Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Lorenz, M. James
U.S. District Court - California Southern
Senior District Judge

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

/s/ Lorenz, M. James [electronically signed on Sep 4, 2026 3:26pm by Lorenz, M. James in JEFS]
/s/ Lorenz, M. James [electronically signed on Sep 3, 2026 1:20pm by Lorenz, M. James in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Trust #1	Trust	Trustee
	Additional Explanation: Reportable assets listed in Part VII.		
2.	Board of Advisors of Marine Corps Recruit Depot Museum & Historical Society	Non-Profit	Member

II. Agreements

I do not have any Agreements to report
No entries in this section

III A. Filer Non-Investment Income

I do not have any Filer Non-Investment Income to report
No entries in this section

III B. Spouse Non-Investment Income

I do not have any Spouse Non-Investment Income to report
No entries in this section

IV. Reimbursements

I do not have any Reimbursements to report
No entries in this section

V. Gifts

I do not have any Gifts to report
No entries in this section

VI. Liabilities

I do not have any Liabilities to report
No entries in this section

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**(H) Individual Assets**				
1-A.	Wells Fargo Bank (cash)		None	$15,001 - $50,000	Cash/Market
1-B.	Real Estate Parcel #1, San Diego County, CA		None	$1,000,001 - $5,000,000	Estimated
2.	**(H) Account #1**				
2-A.	Invesco QQQ Trust (QQQ)	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,000 or less

2-B.	Vanguard Dividend Appreciation Index Fund (VIG)	$1,000 or less	Dividend	$15,000 or less	Cash/Market
2-C.	Vanguard Mid-Cap Index Fund ETF (VO)	$1,000 or less	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,000 or less

2-D.	Vanguard S&P 500 ETF (VOO)	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,000 or less

2-E.	Vanguard Total World Stock Index Fund ETF (VT)	$1,001 - $2,500	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,000 or less

2-F.	BlackRock Mid-Cap Growth Equity Portfolio (CMGIX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jul 21, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 11, 2025	$15,000 or less
(3).	Buy (add'l)	Dec 16, 2025	$15,000 or less

2-G.	Columbia Dividend Income Fund Institutional Class (GSFTX)	$2,501 - $5,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,000 or less

2-H.	PGIM Jennison Global Opportunities Fund (PRJZX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 15, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 16, 2025	$15,000 or less

3.	**(H) Account #2**				

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
3-A.	Columbia Dividend Income Fund Class A (LBSAX)	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
3-B.	MFS Growth Fund Class A (MFEGX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
3-C.	MSIF Global Franchise Portfolio A (MSFBX)	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,000 or less

3-D.	MSIF Global Opportunity Portfolio A (MGGPX)	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market

4. **(H) Account #3**

4-A.	MSPBNA preferred savings (cash)	$1,001 - $2,500	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Closed	May 21, 2025	$100,001 - $250,000

4-B.	Amazon Com Inc (AMZN)		None	$100,001 - $250,000	Cash/Market
4-C.	Apple Inc (AAPL)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
4-D.	Applied Materials Inc. (AMAT)	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
4-E.	Microsoft Corp (MSFT)	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
4-F.	Tesla Inc (TSLA)		None	$15,001 - $50,000	Cash/Market
4-G.	Unit First Trust S&P Dividend Aristocrats Buy-Write 28	$2,501 - $5,000	Gain		

Additional Explanation: There was a realized gain as a result of a redemption.

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Redeemed	Jan 23, 2025	$100,001 - $250,000

4-H.	NH PIF Class Sec	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
4-I.	Ares PMF - Class A Esc		None	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 28, 2025	$50,001 - $100,000

4-J.	Partners Group PE - A ESC	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
4-K.	Blackstone BREIT	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
4-L.	FT BSP RE Debt Class G Esc	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	May 28, 2025	$50,001 - $100,000

4-M.	Starwood Real Estate Income	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

5. **(H) Account #4**

5-A.	Morgan Stanley Bank (cash)	$1,000 or less	Interest	$15,000 or less	Cash/Market
5-B.	Invesco QQQ Trust (QQQ)	$2,501 - $5,000	Dividend,Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,000 or less

5-C.	Vanguard FTSE Developed Mkts E (VEA)		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Jan 16, 2025	$15,001 - $50,000

5-D.	Vanguard Mid-Cap ETF Index (VO)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
5-E.	Vanguard Total Intl Stock ETF (VXUS)	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
5-F.	American Cap Wrld Gr & Inc F-2 (WGIFX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 18, 2025	$15,000 or less

5-G.	American Funds Global Insight F2 (AGVGX)	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
5-H.	American Inv Co of Amer F2 (ICAFX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 18, 2025	$15,000 or less

5-I.	Columbia Dividend Income Inst (GSFTX)	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 15, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 18, 2025	$15,000 or less

5-J.	Hartford Dividend & Growth I (HDGIX)	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 15, 2025	$15,001 - $50,000
(2).	Buy (add'l)	Dec 18, 2025	$15,000 or less

5-K.	Invesco Equally-Weighted S&P 500 Fund (VADDX)	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 15, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 18, 2025	$15,000 or less
(3).	Buy (add'l)	Dec 22, 2025	$15,000 or less

5-L.	MFS Growth Fund (MFEIX)	$15,001 - $50,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Dec 18, 2025	$15,000 or less

5-M.	MSIF Global Opportunity Portfolio (MGGIX)	$5,001 - $15,000	Dividend,Gain	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold (part)	Oct 16, 2025	$15,000 or less
(2).	Buy (add'l)	Dec 18, 2025	$15,000 or less

5-N.	MSIF Intl Opportunity Portfolio (MIOIX)	$1,000 or less	Gain	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy (add'l)	Jan 16, 2025	$15,001 - $50,000
(2).	Sold (part)	Feb 18, 2025	$15,000 or less

VIII. Additional Information or Explanations

I do not have any Additional Information to report
No entries in this section