10/23	J		
191.					Sold	06/23/23	J	A	
192. S&P Global Inc Com (SPGI)	A	Dividend			Buy	03/10/23	J		
193.					Sold	06/23/23	J	A	
194. Sap AG (SAP)	A	Dividend			Buy	03/10/23	J		
195.					Sold	06/23/23	J	A	
196. Sempra (SRE)	A	Dividend			Buy	03/10/23	J		
197.					Sold	06/23/23	J		
198. Shell PLC ADR (SHEL) (X)	A	Dividend			Sold (part)	03/07/23	L	B	
199.					Sold	03/10/23	K	B	
200. Skyworks Solutions Inc (SWKS) (X)	A	Dividend			Sold	03/10/23	K		
201. Taiwan Smcndctr Mfg (TSM)	A	Dividend			Buy	03/10/23	J		
202.					Sold	06/23/23	J	A	
203. Target Corporation (TGT) (Y)									
204. The Cigna Group (CI) (X)	A	Dividend			Sold	06/23/23	J		

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205. Texas Instruments (TXN)	A	Dividend			Buy (add'l)	03/10/23	J		
206.					Sold	06/23/23	J		
207. TJX Cos Inc New (TJX)	A	Dividend			Buy	03/10/23	J		
208.					Sold	06/23/23	J	A	
209. Totalenergies SE Sponsered Ads (TTE)	A	Dividend			Buy	03/10/23	J		
210.					Sold	06/23/23	J		
211. Trane Technologies Plc (TT)	A	Dividend			Sold	06/23/23	J	A	
212. UBS Group AG SHS (UBS)	A	Dividend			Buy	03/10/23	J		
213.					Sold	06/23/23	J		
214. Unilever PLC (UL)	A	Dividend			Buy	03/27/23	J		
215.					Sold	06/23/23	J	A	
216. US Bancorp Com (USB)	A	Dividend			Sold	03/20/23	J		
217. Union Pacific Corp (UNP)	A	Dividend			Sold	06/23/23	J		
218. United Parcel Ser Inc (UPS)	A	Dividend			Buy (add'l)	03/10/23	J		
219.					Sold	06/23/23	J		
220. United Health Gp Inc (UNH)	A	Dividend			Buy (add'l)	03/10/23	J		
221.					Sold	06/23/23	J		

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222. Valero Energy Cp Dela New (VLO)	A	Dividend			Sold	06/23/23	J		
223. Verizon Communications (VZ) (X)	A	Dividend			Sold (part)	03/10/23	J		
224.					Sold	06/23/23	J		
225. Visa Inc Cl A (V)	A	Dividend			Buy	03/10/23	J		
226.					Buy (add'l)	04/25/23	J		
227.					Sold	06/23/23	J	A	
228. Walmart Inc (WMT)	A	Dividend			Buy	03/10/23	J		
229.					Sold	06/23/23	J	A	
230. Waste Mgmt Inc (WM)	A	Dividend			Sold	06/23/23	J	A	
231. Wells Fargo & Co New (WFC)	A	Dividend			Buy	04/18/23	J		
232.					Sold	06/23/23	J		
233. Invesco QQQ Trust (QQQ)	A	Dividend	K	T					
234. iShares MSCI Euro Financial (EUFN)	A	Dividend			Buy	03/10/23	J		
235.					Sold	06/23/23	J		
236. iShares MSCI Hong Kong ETF (EWH)	A	Dividend			Buy	03/10/23	J		
237.					Sold	06/23/23	J		
238. iShares MSCI South Korea ETF (EWY)		None			Buy	03/10/23	J		

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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	
	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
Lorenz, Myron J.	08/13/2024

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)	
239.					Sold	06/23/23	J	A	
240. Vanguard Mid-Cap ETF Index (VO)	A	Dividend	K	T	Buy (add'l)	03/10/23	J		
241. Vanguard Total Intl Stock ETF (VXUS)	A	Dividend	K	T	Buy (add'l)	12/15/23	J		
242. Wisdomtree TR Emer Mkt High FD (DEM)	A	Dividend			Buy	03/10/23	J		
243.					Sold	06/23/23	J	A	
244. American Funds Capital World Growth & Inc Fund Class F-2 (WGIFX) (X)	C	Dividend	L	T					
245. American Funds Global Insight F2 (AGVGX)	A	Dividend	L	T	Buy	06/23/23	L		
246.					Buy (add'l)	12/15/23	J		
247. American Funds The Investment Company of America (ICAFX)	D	Dividend	L	T					
248. Columbia Dividend Income Inst (GSFTX)	D	Dividend	M	T	Buy	06/23/23	M		
249.					Buy (add'l)	12/15/23	J		
250.					Buy (add'l)	12/21/23	J		
251. Hartford Dividend & Growth I (HDGIX)	C	Dividend	M	T	Buy	06/23/23	M		
252.					Buy (add'l)	12/21/23	J		
253. BlackRock Mid-Cap Growth Equity Port. Inst'l Shares (CMGIX)		None			Sold	03/10/23	J		
254. Invesco Equally-Weighted S&P 500 Fund (VADDX)	C	Dividend	L	T	Buy (add'l)	03/10/23	J		
255.					Buy (add'l)	12/21/23	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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Name of Person Reporting	Date of Report
Lorenz, Myron J.	08/13/2024

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)	
256. MFS Growth Fund (MFEIX)	C	Dividend	L	T	Buy (add'l)	03/10/23	J		
257. MSIF Global Opportunity Portfolio (MGGIX)	B	Dividend	K	T	Sold (part)	03/10/23	K		
258. MSIF International Opportunity Portfolio (MIOIX)		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; 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
Lorenz, Myron J.	08/13/2024

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.

Name of Person Reporting	Date of Report
Lorenz, Myron J.	08/13/2024

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. § 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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Washington, D.C. 20544