AO 10
Rev. 1/2018

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
MEANS, TERRY R.	UNITED STATES DISTRICT COURT	08/22/2023
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**
U.S. DISTRICT JUDGE - SENIOR STATUS	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
502 ELDON B. MAHON U.S. COURTHOUSE 501 WEST 10TH STREET FORT WORTH, TEXAS 76102		

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 pp. 9-13 of filing instructions.)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Sucessor Trustee	Testamentary trust
2.	President	The Gardens Homeowners Association
3.	Member	SMU Alumni Board
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions.)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

Name of Person Reporting	Date of Report
MEANS, TERRY R.	08/22/2023

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions.)*

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 AND TYPE
1.	2022	Means & Means, PC, d/b/a [redacted] attorney at law
2.		
3.		
4.		

IV. REIMBURSEMENTS -- *transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)

☑ 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 pp. 28-31 of filing instructions.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS -- *income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
1. Corsicana National Bank (account)	A	Interest	K	T					
2. First Fin. Bank (accounts)	A	Interest	N	T					
3. Frost National Bank (accounts)	A	Interest	K	T					
4. Goldman Sachs Bank (account)	B	Interest	N	T					
5. 1/2 interest in apt bldg (1985)($250,000) Corsicana, TX		None	N	R					
6. IRA #1 (H)									
7. --RBC U.S. Gov't. MM Fund	A	Dividend	J	T					
8. iShares J.P. Morgan USD Emerging Mkts. Bond ETF (EMB)	A	Dividend	J	T					
9. iShares iBoxx USD Investment Grade Corp Bond ETF (LQD)	A	Dividend	J	T					
10. Vanguard FTSE Developed Mkts. ETF (UEA)	A	Dividend	J	T					
11. Vanguard REIT Index Fund (VNQ)	A	Dividend	J	T					
12. Vanguard Total Stock Mkt. ETF (VTI)	A	Dividend	K	T					
13. Vanguard FTSE Emerging Mkts. ETF (VWO)	A	Dividend	J	T					
14. Principal Employer's 401(k) Plan (H)									
15. --Principal Small Cap	A	Dividend	J	T					
16. Community Nat'l Bank & Trust common stock	B	Dividend	K	T					
17. Testamentary trust #1 (H)									

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
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
18. ---Min'l interest, parcel 1, Lea Co., NM (1992 appr.)	B	Royalty	J	Q					
19. ---Min'l interest, parcel 2, Lea Co., NM (1992 appr.)		None	J	Q					
20. Northwestern Mutual "Whole Life"	B	Dividend	L	T					
21. Northwestern Mutual "Paid Up Life"	A	Dividend	K	T					
22. Northwestern Mutual "Adjustable CompLife"	B	Dividend	K	T					
23. Northwestern Mutual "65 Life" (EKM) (X)	A	Dividend	J	T					
24. Northwestern Mutual "65 Life" (MHM) (X)	A	Dividend	J	T					
25. Penn Mutual "Whole Life"	A	Dividend	K	T					
26. Mineral Interest, Anderson Co., TX: 2 parcels (H)									
27. ---Parcel 1		None	J	W					
28. ---Parcel 2		None	J	W					
29. Mineral Interest, Andrews Co., TX: 2 parcels (H)									
30. ---Parcel 1		None	J	W					
31. ---Parcel 2		None	J	W					
32. Mineral Interest, Crockett Co. TX: 17 parcels (H)									
33. ---Parcel 1		None	J	W					
34. ---Parcel 2		None	J	W					

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
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
35. ---Parcel 3		None	J	W					
36. ---Parcel 4		None	J	W					
37. ---Parcel 5		None	J	W					
38. ---Parcel 6		None	J	W					
39. ---Parcel 7		None	J	W					
40. ---Parcel 8		None	J	W					
41. ---Parcel 9		None	J	W					
42. ---Parcel 10		None	J	W					
43. ---Parcel 11		None	J	W					
44. ---Parcel 12		None	J	W					
45. ---Parcel 13		None	J	W					
46. ---Parcel 14		None	J	W					
47. ---Parcel 15		None	J	W					
48. ---Parcel 16		None	J	W					
49. ---Parcel 17		None	J	W					
50. Mineral Interest, Dawson Co., TX: 2 parcels (H)									
51. ---Parcel 1 ($4300)	B	Royalty	J	S					

1 Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
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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
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52. ---Parcel 2 ($3300)	A	Royalty	J	S					
53. Mineral Interest, Ector Co., TX: 3 parcels (H)									
54. ---Parcel 1		None	J	W					
55. ---Parcel 2		None	J	W					
56. ---Parcel 3		None	J	W					
57. ---Parcel 4 (Y)									Merged into parcel 3
58. Surf/Min, Freestone Co.,TX: M. Hunt Survey ($90,780)		None	L	S					
59. Mineral Interest, Freestone Co.: 2 parcels (H)									
60. ---Parcel 1		None	J	W					
61. ---Parcel 2	A	Royalty	J	W					
62. Mineral Interest, Gaines Co., TX		None	J	W					
63. Mineral Interest, Glasscock Co., TX: 4 parcels (H)									
64. ---Parcel 1 ($1310) (X)	A	Royalty	J	S					
65. ---Parcel 2 (X)	A	Royalty	J	W					
66. ---Parcel 3 (X)	A	Royalty	J	W					
67. ---Parcel 4 (X)	A	Royalty	J	W					
68. Mineral Interest, Gregg Co., TX: 27 parcels (H)									

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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69. ---Parcel 1		None	J	W					
70. ---Parcel 2		None	J	W					
71. ---Parcel 3		None	J	W					
72. ---Parcel 4		None	J	W					
73. ---Parcel 5		None	J	W					
74. ---Parcel 6		None	J	W					
75. ---Parcel 7		None	J	W					
76. ---Parcel 8		None	J	W					
77. ---Parcel 9		None	J	W					
78. ---Parcel 10		None	J	W					
79. ---Parcel 11		None	J	W					
80. ---Parcel 12		None	J	W					
81. ---Parcel 13		None	J	W					
82. ---Parcel 14		None	J	W					
83. ---Parcel 15		None	J	W					
84. ---Parcel 16		None	J	W					
85. ---Parcel 17		None	J	W					

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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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86. ---Parcel 18		None	J	W					
87. ---Parcel 19		None	J	W					
88. ---Parcel 20		None	J	W					
89. ---Parcel 21		None	J	W					
90. ---Parcel 22		None	J	W					
91. ---Parcel 23		None	J	W					
92. ---Parcel 24		None	J	W					
93. ---Parcel 25		None	J	W					
94. ---Parcel 26		None	J	W					
95. ---Parcel 27		None	J	W					
96. Mineral Interest, Harrison Co., TX: 6 parcels (H)									
97. ---Parcel 1		None	J	W					
98. ---Parcel 2	A	Royalty	J	W					
99. ---Parcel 3	A	Royalty	J	W					
100. ---Parcel 4		None	J	W					
101. ---Parcel 5		None	J	W					
102. ---Parcel 6		None	J	W					

1 Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
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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
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103. Mineral interest, Haskell Co., TX: 1 parcel		None	J	W					
104. Mineral interest, Howard Co., TX: 8 parcels (H)									
105. ---Parcel 1		None	J	W					
106. ---Parcel 2		None	J	W					
107. ---Parcel 3 ($2200)	A	Royalty	J	S					
108. ---Parcel 4 ($1210)	A	Royalty	J	S					
109. ---Parcel 5 ($3370)	B	Royalty	J	S					
110. ---Parcel 6 ($7270)	C	Royalty	J	S					
111. ---Parcel 7 ($7300)	C	Royalty	J	S					
112. ---Parcel 8 (X)	A	Royalty	J	W					
113. Mineral interest, King Co., TX: 2 parcels (H)									
114. --Parcel 1		None	J	W					
115. --Parcel 2		None	J	W					
116. Mineral interest, Knox Co., TX: 2 parcels (H)									
117. ---Parcel 1		None	J	W					
118. ---Parcel 2		None	J	W					
119. Mineral interest, Martin Co., TX: 3 parcels (H)									

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	
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120. ---Parcel 1		None	J	W					
121. ---Parcel 2 ($3300)	B	Royalty	J	S					
122. ---Parcel 3 ($4300)	B	Royalty	J	S					
123. Mineral interests, Midland Co., TX: 6 Parcels (H)									
124. --Parcel 1 ($10,970)	C	Royalty	J	S					
125. --Parcel 2 ($3240)	A	Royalty	J	S					
126. --Parcel 3 ($3770)	A	Royalty	J	S					
127. --Parcel 4 ($2820)	A	Royalty	J	S					
128. --Parcel 5 ($4050)	B	Royalty	J	S					
129. --Parcel 6 ($5760)	B	Royalty	J	S					
130. Mineral interest, Navarro Co., TX: 1 Parcel ($1640)	A	Royalty	J	S					
131. Mineral interest, Nolan Co., TX: 3 parcels (H)									
132. ---Parcel 1		None	J	W					
133. ---Parcel 2		None	J	W					
134. ---Parcel 3		None	J	W					
135. Mineral interest, Pecos Co., TX: 17 parcels (H)									
136. ---Parcel 1		None	J	W					

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
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
137. ---Parcel 2		None	J	W					
138. ---Parcel 3	A	Royalty	J	W					
139. ---Parcel 4	A	Royalty	J	W					
140. ---Parcel 5		None	J	W					
141. ---Parcel 6		None	J	W					
142. ---Parcel 7		None	J	W					
143. ---Parcel 8		None	J	W					
144. ---Parcel 9		None	J	W					
145. ---Parcel 10		None	J	W					
146. ---Parcel 11 ($1120)	A	Royalty	J	S					
147. ---Parcel 12		None	J	W					
148. ---Parcel 13		None	J	W					
149. ---Parcel 14		None	J	W					
150. ---Parcel 15		None	J	W					
151. ---Parcel 16 ($1870)	A	Royalty	J	S					
152. -- Parcel 17		None	J	W					
153. Mineral interest, Reagan Co., TX: 15 parcels (H)									

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
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
154. ---Parcel 1		None	J	W					
155. ---Parcel 2		None	J	W					
156. ---Parcel 3		None	J	W					
157. ---Parcel 4		None	J	W					
158. ---Parcel 5 ($2200)	A	Royalty	J	S					
159. ---Parcel 6		None	J	W					
160. ---Parcel 7	A	Royalty	J	W					
161. ---Parcel 8 ($4970)	A	Royalty	J	S					
162. ---Parcel 9 ($13,510)	B	Royalty	J	S					
163. ---Parcel 10 ($1250)	A	Royalty	J	S					
164. ---Parcel 11 ($1350)	A	Royalty	J	S					
165. ---Parcel 12 ($1140)	A	Royalty	J	S					
166. ---Parcel 13 ($1870)	A	Royalty	J	S					
167. ---Parcel 14 ($1200)	A	Royalty	J	S					
168. ---Parcel 15 ($1910)	A	Royalty	J	S					
169. Mineral interest, Reeves Co., TX: Parcel 1 ($28,500)	D	Royalty	K	S					
170. Mineral interest, Rusk Co., TX: 15 parcels (H)									

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
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Name of Person Reporting	Date of Report
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
171. ---Parcel 1		None	J	W					
172. ---Parcel 2		None	J	W					
173. ---Parcel 3		None	J	W					
174. ---Parcel 4		None	J	W					
175. ---Parcel 5		None	J	W					
176. ---Parcel 6		None	J	W					
177. ---Parcel 7		None	J	W					
178. ---Parcel 8		None	J	W					
179. ---Parcel 9		None	J	W					
180. ---Parcel 10		None	J	W					
181. ---Parcel 11		None	J	W					
182. ---Parcel 12		None	J	W					
183. ---Parcel 13		None	J	W					
184. ---Parcel 14		None	J	W					
185. ---Parcel 15		None	J	W					
186. Mineral interest, Stonewall Co. TX: 3 parcels (H)									
187. ---Parcel 1		None	J	W					

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
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
188. ---Parcel 2		None	J	W					
189. ---Parcel 3		None	J	W					
190. Mineral interest, Upton Co., TX: 20 parcels (H)									
191. ---Parcel 1		None	J	W					
192. ---Parcel 2		None	J	W					
193. ---Parcel 3		None	J	W					
194. ---Parcel 4		None	J	W					
195. ---Parcel 5		None	J	W					
196. ---Parcel 6		None	J	W					
197. ---Parcel 7		None	J	W					
198. ---Parcel 8		None	J	W					
199. ---Parcel 9		None	J	W					
200. ---Parcel 10		None	J	W					
201. ---Parcel 11		None	J	W					
202. ---Parcel 12		None	J	W					
203. ---Parcel 13		None	J	W					
204. ---Parcel 14		None	J	W					

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
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
205. ---Parcel 15 ($5860)	C	Royalty	J	S					
206. ---Parcel 16 ($1620)	A	Royalty	J	S					
207. ---Parcel 17 ($1090)	A	Royalty	J	S					
208. ---Parcel 18 ($2640)	B	Royalty	J	S					
209. ---Parcel 19 ($1150)	A	Royalty	J	S					
210. ---Parcel 20 ($3110)	B	Royalty	J	S					
211. Mineral interest, Ward Co, TX: 4 parcels (H)									
212. ---Parcel 1		None	J	W					
213. ---Parcel 2		None	J	W					
214. ---Parcel 3		None	J	W					
215. ---Parcel 4		None	J	W					
216. Mineral interest, Wood Co., TX 9 parcels (H)									
217. ---Parcel 1 ($3550)	A	Royalty	J	S					
218. ---Parcel 2 ($10520)	D	Royalty	J	S					
219. ---Parcel 3 ($5840)	C	Royalty	J	S					
220. ---Parcel 4 ($2340)	A	Royalty	J	S					
221. ---Parcel 5 ($7020)	C	Royalty	J	S					

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
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
222. ---Parcel 6		None	J	W					
223. ---Parcel 7		None	J	W					
224. ---Parcel 8		None	J	W					
225. ---Parcel 9		None	J	W					
226. Mineral interest, Yoakum Co., TX: 1 parcel ($63,330)	E	Royalty	L	S					
227. Mineral interest, Zapata Co., TX: 9 parcels (H)									
228. ---Parcel 1 ($3350)	A	Royalty	J	S					
229. ---Parcel 2 ($1800)	A	Royalty	J	W					
230. ---Parcel 3		None	J	W					
231. ---Parcel 4		None	J	W					
232. ---Parcel 5 ($11060)	C	Royalty	J	S					
233. ---Parcel 6 ($2470)	A	Royalty	J	S					
234. ---Parcel 7	A	Royalty	J	W					
235. ---Parcel 8		None	J	W					
236. ---Parcel 9		None	J	W					
237. Clearfork Royalty 3, LP, Tarrant Co., TX	D	Distribution	K	U					
238. Clearfork Royalty 3, LP, Tarrant Co., TX	C	Distribution	J	U					

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

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VII. INVESTMENTS and TRUSTS -- *income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
239. BelleTorus Corp. Common Stock (closely held)		None	L	U					
240. Wealthfront Brokerage LLC (Acct. #1) (D5C) (H)									
241. ---iShares Core MSCI Emerging Markets ETF (IEMG)	A	Dividend			Sold (part)	02/23/22	J	A	
242.					Buy (add'l)	04/18/22	J		
243.					Sold (part)	07/18/22	J	A	
244.					Buy (add'l)	09/20/22	J		
245.					Sold	10/24/22	J	A	
246. ---IShares iBoxx USD Investment Grade Corporate Bond ETF (LQD)	A	Dividend	J	T	Buy (add'l)	01/03/22	J		
247.					Sold (part)	02/03/22	J	A	
248.					Sold	02/04/22	J	A	
249.					Buy	03/07/22	J		
250.					Sold	04/29/22	J	A	
251.					Buy	06/10/22	J		
252.					Sold	09/01/22	J	A	
253.					Buy	10/03/22	J		
254. --Schwab US Broad Market ETF (SCHB)	A	Dividend	J	T	Sold (part)	01/20/22	J	A	
255.					Sold (part)	01/26/22	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	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
256.					Buy (add'l)	02/28/22	K		
257.					Buy (add'l)	03/17/22	J		
258.					Sold (part)	04/18/22	J	A	
259.					Sold (part)	04/22/22	K	A	
260.					Sold (part)	04/27/22	J	A	
261.					Buy (add'l)	06/13/22	K		
262.					Buy (add'l)	06/17/22	J		
263.					Sold (part)	09/23/22	K	A	
264.					Sold (part)	09/28/22	J	A	
265.					Buy (add'l)	11/03/22	J		
266. ---Schwab Dow Jones US Dividend 100 Index (SCHD)	A	Dividend	J	T					
267. ---Schwab International Equity ETF (SCHF)	A	Dividend	J	T	Sold (part)	06/17/22	J	A	
268.					Buy (add'l)	09/01/22	J		
269.					Sold (part)	10/31/22	J	A	
270. ---Schwab US TIPS (SCHP)	A	Dividend			Buy (add'l)	03/21/22	J		
271.					Buy (add'l)	04/01/22	J		
272.					Sold (part)	05/02/22	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		

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VII. INVESTMENTS and TRUSTS -- *income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
273.					Buy (add'l)	08/11/22	J		
274.					Sold	10/24/22	J	A	
275. ---State Street Barclays Capital Muni (TFI)	A	Dividend	K	T	Buy (add'l)	01/19/22	J		
276.					Buy (add'l)	02/03/22	J		
277.					Buy (add'l)	02/11/22	K		
278.					Buy (add'l)	02/17/22	J		
279.					Buy (add'l)	03/25/22	J		
280.					Buy (add'l)	04/19/22	J		
281.					Sold	04/25/22	K	B	
282.					Buy	07/18/22	J		
283.					Buy (add'l)	07/19/22	J		
284.					Buy (add'l)	08/17/22	J		
285.					Sold	08/19/22	J	A	
286.					Buy	11/07/22	K		
287. ---Vanguard Intermediate Term Corporate Bond ETC (VCIT)	A	Dividend			Sold	01/03/22	J	A	
288.					Buy	02/03/22	J		
289.					Buy (add'l)	02/04/22	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
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
290.					Sold	03/07/22	J		
291.					Buy	04/29/22	J		
292.					Sold	06/10/22	J	A	
293.					Buy	09/01/22	J		
294.					Sold	10/03/22	J	A	
295. ---Vanguard FTSE Developed Mkts. ETF (VEA)	A	Dividend	J	T	Buy (add'l)	06/17/22	J		
296.					Sold (part)	09/01/22	J	A	
297.					Buy (add'l)	10/31/22	J		
298. ---Vanguard Dividend Appreciation (VIG)	A	Dividend	J	T					
299. ---Vanguard Tax-Exempt Bond ETF (VTEB)	A	Dividend	J	T	Sold (part)	02/03/22	J	A	
300.					Sold (part)	02/11/22	K	B	
301.					Sold (part)	03/25/22	J	A	
302.					Buy (add'l)	04/25/22	K		
303.					Buy (add'l)	05/17/22	J		
304.					Sold (part)	07/18/22	J	A	
305.					Buy (add'l)	08/19/22	J		
306.					Buy (add'l)	09/19/22	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
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
307.					Sold (part)	11/07/22	K	B	
308. ---Vanguard Total Stock Market ETF (VTI)	A	Dividend	K	T	Buy (add'l)	01/19/22	J		
309.					Buy (add'l)	01/20/22	J		
310.					Buy (add'l)	01/26/22	J		
311.					Buy (add'l)	02/17/22	J		
312.					Sold (part)	02/28/22	K	A	
313.					Buy (add'l)	04/22/22	K		
314.					Buy (add'l)	04/27/22	J		
315.					Buy (add'l)	05/17/22	J		
316.					Sold (part)	06/13/22	K	B	
317.					Buy (add'l)	09/19/22	J		
318.					Buy (add'l)	09/23/22	K		
319.					Buy (add'l)	09/28/22	J		
320.					Sold (part)	11/03/22	J	A	
321. ---Vanguard Short-Term Inflation-Protected Securities ETF (VTIP)	A	Dividend	K	T	Sold (part)	03/21/22	J	A	
322.					Sold (part)	04/01/22	J	A	
323.					Buy (add'l)	05/02/22	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
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
324.					Sold (part)	08/11/22	J	A	
325.					Buy (add'l)	10/24/22	J		
326. ---Vanguard FTSE Emerging Mkts ETF (VWO)	A	Dividend	J	T	Buy (add'l)	02/23/22	J		
327.					Sold (part)	04/18/22	J	A	
328.					Buy (add'l)	07/18/22	J		
329.					Sold (part)	09/20/22	J	A	
330. ---RBC US Government Money Market Fund (TIMXX)	A	Dividend			Buy	01/19/22	J		
331.					Sold	01/21/22	J	A	
332.					Buy	02/17/22	J		
333.					Sold	02/22/22	J	A	
334.					Buy	03/17/22	J		
335.					Sold (part)	03/21/22	J	A	
336.					Sold	03/29/22	J	A	
337.					Buy	04/19/22	J		
338.					Sold	04/21/22	J	A	
339.					Buy	05/17/22	J		
340.					Sold	05/19/22	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
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
341.					Buy	06/17/22	J		
342.					Sold	06/22/22	J	A	
343.					Buy	07/19/22	J		
344.					Sold	07/21/22	J	A	
345.					Buy	08/17/22	J		
346.					Sold	08/19/22	J	A	
347.					Buy	09/19/22	J		
348.					Sold	09/21/22	J	A	
349. Wealthfront Brokerage LLC (Acct. #2) (H)									
350. ---iShares Core MSCI Emerging Mkts. ETF (IEMG)	A	Dividend			Sold	01/28/22	J	A	
351.					Buy	04/18/22	J		
352.					Sold	06/21/22	J	A	
353.					Buy	09/19/22	J		
354.					Sold	10/21/22	J	A	
355. ---Schwab U.S. Broad Market (SCHB)	A	Dividend			Sold (part)	01/26/22	J	A	
356.					Sold (part)	02/22/22	K	A	
357.					Sold	04/27/22	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
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
358.					Buy	06/17/22	J		
359.					Sold	09/28/22	J	A	
360. ---Schwab Dow Jones U.S. Div. 100 Index (SCHD)	A	Dividend	J	T	Sold (part)	02/22/22	J	A	
361. ---Schwab International Equity ETF (SCHF)	A	Dividend	J	T	Buy (add'l)	02/01/22	J		
362.					Sold (part)	02/22/22	J	A	
363.					Sold	03/07/22	J	A	
364.					Buy	05/06/22	J		
365.					Buy (add'l)	06/10/22	J		
366.					Buy (add'l)	08/22/22	J		
367.					Sold (part)	10/31/22	J	A	
368. ---State Street Barclays Capital Muni (TFI)	A	Dividend			Sold	02/22/22	J	A	
369. ---RBC US Government Money Mkt. Fund (TIMXX)	A	Dividend			Buy	02/24/22	K		
370.					Sold	02/24/22	K	A	
371. ---Vanguard FTSE Developed Mkts. ETF (VEA)	A	Dividend	J	T	Buy	02/01/22	J		
372.					Buy (add'l)	03/07/22	J		
373.					Sold (part)	05/06/22	J	A	
374.					Buy (add'l)	06/10/22	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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Name of Person Reporting	Date of Report
MEANS, TERRY R.	08/22/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions)*

☐ NONE *(No reportable income, assets, or transactions.)*

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)	(5) Identity of buyer/seller (if private transaction)
375.					Sold (part)	08/22/22	J	A	
376.					Buy (add'l)	10/31/22	J		
377. ---Vanguard Dividend Appreciation (VIG)	A	Dividend			Sold	02/22/22	J	A	
378. ---Vanguard Total Stock Mkt. ETF (VTI)	A	Dividend	J	T	Buy (add'l)	01/26/22	J		
379.					Sold	02/22/22	J	A	
380.					Buy	04/27/22	J		
381.					Sold	06/17/22	J	A	
382.					Sold (part)	09/28/22	J		
383. ---Vanguard FTSE Emerging Mkts. ETF (VWO)	A	Dividend	J	T	Buy	01/28/22	J		
384.					Sold (part)	02/22/22	J	A	
385.					Sold	04/18/22	J	A	
386.					Buy	06/21/22	J		
387.					Sold	09/19/22	J	A	
388.					Buy	10/21/22	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
MEANS, TERRY R.	08/22/2023

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

Lines 27-236 of Part VII: Many lines show a "W" in the value method column. This is because, while there are appraisal-authority assessments of less than $1000 for most of these interests, filer's would take no less than $1000 for any of them.

Name of Person Reporting	Date of Report
MEANS, TERRY R.	08/22/2023

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/ TERRY R. MEANS**

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
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Washington, D.C. 20544