AO 10
Rev. 1/2022

# FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

*Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 101-111)*

| 1. Person Reporting (last name, first, middle initial) | 2. Court or Organization | 3. Date of Report |
|---|---|---|
| Magnus-Stinson, Jane E. | US District Court Southern District of Indiana | 3/22/2023 |
| **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** |
| District Judge- active | ☐ Nomination Date<br>☐ Initial ☑ Annual ☐ Final<br>**5b.** ☐ Amended Report | 01/01/2022<br>**to**<br>12/31/2022 |
| **7. Chambers or Office Address** | | |
| Birch Bayh United States Courthouse<br>46 E. Ohio St., Room 204<br>Indianapolis, IN 45204 | | |

***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. | Member, Board of Visitors | Indiana University Robert H. McKinney School of Law |
| 2. | Member, Board of Trustees | Butler University |
| 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. | 1995 | Indiana Judges Retirement Fund, pension upon reaching retirement age |
| 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. | 2022 | Indiana Judges Retirement Fund | $78,504.72 |
| 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. | 2022 | Indiana Publie Employees Retirement Fund, pension |
| 2. | 2022 | Indianapolis Airport Authority, wages |
| 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. | | | | | |

| Name of Person Reporting | Date of Report |
|---|---|
| **Magnus-Stinson, Jane E.** | 3/22/2023 |

## 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. | Capital One | credit card balance | K |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

| Name of Person Reporting | Date of Report |
|---|---|
| **Magnus-Stinson, Jane E.** | 3/22/2023 |

## 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<br>Description of Assets (including trust assets)<br><br>Place "(X)" after each asset exempt from prior disclosure | B<br>Income during reporting period<br>(1) Amount Code 1 (A-H) | B<br>(2) Type (e g , div , rent, or int ) | C<br>Gross value at end of reporting period<br>(1) Value Code 2 (J-P) | C<br>(2) Value Method Code 3 (Q-W) | D<br>Transactions during reporting period<br>(1) Type (e g , buy, sell, redemption) | D<br>(2) Date mm/dd/yy | D<br>(3) Value Code 2 (J-P) | D<br>(4) Gain Code 1 (A-H) | |
|---|---|---|---|---|---|---|---|---|---|
| 1. Vanguard 500 Index Fund | A | Dividend | K | T | | | | | |
| 2. Settlers Life Individual Retirement Annuity | D | Interest | M | T | | | | | |
| 3. Indiana Members Credit Union Accts. | B | Int./Div. | O | T | | | | | |
| 4. Huntington Bank Acct. | A | Interest | K | T | | | | | |
| 5. Old National Bank Acct. | A | Interest | J | T | | | | | |
| 6. IN 529 Age Based Income Portfolio | A | Interest | J | T | Buy (add'l) | 01/07/22 | J | | |
| 7. | | | | | Buy (add'l) | 01/21/22 | J | | |
| 8. | | | | | Distributed (part) | 04/13/22 | J | | |
| 9. | | | | | Distributed (part) | 08/15/22 | J | | |
| 10. | | | | | Distributed (part) | 09/07/22 | J | | |
| 11. IN 529 College Portfolio | A | Interest | J | T | | | | | |
| 12. Charles Schwab Brokerage Account | | | | | | | | | |
| 13. -Schwab Bank Cash | A | Interest | K | T | | | | | |
| 14. -JP Morgan Hedged Equity (JHEQX) | A | Dividend | K | T | Sold (part) | 05/31/22 | J | A | |
| 15. -Janus Henderson Short Duration (VNLA) | A | Dividend | K | T | | | | | |
| 16. -Ishares MSCI (QUAL) | A | Dividend | K | T | | | | | |
| 17. -Doubleline Total Return (DBLTX) | A | Dividend | | | Sold | 05/12/22 | 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 |
|---|---|
| **Magnus-Stinson, Jane E.** | 3/22/2023 |

## 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<br>Description of Assets (including trust assets)<br><br>Place "(X)" after each asset exempt from prior disclosure | B<br>Income during reporting period<br>(1) Amount Code 1 (A-H) | B<br>(2) Type (e g , div , rent, or int ) | C<br>Gross value at end of reporting period<br>(1) Value Code 2 (J-P) | C<br>(2) Value Method Code 3 (Q-W) | D<br>Transactions during reporting period<br>(1) Type (e g , buy, sell, redemption) | D<br>(2) Date mm/dd/yy | D<br>(3) Value Code 2 (J-P) | D<br>(4) Gain Code 1 (A-H) | |
|---|---|---|---|---|---|---|---|---|---|
| 18. -(DFAI) | A | Dividend | J | T | | | | | |
| 19. -(DFAE) | A | Dividend | J | T | | | | | |
| 20. -(SUBYX) | A | Dividend | | | Sold | 05/31/22 | J | A | |
| 21. -TOTL (X) | A | Dividend | J | T | Buy | 05/13/22 | J | | |
| 22. Schwab Brokerage | | | | | | | | | |
| 23. Schwab Bank Cash | A | Interest | J | T | | | | | |
| 24. Charles Schwab IRA | | | | | | | | | |
| 25. Schwab Bank Cash | A | Interest | J | T | | | | | |
| 26. Loomis Sayles Global Bond (LSGLX) | A | Dividend | J | T | | | | | |
| 27. Dodge & Cox Stock (DODGX) | B | Dividend | K | T | | | | | |
| 28. Matthews Asia Dividend (MAPIX) | A | Dividend | J | T | | | | | |
| 29. Neuberger Berman Gensis (NBGNX) | A | Dividend | J | T | | | | | |
| 30. Scout Unconstrained Bond (SUBEX) | A | Dividend | K | T | Buy (add'l) | 09/30/22 | K | | |
| 31. Doubleline Total Return (DBLTX) | A | Dividend | J | T | | | | | |
| 32. JP Morgan Midcap Value | B | Dividend | J | T | | | | | |
| 33. Legg Mason BW Global Bond | A | Dividend | J | T | | | | | |
| 34. Peartree (QUSIX) | 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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| A | B | | C | | D | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Description of Assets (including trust assets) | Income during reporting period | | Gross value at end of reporting period | | Transactions during reporting period | | | | |
| Place "(X)" after each asset exempt from prior disclosure | (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) | |
| 35. Schwab Value Advantage (SWVXX) | B | Dividend | K | T | Buy (add'l) | 09/30/22 | J | | |
| 36. | | | | | Buy (add'l) | 11/23/22 | J | | |
| 37. ICM Small Cap (ICSCX) | B | Dividend | J | T | | | | | |
| 38. American Funds AMCAP (FMACX) | C | Dividend | K | T | | | | | |
| 39. Voya (VCFIX) | A | Dividend | J | T | | | | | |
| 40. Goldman Sachs International (GSIMX) | B | Dividend | K | T | | | | | |
| 41. Charles Schwab IRA - T | | | | | | | | | |
| 42. Schwab Bank Cash | A | Interest | J | T | | | | | |
| 43. Vanguard Short Term Inv (VFSTX) | A | Dividend | K | T | Buy (add'l) | 09/30/22 | K | | |
| 44. American Funds AMCAP (FMACX) | B | Dividend | K | T | | | | | |
| 45. Goldman Sachs Mid Cap Value (GSMCX) | A | Dividend | J | T | | | | | |
| 46. Matthews Asia Dividend (MAPIX) | A | Dividend | J | T | | | | | |
| 47. NB Genesis (NBGNX) | A | Dividend | J | T | | | | | |
| 48. Vanguard Windsor II (VWNFX) | C | Dividend | K | T | Buy (add'l) | 09/30/22 | J | | |
| 49. Doubleline Total Return (DBLTX) | A | Dividend | J | T | | | | | |
| 50. DFA International Value (DFIVX) | A | Dividend | J | T | | | | | |
| 51. Baird Mid Cap (BMDIX) | A | Dividend | J | T | | | | | |

| | | | | | |
|---|---|---|---|---|---|
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|---|---|---|---|---|---|---|---|---|---|
| 52. -Schwab Value Advantage (SWBXX) | A | Dividend | K | T | | | | | |
| 53. -ICM Small Cap (ICFCX) | A | Dividend | J | T | | | | | |
| 54. -Matthews Asia (MINCX) | A | Dividend | J | T | | | | | |
| 55. -Barings EM (BXEYX) | A | Dividend | | | Sold | 03/08/22 | J | A | |
| 56. -Voya (VCFIX) | A | Dividend | J | T | | | | | |
| 57. -JPM Emerging Markets (JMIEX) | A | Dividend | J | T | | | | | |
| 58. -Goldman Sachs (GSIMX) | A | Dividend | J | T | | | | | |
| 59. Charles Schwab Brokerage - T | | | | | | | | | |
| 60. Schwab Bank Cash | A | Interest | J | T | | | | | |
| 61. Schwab Inherited IRA -T (X) | | | | | | | | | |
| 62. FKIQX (X) | A | Dividend | J | T | Open | 04/04/22 | J | | |
| 63. PONAX (X) | A | Dividend | J | T | Open | 04/04/22 | J | | |
| 64. SHEL (X) | A | Dividend | J | T | Open | 04/04/22 | J | | |
| 65. BAICX (X) | A | Dividend | J | T | Open | 04/04/22 | J | | |
| 66. MBSbond (X) | A | Dividend | J | T | Open | 04/04/22 | J | | |
| 67. Schwab Bank Cash | A | Dividend | J | T | Open | 04/04/22 | J | | |
| 68. IAA Retirement Fund | | | | | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| 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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| A | B | | C | | D | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Description of Assets (including trust assets) | Income during reporting period | | Gross value at end of reporting period | | Transactions during reporting period | | | | |
| Place "(X)" after each asset exempt from prior disclosure | (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) | |
| 69. Am Fds Trgt Dte Rtm 2055 R3Fd (X) | A | Dividend | L | T | | | | | |

| | | | | | |
|---|---|---|---|---|---|
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| Name of Person Reporting | Date of Report |
|---|---|
| **Magnus-Stinson, Jane E.** | 3/22/2023 |

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

| Name of Person Reporting | Date of Report |
|---|---|
| **Magnus-Stinson, Jane E.** | 3/22/2023 |

## 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. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.**

**Signature: s/ Jane E. Magnus-Stinson**

**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. § 104)**

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544