AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

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	08/18/2025
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	01/01/2024 **to** 12/31/2024
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.	08/18/2025

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. Invesco QQQ Trust (QQQ)	A	Dividend	K	T	Sold (part)	12/13/24	J	B	
6. Vanguard Dividend Appreciation Index Fund (VIG)	A	Dividend	J	T					
7. Vanguard Mid-Cap Index Fund ETF (VO)	A	Dividend	K	T	Sold (part)	12/13/24	J	A	
8. Vanguard S&P 500 ETF (VOO)	A	Dividend	K	T	Sold (part)	12/13/24	J	B	
9. Vanguard Total World Stock Index Fund ETF (VT)	A	Dividend	K	T	Sold (part)	12/13/24	J	A	
10. BlackRock Mid-Cap Growth Equity Portfolio Institutional Shares (CMGIX)		None	K	T	Sold (part)	12/13/24	J	A	
11. Columbia Dividend Income Fund Institutional Class (GSFTX)	D	Dividend	L	T	Buy (add'l)	12/16/24	J		
12. PGIM Jennison Global Opportunities Fund (PRJZX)	B	Dividend	K	T	Sold (part)	12/13/24	J	A	
13. Account #2 (H)									
14. Columbia Dividend Income Fund Class C (LBSCX)	B	Dividend	K	T					
15. MFS Growth Fund Class C (MFECX)	D	Dividend	K	T	Sold (part)	12/17/24	J	A	
16. MSIF Global Franchise Portfolio (MSGFX)	C	Dividend	K	T					
17. MSIF Global Opportunity Portfolio C (MSOPX)	B	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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18. Account #3 (H)									
19. Morgan Stanley Bank (cash)	A	Interest	K	T					
20. MSPBNA preferred savings (cash) (X)	B	Interest	K	T					
21. Amazon Com Inc (AMZN)		None	M	T					
22. Apple Inc (AAPL)	A	Dividend	M	T					
23. Applied Materials Inc. (AMAT)	A	Dividend	L	T					
24. Microsoft Corp (MSFT)	A	Dividend	M	T					
25. Tesla Inc (TSLA)		None	K	T					
26. Unit First Trust S&P Dividend Aristocrats Buy-Write 28 [redacted]	C	Interest	M	T					
27. Blackstone BREIT	D	Distribution	M	T					
28. NH PIF Class S Sec	D	Distribution	M	T					
29. Partners Group PE - A ESC		None	L	T					
30. Starwood Real Estate Income	B	Distribution	K	T					
31. Account #4 (H)									
32. Morgan Stanley Bank (cash)	A	Interest	J	T					
33. Invesco QQQ Trust (QQQ)	A	Dividend	K	T					
34. Vanguard FTSE Developed Mkts E (VEA)	A	Dividend	K	T	Buy (add'l)	12/16/24	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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35. Vanguard Mid-Cap ETF Index (VO)	A	Dividend	K	T					
36. Vanguard Total Intl Stock ETF (VXUS)	A	Dividend	K	T					
37. American Cap Wrld Gr & Inc F-2 (WGIFX)	D	Dividend	M	T	Buy (add'l)	12/18/24	J		
38.					Buy (add'l)	12/19/24	J		
39. American Funds Global Insight F2 (AGVGX)	A	Dividend	L	T	Buy (add'l)	12/19/24	J		
40. American Inv Co of Amer F2 (ICAFX)	D	Dividend	M	T					
41. Columbia Dividend Income Inst (GSFTX)	D	Dividend	M	T	Buy (add'l)	12/18/24	J		
42.					Buy (add'l)	12/19/24	J		
43. Hartford Dividend & Growth I (HDGIX)	E	Dividend	M	T	Buy (add'l)	12/13/24	J		
44.					Buy (add'l)	12/18/24	J		
45.					Buy (add'l)	12/19/24	J		
46. Invesco Equally-Weighted S&P 500 Fund (VADDX)	D	Dividend	L	T	Buy (add'l)	12/18/24	J		
47.					Buy (add'l)	12/20/24	J		
48. MFS Growth Fund (MFEIX)	D	Dividend	M	T					
49. MSIF Global Opportunity Portfolio (MGGIX)	D	Dividend	L	T					
50. MSIF Intl Opportunity Portfolio (MIOIX)	A	Dividend	J	T	Sold (part)	12/16/24	K		

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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.

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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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Washington, D.C. 20544