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
McAuliffe, Steven J.	U.S. District Court - New Hampshire	05/15/2025
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**
U.S. District Judge (Senior)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
Warren B. Rudman U.S. Courthouse 55 Pleasant Street, Room 416 Concord, N.H. 03301		

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.	Fellow	New Hampshire Bar Foundation
2.	Trustee	Trust #1
3.	Member	Shumac, LLC
4.	Member	Pleasant Lake Cottages, LLC
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.					
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.	UBS	Account Secured Premier Credit Line	J
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
McAuliffe, Steven J.	05/15/2025

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		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(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)	
1.	Accts Merrimack County Savings Bank	A	Interest	K	T					
2.	IRA iShares Core S&P	A	Dividend	K	T					
3.	IRA iShares Russell 1000	A	Dividend	M	T					
4.	IRA iShares MSCI EAFE	C	Dividend	L	T					
5.	IRA iBoxx $ Invt	A	Dividend	K	T					
6.	IRA iShares Core US AGG Bond	A	Dividend	K	T					
7.	IRA Vanguard Value	B	Dividend	M	T					
8.	IRA Vanguard Mid-Cap	A	Dividend	K	T					
9.	IRA Vanguard FTSE Emerg Mkts	B	Dividend	K	T					
10.	First Eagle Global Funds Class 1	A	Dividend	J	T	Buy	03/20/24	J		
11.	UBS Retirement Money Fund (UBS Bank USA Dep Acct)	A	Interest	J	T					
12.	UBS Bank USA Dep Acct	A	Dividend	K	T					
13.	Merrimack County Savings Bank NOW Acct (2)	A	Interest	J	T					
14.	iShares TR Russell 2000 Index Fund	B	Dividend	L	T					
15.	iShares Trust Russell Midcap Growth Index Fund	A	Dividend	L	T					
16.	Apple Inc	B	Dividend	L	T					
17.	Danaher Corp	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

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
U =Book Value
V =Other
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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. Alphabet Inc. CL A	A	Dividend	L	T					
19. Veralto Corp [Spin Off From Danaher Corp]		None			Sold	03/05/24	L	E	
20. JP Morgan Chase & Company	A	Dividend	K	T					
21. VISA Inc	B	Dividend	J	T					
22. Alphabet Inc CL C	A	Dividend	K	T	Sold (part)	10/03/24	K	E	
23. Home Depot Inc	A	Dividend	L	T	Sold (part)	03/14/24	K	E	
24. iShares Trust Russell 1000	A	Dividend	L	T					
25. HCA Healthcare Inc	B	Dividend	K	T					
26. SPDR S&P MidCap 400 ETF TR	C	Dividend	K	T					
27. Technology Sector SPDR Trust SHS	B	Dividend	M	T					
28. Brentwood Tennessee G.O. Bond	A	Interest			Sold	09/01/24	J	A	
29. Minn St Colleges & SR A Revenue Bond	A	Interest			Sold	10/01/24	J	A	
30. Shumac LLC 50% Int (Holds Lake Property in Merrimack County, NH)		None	O	W					
31. Pleasant Lake Cottages, LLC (Real Estate)		None	O	W					
32. R.P. Jobin, Personal Loan		None	J	T					
33. Thermo Fisher Scientific Inc	A	Dividend	K	T					
34. UnitedHealth Group	A	Dividend			Sold	03/05/24	K	D	

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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
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

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35. Microsoft Corp	A	Dividend	K	T					
36. SPDR S&P Midcap 600	A	Dividend			Sold	03/05/24	K	E	
37. Vanguard Midcap ETF	B	Dividend			Sold	03/05/24	K	D	
38. Ameriprise Fin Inc	A	Dividend	K	T					
39. Union Pacific Corp	A	Dividend			Sold	06/14/24	J	D	
40. Amazon Inc		None	K	T					
41. American Tower Corp	A	Dividend	K	T					
42. Adobe Inc		None			Sold	03/05/24	K	D	
43. New Hampshire St Bus Sr A RV	B	Interest			Sold	03/05/24	K	A	
44. Trane Technologies PLC	A	Dividend	K	T	Buy	10/03/24	K		
45. UBS Pace Money Market Investments Fund Class P [K]	A	Dividend	J	T					
46. Virtus College Access 529 Age-Based 9 A(1) [K]	A	Interest	J	T					
47. Virtus College Access 529 Age-Based 9 A(2) [K]	A	Interest	K	T					
48. iShares Short Term Natl Muni Bond ETF [K]	A	Dividend			Sold	03/19/24	J	A	
49. iShares Core 1-5 Yr USD Bond ETF [K]	A	Dividend			Sold	03/19/24	J	A	
50. SPDR Bloomberg High Yield Bond ETF [K]	A	Dividend	J	T					
51. Vanguard Total Intnl Bond ETF [K]	A	Dividend	J	T					

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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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52.	iShares Tips Bond ETF [K]	A	Dividend			Sold	11/25/24	J	A	
53.	iShares Trust iShares 1-5 Year Inv Grd Bond ETF [K]	A	Dividend			Sold	03/19/24	J	A	
54.	iShares Core S&P Small-Cap ETF [K]	A	Dividend	J	T					
55.	iShares Russell 1000 Growth ETF [K]	A	Dividend	J	T					
56.	iShares MSCI EAFE ETF [K]	A	Dividend	J	T					
57.	Vanguard Valve ETF [K]	A	Dividend	J	T					
58.	Vanguard Mid-Cap ETF [K]	A	Dividend	J	T					
59.	Vanguard FTSE Emerging Mkt ETF [K]	A	Dividend	J	T					
60.	Vanguard Tax Exempt Bond Index ETF [K]		None	J	T					
61.	Vanguard Total Bond Mkt ETF [K]	A	Dividend			Sold	03/19/24	J	A	
62.	Western Asset Corp Bond Fund [K]	A	Dividend			Sold	03/19/24	J	A	
63.	iShares iBoxx Invt Grade Corp Bond ETF [K]	A	Dividend	J	T	Buy	03/19/24	J		
64.	iShares Core U.S. Agg Bond Fund ETF [K]	A	Dividend	J	T	Buy	03/19/24	J		
65.	JP Morgan Inpl Mgd Bond ETF [K]	A	Dividend	J	T	Buy	03/19/24	J		
66.	Calamos Mkt Neutral Income Fund Class I [K]	A	Dividend	J	T	Buy	03/19/24	J		
67.	First Eagle Global Funds Class I [K]	A	Dividend	J	T	Buy	03/19/24	J		
68.	Apple Inc [C]	B	Dividend	M	T					

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69. Danaher Corp [C]	A	Dividend	K	T					
70. JP Morgan Chase & Company [C]	A	Dividend	K	T					
71. UnitedHealth Group [C]	A	Dividend	L	T					
72. Berkshire Hathaway Inc [C]		None	J	T					
73. Costco Wholesale Corp [C]	A	Dividend	K	T					
74. Dominion Energy [C]	A	Dividend			Sold	10/03/24	J	A	
75. PNC Financial Services Group [C]	A	Dividend	J	T					
76. PepsiCo Inc [C]	A	Dividend	J	T					
77. Verizon Communications Inc [C]	A	Dividend			Sold	10/03/24	J	A	
78. Ameriprise Fin Inc [C]	A	Dividend	K	T					
79. Broadcom Ltd [C]	A	Dividend	L	T					
80. Ecolab Inc [C]	A	Dividend			Sold	10/03/24	J	D	
81. Meta Platforms Inc [C]		None	K	T					
82. Vanguard Mid Cap FD [C]	B	Dividend			Sold	10/04/24	J	A	
83. Vanguard REIT ETF [C]	A	Dividend	K	T					
84. Digital Realty Trust Inc [C]		None			Sold	10/03/24	J	B	
85. KeyCorp New [C]	A	Dividend			Sold	10/03/24	J	B	

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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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86. Northrop Grumman Corp [C]	A	Dividend	J	T					
87. RTX Corp [C]	A	Dividend	J	T					
88. Home Depot Inc [C]	A	Dividend	K	T					
89. Union Pacific Corp [C]	A	Dividend	J	T					
90. SPDR S&P 600 Small Cap [C]	A	Dividend	L	T					
91. Invesco Dev Mkts [C]	A	Dividend	K	T					
92. Starbucks Corp [C]	A	Dividend	J	T					
93. Visa Inc [C]	A	Dividend	L	T					
94. Fortive Corp [C]	A	Dividend	J	T					
95. Conoco Phillips [C]	A	Dividend	J	T					
96. Amazon Inc [C]		None	J	T					
97. Caterpillar Inc [C]	A	Dividend	K	T					
98. Eaton Corp PLC [C]	A	Dividend	J	T					
99. Booking Holdings Inc [C]	A	Dividend	J	T					
100. American Tower Corp [C]	A	Dividend	J	T					
101. AT&T Inc [C]	A	Dividend			Sold	10/03/24	J	A	
102. McDonald's Corp [C]	A	Dividend			Sold	10/03/24	J	B	

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103. Netflix Inc [C]		None	J	T					
104. Proctor & Gamble Co [C]	A	Dividend	J	T					
105. Wal-Mart Inc [C]	A	Dividend	J	T					
106. Vanguard FTSE Dev Mkt [C]	B	Dividend	M	T					
107. iShares Core S&P Small Cap [C]	A	Dividend	K	T					
108. iShares Russell 1000 Growth [C]	A	Dividend	L	T					
109. iShares MSCI EAFE [C]	A	Dividend	L	T					
110. Vanguard Value ETF [C]	A	Dividend	L	T					
111. Vanguard Mid-Cap ETF [C]	A	Dividend	M	T					
112. Vanguard FTSE Emerging Mkts [C]	A	Dividend			Sold	03/19/24	J	A	
113. iShares Tips Bond [C]	A	Dividend			Sold	03/19/24	J	A	
114. iShares Short Term Natl Muni Bond [C]	A	Dividend			Sold	03/19/24	J	A	
115. SPDR Bloomberg Barclay High Yield Bond [C]	A	Dividend	J	T					
116. Vanguard Total Intl Bond [C]	A	Dividend			Sold	03/19/24	K	A	
117. Adobe Inc [C]		None	J	T					
118. ExxonMobil Corp [C]	A	Dividend	K	T					
119. Halliburton Co [C]	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

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
McAuliffe, Steven J.	05/15/2025

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)	
120. Walt Disney Co [C]	A	Dividend			Sold	10/03/24	J	A	
121. Alphabet Inc CL A [C]	A	Dividend	K	T					
122. iShares 1-5 Yr Invt Grade Corp Bond [C]	A	Dividend			Sold	03/19/24	K	A	
123. iShares Core 1-5 Yr USD Bond GTF [C]	A	Dividend			Sold	03/19/24	J	A	
124. Microsoft Corp [C]	A	Dividend	K	T					
125. Vontier Corp Common [C]		None			Sold	10/03/24	J	A	
126. Carrier Global Corp [C]	A	Dividend			Sold	10/03/24	J	B	
127. Otis Worldwide Corp [C]	A	Dividend			Sold	10/03/24	J	A	
128. Vanguard Tax Ex Bond Index ETF [C]	A	Dividend	K	T					
129. Warner Bros Discovery Inc [C]		None			Sold	10/03/24	J	A	
130. Veralto Corp [C]		None	J	T					
131. Vanguard Total Bond Mkt ETF [C]		None	J	T					
132. Western Asset Corp Bond Fund [C]		None			Sold	10/03/24	L	A	
133. iShares iBoxx Invt Grade Corp Bond ETF [C]	A	Dividend	K	T	Buy	03/19/24	K		
134. JP Morgan Inflation Mgd Bond ETF [C]	A	Dividend	K	T	Buy	11/25/24	K		
135. Calamos Market Neutral Income Fund [C]	A	Dividend	K	T	Buy	03/19/24	K		
136. First Eagle Global Funds Class I [C]	A	Dividend	J	T	Buy	03/19/24	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

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

PART VII. INVESTMENTS AND TRUSTS.

Trust #1 assets are listed in Part VII, identified by the designation "[C]."

Name of Person Reporting	Date of Report
McAuliffe, Steven J.	05/15/2025

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/ Steven J. McAuliffe

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
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