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
Magnus-Stinson, Jane E.	US District Court Southern District of Indiana	3/22/2024
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**
District Judge- active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
Birch Bayh United States Courthouse 46 E. Ohio St., Room 204 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.	2023	Indiana Judges Retirement Fund	$82,902.24
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.	2023	Indiana Publie Employees Retirement Fund, pension
2.	2023	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.					

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	J
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Magnus-Stinson, Jane E.	3/22/2024

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.	Vanguard 500 Index Fund	A	Dividend	K	T					
2.	Settlers Life Individual Retirement Annuity	D	Interest	M	T					
3.	Indiana Members Credit Union Accts.	C	Int./Div.	M	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)	02/07/23	J		
7.						Distributed (part)	04/03/23	J		
8.	IN 529 College Portfolio	A	Interest	J	T					
9.	Charles Schwab Brokerage Account -									
10.	-Schwab Bank Cash	A	Interest	K	T					
11.	-JP Morgan Hedged Equity (JHEQX)	A	Dividend	K	T					
12.	-Janus Henderson Short Duration (VNLA)	A	Dividend	J	T	Sold (part)	06/21/23	K	A	
13.	-Ishares MSCI (QUAL)		None			Sold	01/11/23	K	A	
14.	-(DFAI)	A	Dividend	J	T					
15.	-(DFAE)	A	Dividend	J	T					
16.	-TOTL	A	Dividend	J	T					
17.	-FLV (X)	A	Dividend	J	T	Buy	01/11/23	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
Magnus-Stinson, Jane E.	3/22/2024

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)	
18. Schwab Brokerage									
19. Schwab Bank Cash	A	Interest	J	T					
20. Charles Schwab IRA									
21. Schwab Bank Cash	A	Interest	J	T					
22. Loomis Sayles Global Bond (LSGLX)		None			Sold	02/24/23	J	A	
23. Dodge & Cox Stock (DODGX)	B	Dividend	K	T					
24. Matthews Asia Dividend (MAPIX)	A	Dividend			Sold	06/08/23	J	A	
25. Neuberger Berman Gensis (NBGNX)	A	Dividend	J	T					
26. Scout Unconstrained Bond (SUBEX)	B	Dividend	K	T					
27. Doubleline Total Return (DBLTX)	A	Dividend	J	T					
28. JP Morgan Midcap Value	A	Dividend	J	T					
29. Legg Mason BW Global Bond		None			Sold	02/24/23	J	A	
30. Peartree (QUSIX)	A	Dividend	J	T					
31. Schwab Value Advantage (SWVXX)	C	Dividend	K	T	Buy (add'l)	12/29/23	J		
32. ICM Small Cap (ICSCX)	A	Dividend	J	T					
33. American Funds AMCAP (FMACX)	A	Dividend			Sold	07/26/23	L	D	
34. Voya (VCFIX)		None			Sold	02/24/23	J	A	

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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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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)	
35. Goldman Sachs International (GSIMX)	A	Dividend	K	T	Buy (add'l)	06/08/23	J		
36. JPM Large Cap Growth (X)	A	Dividend	L	T	Buy	07/26/23	L		
37. Diamond Hill Core Bond (X)	A	Dividend	K	T	Buy	02/24/23	K		
38. JPM Emerging Markets (X)	A	Dividend	J	T	Buy	06/08/23	J		
39. DFAI (X)	A	Dividend	J	T	Buy	06/08/23	J		
40. Charles Schwab IRA -									
41. Schwab Bank Cash	A	Interest	J	T					
42. Vanguard Short Term Inv (VFSTX)	A	Dividend	K	T					
43. American Funds AMCAP (FMACX)	A	Dividend			Sold	07/26/23	K	D	
44. Goldman Sachs Mid Cap Value (GSMCX)	A	Dividend	J	T					
45. Matthews Asia Dividend (MAPIX)	A	Dividend			Sold	06/08/23	J	A	
46. NB Genesis (NBGNX)	A	Dividend	J	T					
47. Vanguard Windsor II (VWNFX)	B	Dividend	K	T					
48. Doubleline Total Return (DBLTX)	A	Dividend	J	T					
49. DFA International Value (DFIVX)	A	Dividend			Sold	06/08/23	J	A	
50. Baird Mid Cap (BMDIX)	A	Dividend	J	T					
51. -Schwab Value Advantage (SWBXX)	B	Dividend	K	T					

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52. -ICM Small Cap (ICFCX)	A	Dividend	J	T					
53. -Matthews Asia (MINCX)	A	Dividend			Sold	06/08/23	J	A	
54. -Voya (VCFIX)	A	Dividend			Sold	02/24/23	J	A	
55. -JPM Emerging Markets (JMIEX)	A	Dividend	J	T					
56. -Goldman Sachs (GSIMX)	A	Dividend	J	T	Buy (add'l)	06/08/23	J		
57. -DFAI (X)	A	Dividend	J	T	Buy	06/08/23	J		
58. -Diamond Hill Core Bond (X)	A	Dividend	J	T	Buy	02/24/23	J		
59.					Buy (add'l)	03/14/23	J		
60. Charles Schwab Brokerage -									
61. Schwab Bank Cash	A	Interest	J	T					
62. Schwab Inherited IRA -									
63. FKIQX (X)	A	Dividend	J	T					
64. PONAX (X)	A	Dividend	J	T					
65. SHEL (X)	A	Dividend	J	T					
66. BAICX (X)	A	Dividend	J	T					
67. MBSbond (X)	A	Dividend	J	T					
68. Schwab Bank Cash	A	Dividend	J	T					

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69. IAA Retirement Fund									
70. Am Fds Trgt Dte Rtm 2055 R3Fd	D	Dividend	M	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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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Name of Person Reporting	Date of Report
Magnus-Stinson, Jane E.	3/22/2024

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/ 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. § 13106)

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