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
Lungstrum, John W.	United States District Court, District of Kansas	03/29/2024
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		
517 U.S. Courthouse 500 State Avenue Kansas City, KS 66101		

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.	
2.	
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.	American Bar Association	March 1-5, 2023	Tucson, AZ	CLE Speaker	Transportation, lodging
2.	George Washington University National Law Center	April 26-30, 2023	Washington, DC	CLE Panelist	Transportation, lodging
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
Lungstrum, John W.	03/29/2024

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)	
1. Individual Assets (H)									
2. US Bank (cash)		None	L	T					
3. Account #1 (H)									
4. PERSHING PRIME MONEY MARKET (GMBXX) (cash eq.)	A	Dividend	J	T	Buy	04/11/23	J		
5.					Sold (part)	05/09/23	J		
6.					Buy (add'l)	05/11/23	J		
7.					Buy (add'l)	10/16/23	J		
8.					Sold (part)	10/26/23	J		
9.					Buy (add'l)	11/09/23	K		
10.					Sold (part)	11/29/23	K		
11. PERSHING GOVERNMENT ACCOUNT (DGUXX) (cash eq.)	A	Dividend			Sold	04/11/23	J		
12. GQG PARTNERS EMERGING MARKETS EQUITY FUND INSTITUTIONAL (GQGIX)	A	Dividend	J	T	Buy	11/27/23	J		
13. FS MULTI-STRATEGY ALTERNATIVES FUND CLASS I (FSMSX)	A	Dividend	J	T	Buy	05/05/23	J		
14.					Buy (add'l)	05/08/23	J		
15.					Sold (part)	11/06/23	J	A	
16.					Sold (part)	11/27/23	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
Lungstrum, John W.	03/29/2024

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)	
17.	BAILLIE GIFFORD INTERNATIONAL ALPHA FUND CLASS K (BGIKX)		None			Sold (part)	11/06/23	J		
18.						Sold	11/27/23	K		
19.	BLACKROCK EVENT DRIVEN EQUITY FUND INSTITUTIONAL CLASS (BILPX)	A	Dividend	J	T	Sold (part)	11/06/23	J		
20.						Sold (part)	11/27/23	J	A	
21.	BLACKROCK TOTAL RETURN FUND CLASS K (MPHQX)	A	Dividend	K	T	Buy	11/27/23	K		
22.	BLACKSTONE ALTERNATIVE MULTI-STRATEGY FUND CLASS Y (BXMYX)		None			Sold	05/05/23	J		
23.	BLACKROCK GLOBAL EQUITY MARKET NEUTRAL FUND CLASS K (BGCKX)	A	Dividend			Sold (part)	11/06/23	J	A	
24.						Sold	11/27/23	J		
25.	DODGE & COX INCOME FUND CLASS I (DODIX)	A	Dividend	K	T	Buy	11/27/23	K		
26.	HARDING LOEVNER INTERNATL EQUITY PORTFOLIO INSTITUTIONAL CLASS (HLMIX)	A	Dividend	J	T	Buy	11/27/23	J		
27.	THRIVENT SMALL-CAP STOCK FUND CLASS S (TSCSX)		None	J	T	Buy	11/27/23	J		
28.	VANGUARD CASH RESERVES FEDERAL MONEY MARKET (VMRXX) (cash eq.)	A	Dividend	J	T	Buy	11/27/23	J		
29.	ISHARES TR S&P 100 ETF ALLOCATED ORDER (OEF)	A	Dividend	J	T	Buy	11/27/23	J		
30.	ISHARES TR S&P 500 GROWTH ETF (IVW)	A	Dividend	K	T	Buy	11/27/23	K		
31.	BLACKROCK STRATEGIC INCOME OPPORTUNITIES PORTFOLIO CLASS K (BSIKX)	B	Dividend			Sold (part)	10/09/23	J		
32.						Sold (part)	11/06/23	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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☐ 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)	
33.						Sold	11/27/23	J		
34.	WILLIAM BLAIR EMERGING MARKETS GROWTH FUND CLASS I (WBEIX)		None			Sold (part)	11/06/23	J		
35.						Sold	11/27/23	J		
36.	DFA GLOBAL REAL ESTATE SECURITIES PORTFOLIO (DFGEX)		None			Buy	04/19/23	J		
37.						Sold (part)	11/06/23	J		
38.						Sold	11/27/23	J		
39.	FIDELITY ADVISOR TOTAL BOND FUND CLASS Z (FBKWX)	A	Dividend			Sold (part)	11/06/23	J		
40.						Sold	11/27/23	J		
41.	PIMCO REAL RETURN FUND INSTITUTIONAL CLASS (PRRIX)	A	Dividend			Sold (part)	11/06/23	J		
42.						Sold	11/27/23	J		
43.	PRINCIPAL GLOBAL REAL ESTATE SECURITIES FUND INSTITUTIONAL (POSIX)		None			Sold	04/19/23	J		
44.	ISHARES TR S&P 500 GROWTH ETF (IVW)	A	Dividend	K	T	Buy	11/27/23	K		
45.	ISHARES TR GLOBAL ENERGY ETF (IXC)	A	Dividend	J	T	Buy	11/27/23	J		
46.	ISHARES TR S&P 500 VALUE ETF (IVE)	A	Dividend	K	T	Buy	11/27/23	K		
47.	ISHARES TR RUSSELL MID-CAP ETF (IWR)	B	Dividend	J	T	Sold (part)	11/06/23	J	A	
48.						Sold (part)	11/27/23	J	B	

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49.	ISHARES TR 10-20 YR TREAS BD ETF (TLH)	A	Dividend	J	T	Buy	11/27/23	J		
50.	ISHARES TR CORE S&P SMALL-CAP ETF (IJR)	A	Dividend			Sold (part)	11/06/23	J		
51.			Dividend			Sold	11/27/23	K		
52.	ISHARES TR MSCI EAFE VALUE ETF (EFV)	A	Dividend	J	T	Buy	11/27/23	J		
53.	ISHARES TR MSCI EAFE GROWTH ETF (EFG)	A	Dividend	J	T	Buy	11/27/23	J		
54.	ISHARES INC MSCI EMERGING MKTS EX CHINA ETF (EMXC)	A	Dividend	J	T	Buy	11/27/23	J		
55.	ISHARES TR CORE MSCI EAFE ETF (IEFA)	A	Dividend			Sold (part)	11/06/23	J		
56.						Sold	11/27/23	K	A	
57.	SELECT SECTOR SPDR TR HEALTH CARE (XLV)	A	Dividend			Sold (part)	11/06/23	J		
58.						Sold	11/27/23	J		
59.	SIMPLIFY EXCHANGE TRADED FDS SIMPLIFY MANAGED FUTURES (CTA)	A	Dividend			Sold	05/08/23	J		
60.	VANGUARD INFORMATION TECHNOLOGY ETF (VGT)	B	Dividend	J	T	Sold (part)	11/06/23	J	B	
61.						Buy (add'l)	11/27/23	J		
62.	VANGUARD INDEX FDS S&P 500 ETF SHS NEW(VOO)	D	Dividend	L	T	Sold (part)	11/06/23	J	C	
63.						Sold (part)	11/27/23	J	B	
64.	VANGUARD INDEX FDS VANGUARD VALUE ETF (VTV)	C	Dividend			Sold (part)	11/06/23	J		
65.						Sold	11/27/23	J	B	

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66. Account #2 (H)									
67. PERSHING PRIME MONEY MARKET (GMBXX) (cash eq.)	A	Dividend	J	T	Buy	04/11/23	J		
68.					Sold (part)	04/17/23	J		
69.					Buy (add'l)	05/02/23	J		
70.					Buy (add'l)	06/02/23	J		
71.					Buy (add'l)	07/05/23	J		
72.					Buy (add'l)	08/02/23	J		
73.					Sold (part)	08/07/23	J		
74.					Buy (add'l)	09/05/23	J		
75.					Sold (part)	10/23/23	J		
76.					Buy (add'l)	11/02/23	J		
77.					Buy (add'l)	12/04/23	J		
78.					Buy (add'l)	12/12/23	J		
79.					Sold (part)	12/18/23	J		
80.					Buy (add'l)	12/21/23	J		
81. BNY MELLON NA INSURED DEP ACCT (cash)	A	Dividend			Closed	04/11/23	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
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82.	FS MULTI STRATEGY ALTERNATIVIES FUND CLASS I (FSMSX)	A	Dividend	K	T	Buy	05/11/23	K		
83.	BLACKROCK EVENT DRIVEN EQUITY FUND INSTITUTIONAL CLASS (BILPX)	A	Dividend	K	T	Buy (add'l)	05/11/23	J		
84.	BLACKSTONE ALTERNATIVE MULTI-STRATEGY FUND CLASS Y (BXMYX)		None			Sold	05/11/23	K		
85.	BLACKROCK GLOBAL EQUITY MARKET NEUTRAL FUND CLASS K (BGCKX)	B	Dividend	K	T	Buy (add'l)	12/15/23	J		
86.	BLACKROCK STRATEGIC INCOME OPPORT PORTFOLIO CLASS K (BSIKX)	C	Dividend	L	T	Buy (add'l)	05/11/23	J		
87.	BLACKROCK LOW DURATION BOND PORTFOLIO FUND CLASS K (CLDBX)	B	Dividend	K	T					
88.	WILLIAM BLAIR EMERGING MARKETS GROWTH FUND CLASS I (WBEIX)	A	Dividend	K	T	Buy (add'l)	05/11/23	J		
89.	FIDELITY ADVISOR TOTAL BOND FUND CLASS Z (FBKWX)	B	Dividend	K	T					
90.	HARDING LOEVNER INTERNATIONAL EQUITY PORTFOLIO (HLMIX)	C	Dividend	M	T	Sold (part)	05/11/23	J		
91.	PIMCO REAL RETURN FUND INSTITUTIONAL CLASS (PRRIX)	B	Dividend	K	T					
92.	PIMCO INCOME FUND INSTITUTIONAL CLASSS (PIMIX)	B	Dividend	K	T					
93.	T. ROWE PRICE INSTITUTIONAL FLOATING RATE FUND (RPIFX)	C	Dividend	K	T					
94.	VANGUARD EMERGING MARKETS BOND FUND ADMIRAL SHARES (VEGBX)	B	Dividend	K	T					
95.	WASATCH SMALL-CAP VALUE FUND INSTITUTIONAL CLASS (WICVX)	B	Dividend	K	T	Buy (add'l)	05/11/23	J		
96.						Sold (part)	07/21/23	J		
97.	ISHARES TR S&P 500 GROWTH ETF (IVW)	A	Dividend	K	T	Sold (part)	05/11/23	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

Name of Person Reporting	Date of Report
Lungstrum, John W.	03/29/2024

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)	
98. ISHARES TR RUSSELL MID-CAP VALUE ETF (IWS)	A	Dividend	K	T					
99. ISHARES TR S&P MIDCAP 400 GROWTH ETF (IJK)	A	Dividend	K	T					
100. VANGUARD BD INDEX FDS VANGUARD SHORT TERM BD ETF (BSV)	B	Dividend	K	T					
101. VANGUARD INDEX FDS VANGUARD VALUE EFT (VTV)	B	Dividend	L	T	Buy	05/11/23	J		
102. Account #3 (H)									
103. PERSHING PRIME MONEY MARKET (cash eq.)	A	Dividend	J	T	Buy	04/11/23	J		
104. PERSHING GOVERNMENT ACCOUNT (DGUXX) (cash eq.)	A	Dividend			Sold	04/11/23	J		
105. FS MULTI-STRATEGY ALTERNATIVES FUND CLASS I (FSMSX) (X)	A	Dividend	J	T					
106. BAILLIE GIFFORD INTERNATIONAL ALPHA FUND CLASS K (BGIKX)		None	J	T					
107. BLACKROCK EVENT DRIVEN EQ FUND INSTIT CLASS (BILPX)		None	J	T					
108. BLACKROCK GLOBAL LONG/SHORT EQUITY FUND CLASS K (BGCKX)	A	Dividend	J	T					
109. BLACKROCK STRATEGIC INCOME OPPORTUNITIES PORTFOLIO (BSIKX)	A	Dividend	J	T					
110. WILLIAM BLAIR EMERGING MARKETS GROWT FUND CLASS I (WBEIX)	A	Dividend	J	T					
111. DFA GLOBAL REAL ESTATE SECURITIES PORTFOLIO (DFGEX)		None	J	T					
112. FIDELITY ADVISOR TOTAL BOND FUND CLASS Z (FBKWX)	A	Dividend	J	T					
113. PIMCO REAL RETURN FUND INSTITUTIONAL CLASS (PRRIX)	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
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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)	
114. T ROWE PRICE ULTRA SHORT TERM BOND FUND ClASS I (TRSTX)	A	Dividend	J	T					
115. VANGUARD SHORT-TERM BOND INDEX FUND ADMIRAL SHARES (VBIRX)	A	Dividend	J	T					
116. ISHARES TR RUSSELL MD-CAP ETF (IWR)	A	Dividend	J	T					
117. ISHARES TR CORE S&P SMALL-CAP ETF (IJR)	A	Dividend	J	T					
118. ISHARES TR CORE MSCI EAFE ETF (IEFA)	A	Dividend	J	T					
119. PIMCO ETF TR ENHANCED SHORT MAT ACTIVE ETF (MINT)	A	Dividend	J	T					
120. VANGUARD WORLD FDS VANGUARD INFORMATION TECHNOLOGY (VGT) (X)	A	Dividend	J	T					
121. VANGUARD INDEX FDS S&P 500 ETF SHS NEW (VOO)	A	Dividend	J	T					
122. VANGUARD INDEX FDS VANGUARD VALUE ETF (VTV)	A	Dividend	J	T					
123. Account #4 (H)									
124. DREYUS MNY MKT FUND SERVICE (GMBXX) (cash eq.)	A	Dividend	J	T	Buy	04/11/23	J		
125.					Sold (part)	05/09/23	J		
126.					Buy (add'l)	05/11/23	J		
127.					Buy (add'l)	07/07/23	J		
128.					Buy (add'l)	10/05/23	J		
129. GOLDMAN SACHS FSQ TR OBL CMS (GTOXX) (cash eq.)	A	Dividend			Sold	04/11/23	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	
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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
Lungstrum, John W.	03/29/2024

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.)*

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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)	
130. FS MULTI-STRATEGY ALTERNATIVES FUND CLASS I (FSMSX)	A	Dividend	J	T	Buy	05/05/23	J		
131.					Buy (add'l)	05/08/23	J		
132. BLACKROCK EVENT DRIVEN EQUITY FUND INSTITUTIONAL FUND (BILPX)	A	Dividend	J	T					
133. BLACKSTONE ALTERNATIVE MULTI-STRATEGY FUND CLASS Y (BXMYX)		None			Sold	05/05/23	J		
134. BLACKROCK GLOBAL EQUITY MARKET NEUTRAL FUND CLASS K (BGCKX)	A	Dividend	J	T					
135. BLACKROCK STRATEGIC INCOME OPPORTUNITIES PORTFOLIO (BSIKX)	A	Dividend	J	T					
136. CLIFFWATER ENHANCED LENDING FUND CLASS I (CELFX)	B	Dividend	J	T					
137. CLIFFWATER CORPORATE LENDING FUND CLASS I (CCLFX)	C	Dividend	K	T					
138. DFA GLOBAL REAL ESTATE SECURITIES PORTFOLIO (DFGEX)	A	Dividend	J	T	Buy	04/18/23	J		
139. DODGE & COX INCOME FUND CLASS I (DODIX)	A	Dividend	J	T					
140. HARDING LOEVNER INTERNATIONAL EQUITY PORTFOLIO (HLMIX)	A	Dividend	J	T					
141. LAZARD GLOBAL LISTED INFRASTRUCTER PORT INST SHARES (GLIFX)	A	Dividend	J	T					
142. NEUBERGER BERMAN GLOBAL REAL ESTATE FUND INSTITUTIONAL (NGRIX)	A	Dividend			Sold	04/18/23	J		
143. PIMCO REAL ETURN FUND INSTITUTIONAL CLASS (PRRIX)	A	Dividend	J	T					
144. T ROWE PRICE INSTITUTIONAL FLOATING RATE FUND (RPIFX)	B	Dividend	K	T					
145. VANGUARD SHORT-TERM BOND INDEX FUND ADMIRAL SHARES (VIBIRX)	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
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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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Name of Person Reporting	Date of Report
Lungstrum, John W.	03/29/2024

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.)*

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146. DBX ETF X-TRACKERS MSCI EAFE HEDGED EQUITY FUND (DBEF)	A	Dividend	J	T					
147. ISHARE INC MSCI EMERGING MKTS MIN VOL FACTOR ETF (EEMV)	A	Dividend	J	T					
148. ISHARES TR CORE S&P 500 ETF (IVV)	A	Dividend	K	T					
149. ISHARES TR RUSSELL MID-CAP ETF (IWR)	A	Dividend	J	T					
150. ISHARES TR RUSSELL 2000 ETF (IWM)	A	Dividend	J	T					
151. ISHARES TR MSCI EAFE VALUE ETF (EFV)	A	Dividend	J	T					
152. ISHARES TR MSCI USA VALUE FACTOR ETF (VLUE)	A	Dividend	J	T					
153. SELECT SECTOR SPDR TR HEALTH CARE (XLV)	A	Dividend	J	T					
154. SIMPLY EXCHANGE TRADED FDS SIMPLY MANAGED FUTURE STRATEGY ETF (CTA)	A	Dividend			Sold	05/08/23	J		
155. VANGUARD MALVERN FD SHORT-TERM INFLOATION PROTECTED SECS INDEX (VTIP)	A	Dividend	J	T					
156. VANGUARD WORLD FDS INFORMATION TECHNOLOGY ETF (VGT)	A	Dividend	J	T					
157. VANGUARD INDEX FDS VANGUARD VALUE ETF (VTV)	A	Dividend	J	T					
158. Account #5 (H)									
159. DREYFUS MONEY MARKET FUND SERVICE (cash eq)	B	Dividend	L	T	Buy	04/11/23	L		
160.					Buy (add'l)	04/14/23	L		
161.					Buy (add'l)	04/27/23	L		

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162.					Buy (add'l)	10/17/23	J		
163.					Buy (add'l)	11/09/23	K		
164. BNY MELLON NA INSURED DEP ACCT (cash)	A	Distribution			Closed	04/11/23	L		
165. DREYFUS PREFERRED GOVERNMENT MONEY MARKET (DSVXX) (cash eq.)	B	Dividend	K	T	Buy	04/26/23	K		
166. UNITED STATES TREAS BILLS 0.000% 04/13/23 (912796YU7)	A	Interest			Redeemed	04/13/23	K		
167. EATON VANCE FLOATING RATE FUND CLASS I (EIBLX)	C	Dividend	K	T					
168. EATON VANCE TAX MANAGED GROWTH FUND I (EITMX)	B	Dividend	M	T					
169. EATON VANCE NATIONAL MUNICIPAL INCOME FUND CLASS I (EIHMX)	A	Dividend	K	T					
170. T ROWE PRICE ULTRA SHORT TERM BOND FUND CLASS I (TRSTX)	B	Dividend	K	T					
171. VANGUARD LIMITED-TERM TAX-EXEMPT FUND ADMIRAL (VMLUX)	B	Dividend	K	T					
172. PIMCO ETF TR ENHANCED SHORT MAT ACTIVE ETF (MINT)	B	Dividend	K	T					
173. BLACKSTONE REAL ESTATE INCOME TRUST INC - CLASS S (PER092563)	B	Dividend	L	T					

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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.

Parenthetical numbers in Part VII are CUSIP numbers.

Name of Person Reporting	Date of Report
Lungstrum, John W.	03/29/2024

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/ John W. Lungstrum

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