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
Lund, Gretchen S.	United States District Court Northern District of Indiana	05/14/2025
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**
United States District Court Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final	01/01/2024 **to** 12/31/2024
	5b. ☐ Amended Report	
7. Chambers or Office Address		
5400 Federal Plaza Hammond, IN 46320		

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.	Judge	Elkhart County Superior Court 4
2.	Director	Indiana Judicial Conference
3.	Member	Indiana Judges Association
4.	Member	Indiana State Bar Association
5.	Member	Goshen Bar Association

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.	2006	Indiana Public Employees' Retirement Fund: Defined Contribution Plan
2.	2016	Indiana Judges' Retirement Fund: Judicial Pension
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.	2024	State of Indiana: Judge Elkhart County Superior Court 4, salary	$7,019.01
2.	2024	U.S. District Court Judge	$203,912.65
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.	2024	[redacted] (Partner)
2.	2024	[redacted] (Partner)
3.	2024	[redacted] (Partner)
4.	2024	[redacted]

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.	[redacted]	Lease of [redacted] Apartment in College	J
2.	[redacted]	Lease of [redacted] Apartment in College	J
3.	Chase Bank	Credit Card	J
4.			
5.			

Name of Person Reporting	Date of Report
Lund, Gretchen S.	05/14/2025

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.	First State Bank of Middlebury Cash Accounts	A	Interest	M	T					
2.	KeyBank Cash Accounts	A	Interest	L	T					
3.	Interra Credit Union Cash Accounts	A	Interest	J	T					
4.	College Choice 529 Plan #1 - 2024 Enrollment Portfolio Fund	C	Dividend	J	T					
5.	College Choice 529 Plan #2 - 2027 Enrollment Portolio Fund	C	Dividend	K	T					
6.	Indiana Public Employees' Retirement Fund (H)									
7.	- BlackRock Large Cap Equity Index Fund	C	Dividend	K	T					
8.	- iShares Small/Mid Cap Equity Fund	B	Dividend	J	T					
9.	- BlackRock International Equity Fund	A	Dividend	J	T					
10.	Indiana Deferred Compensation Plan - Nationwide Target Date 2040 Fund	D	Dividend	L	T					
11.	Northwestern Mutual FDIC Insured Deposit Program #1	A	Interest	J	T					
12.	Northwestern Mutual FDIC Insured Deposit Program #2	A	Interest	J	T					
13.	IRA #1 (H)									
14.	- iShares TR Core S&P 500 ETF	A	Dividend	K	T	Sold (part)	04/08/24	J	A	
15.	- Vanguard BD Index FDS Total Bond Market	A	Dividend	J	T	Buy (add'l)	04/08/24	J		
16.						Sold (part)	06/24/24	J	A	
17.	- Schwab Strategic TR International Equity ETF	A	Dividend	J	T	Sold (part)	04/08/24	J	A	

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
Lund, Gretchen S.	05/14/2025

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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. - Oakmark Select Fund Advisor Class	A	Dividend	J	T					
19. - iShares TR Core S&P MCP ETF	A	Dividend	J	T					
20. - FMI International Fund Institutional Class	A	Dividend	J	T	Sold (part)	10/28/24	J	A	
21. - American Bond Fund of America Class F2	A	Dividend	J	T	Buy	09/03/24	J		
22. - PIMCO Income 1-2	A	Dividend	J	T	Buy (add'l)	04/08/24	J		
23. - Goldman Sachs International Small-Cap Insights Fund	A	Dividend	J	T					
24. - Cohen & Steers Real Estate Securities Fund Class I	A	Dividend	J	T					
25. - iShares TR Core S&P Small-Cap ETF	A	Dividend	J	T					
26. - iShares Inc MSCI Eurozone ETF	A	Dividend	J	T					
27. - Fidelity Merrimack STR TR BD ETF	A	Dividend	J	T	Buy	10/28/24	J		
28. - iSharesTR MSCI USA Value Factor ETF	A	Dividend	J	T					
29. - Fidelity Advisor Total Bond Fund Class I	A	Dividend			Sold	10/28/24	J	A	
30. - Vanguard Intl Equity Index FDS FTSE Emerging Markets ETF	A	Dividend	J	T					
31. - PIMCO Commodities Plus Strategy 1-2	A	Dividend	J	T					
32. - Column Mid-Cap Select Fund	A	Dividend	J	T	Buy	01/16/24	J		
33.					Buy (add'l)	01/29/24	J		
34. - Colum Small-Cap Select Fund	A	Dividend	J	T	Buy	01/16/24	J		

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35.						Buy (add'l)	01/29/24	J		
36.	- Invesco Exchange FD TR TS&P 500 Equal Weight	A	Dividend	J	T	Buy	04/08/24	J		
37.	- Western Asset Core Bond Fund Class I	A	Dividend			Sold	09/03/24	J	A	
38.	- Brown Capital Small Company Fund Instituional Class	A	Dividend			Sold (part)	01/16/24	J	A	
39.						Sold	01/30/24	J	A	
40.	- Parnassus FD Mid Cap Instl	A	Dividend			Sold (part)	01/16/24	J	A	
41.						Sold	01/29/24	J	A	
42.	- New World Fund	A	Dividend	J	T					
43.	- iShares TR 20 YR TR BD ETF	A	Dividend	J	T	Buy	06/24/24	J		
44.	IRA #2 (H)									
45.	- iShares TR Core S&P 500 ETF	A	Dividend	J	T	Sold (part)	01/29/24	J	A	
46.						Sold (part)	04/08/24	J	A	
47.	- Oakmark Select Fund Advisor Class	A	Dividend	J	T					
48.	- Goldman Sachs International Small-Cap Insights Fund	A	Dividend	J	T					
49.	- FMI International Fund Institutional Class	A	Dividend	J	T	Sold (part)	10/28/24	J	A	
50.	- Parnassus Mid-Cap Fund Institutional Class	A	Dividend			Sold (part)	01/16/24	J	A	
51.						Sold	01/29/24	J	A	

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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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52. - PIMCO Income 1-2	A	Dividend	J	T					
53. - Cohen & Steers Real Estate Securities Fund Class I	A	Dividend	J	T					
54. - iShares TR MSCI USA Value Factor ETF	A	Dividend	J	T					
55. - American New World Fund Class F2	A	Dividend	J	T					
56. - iShares TR Core S&P Small-Cap ETF	A	Dividend	J	T					
57. - iShares Inc MSCI Eurozone ETF	A	Dividend	J	T					
58. - Fidelity Advisor Total Bond Class	A	Dividend			Sold	10/28/24	J		
59. - Vanguard Intl Equity Index FDS FTSE Emerging Markets ETF	A	Dividend	J	T					
60. - PIMCO Commodities Plus Strategy 1-2	A	Dividend	J	T					
61. - Brown Capital Small Company Fund Institutional Class	A	Dividend			Sold (part)	01/17/24	J	A	
62.					Sold	01/30/24	J	A	
63. - Western Asset Core Bond Fund Class I	A	Dividend			Sold	09/03/24	J	A	
64. - Vanguard BD Index FDS Total Bond Market	A	Dividend	J	T	Buy (add'l)	04/08/24	J		
65.					Sold (part)	06/24/24	J	A	
66. - Schwab Strategic TR International Equity ETF	A	Dividend	J	T					
67. - iShares TR Core S&P MCP ETF	A	Dividend	J	T	Sold (part)	04/08/24	J	A	
68. - Column Mid-Cap Select Fund	A	Dividend	J	T	Buy	01/16/24	J		

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69.						Buy (add'l)	01/29/24	J		
70.	- Column Small-Cap Select Fund	A	Dividend	J	T	Buy	01/16/24	J		
71.						Buy (add'l)	01/29/24	J		
72.	- Fidelity Merrimack Str TR Total BD ETF	A	Dividend	J	T	Buy	10/28/24	J		
73.	- iShares TR 20 YR BD ETF	A	Dividend	J	T	Buy	06/24/24	J		
74.	- Invesco Exchange Traded FD TR S&P 500 Equal Weight ETF	B	Dividend	J	T	Buy	04/08/24	J		
75.	- American Bond Fund of America Class F2	A	Dividend	J	T	Buy	09/03/24	J		
76.	Roth IRA #1 (H)									
77.	- The Investment Company of America	B	Dividend	J	T					
78.	Roth IRA #2 (H)									
79.	- The Investment Company of America	B	Dividend	J	T					
80.	ABA Voya Retirement Account (H)									
81.	- State Street Global Advisors Bond Index R2	A	Dividend	K	T	Buy (add'l)	05/09/24	J		
82.						Buy (add'l)	11/07/24	J		
83.	- State Street Global Advisors Bond Core Plus R2	A	Dividend	K	T	Buy	11/07/24	J		
84.	- State Street Global Advisors Large-Cap Index Equity R2	E	Dividend	M	T	Buy	05/09/24	J		
85.						Buy (add'l)	05/10/24	K		

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86.					Sold (part)	11/07/24	J		
87. - State Street Global Advisors Large-Cap Equity R2	C	Dividend			Sold (part)	05/09/24	J		
88.					Sold	05/10/24	K		
89. - State Street Global Advisors Small-Mid Cap Index Equity R2	E	Dividend	M	T	Sold (part)	05/09/24	J		
90. - State Street Global Advisors International All Cap Equity Fund R2	C	Dividend	L	T					
91. - State Street Global Advisors International Index Equity Fund R2	D	Dividend	M	T					
92. Northwestern Mutual Variable Universal Life Plus	B	Dividend	J	T					

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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Name of Person Reporting	Date of Report
Lund, Gretchen S.	05/14/2025

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/ Gretchen S. Lund

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
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544