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
Mehta, Amit P.	US District Court for the District of Columbia	08/13/2024
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**
Active US District Court Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final	01/01/2023 **to** 12/31/2023
	5b. ☐ Amended Report	

7. Chambers or Office Address

US District Court for the District of Columbia
333 Constitution Avenue, NW
Washington, DC 20001

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.	Vice President	Edward Bennett Williams Inn of Court
2.	Board Member	Historical Society of the DC Circuit
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements.)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE
1.	2023	Self-employed attorney
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.	ABA - White Collar Section	March 2-3, 2023	Miami, FL	Conference	Airfare, hotel and taxis
2.	ABA/Federal Judicial Center - Antitrust Institute for Judges	May 8-9, 2023	Chicago, IL	Conference	Airfare, hotel, taxis and meals
3.	ABA - Antitrust Section	June 10-13,2023	Copenhagen, Denmark	Conference	Airfare, hotel, taxis and meals
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.	ACS	Student Loan	J
2.	Greensky	Financing of new windows installed by Andersen Windows	J
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Mehta, Amit P.	08/13/2024

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. Citibank Accounts	A	Interest	J	T					
2. DC College Savings Plan (H)									
3. - Intermediate-Term Bond Portfolio		None	K	T	Buy (add'l)	05/30/23	J		
4.					Sold (part)	07/10/23	K		
5. - US Large Cap Equity Portfolio		None	N	T	Buy (add'l)	05/30/23	J		
6.					Buy (add'l)	07/10/23	M		
7.					Buy (add'l)	11/27/23	K		
8. - DC College Savings 2025 Portfolio		None	M	T	Buy (add'l)	05/30/23	J		
9. - DC College Savings 2028 Portfolio		None			Sold	07/10/23	M		
10. IRA #1 (H)									
11. - American Funds Developing World Growth & Income	A	Dividend			Sold	06/23/23	L		
12. - American Funds Emerging Mkts Bond Fd	A	Dividend			Sold	07/20/23	K		
13. - American Funds Small-Cap World		None			Sold	07/20/23	K	B	
14. - DFA International Small-Cap Value Portfolio Institutional	B	Dividend	L	T					
15. - DFA U.S. Micro Capital Portfolio Institutional	A	Dividend			Sold	07/20/23	K	D	
16. - Harbor Small-Cap Value Fund Institutional		None			Sold	07/20/23	L	D	
17. - JPMorgan Emerging Mkts Equity Fund		None			Sold	06/23/23	K		

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
Mehta, Amit P.	08/13/2024

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. - JPMorgan Income Builder Fund	B	Dividend			Sold	06/23/23	M		
19. - Matthews Asia Esg Fund Institutional		None			Sold	07/20/23	K	C	
20. - PIMCO Income Fund	C	Dividend			Sold	07/20/23	L		
21. - Templeton Global Total Return Fund	A	Dividend			Sold	06/23/23	K		
22. - Wasatch Micro Capital Fund		None			Sold	07/20/23	K		
23. - American Funds Capital Income Builder	B	Dividend			Sold	07/20/23	L	B	
24. - Bailie Gifford Long Term Global Growth Institutional		None	L	T					
25. - Fidelity Treasury Money Market at Clearstead (IRA Acct)	A	Int./Div.	K	T					
26. - Cliffwater Corporate Lending	D	Dividend	L	T	Buy	06/23/23	L		
27. - Driehaus Emerging Markets Growth	B	Dividend	L	T	Buy	06/26/23	L		
28. - Fidelity 500 Index	B	Dividend	M	T	Buy	07/20/23	M		
29. - JPMorgan Equity Premium	C	Dividend	L	T	Buy	06/23/23	L		
30. - Mainstay Cbre Global Infrastructure	A	Dividend	L	T	Buy	07/20/23	L		
31. - Vanguard Equity-Income Adm	D	Dividend	L	T	Buy	07/20/23	L		
32. IRA #2 (H)									
33. - American Funds Capital Income Builder	D	Dividend			Sold	07/20/23	O	D	
34. - American Funds EuroPacific Growth	A	Dividend			Sold	07/20/23	M		

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35. - Harbor Small-Cap Value Fund		None			Sold	07/20/23	M		
36. - American Funds Developing World Growth & Inc Fund	B	Dividend			Sold	06/23/23	M		
37. - JPMorgan Mid-Cap Gwoth Fund		None			Sold	07/20/23	L		
38. - John Hancock Funds Disciplined Value Mid-Cap Fund		None			Sold	07/20/23	M	D	
39. - Wasatch Small-Cap Growth Fund Instl		None			Sold	07/20/23	L		
40. - Cliffwater Corporate Lending Fund I	D	Dividend	L	T					
41. - Fidelity Treasury Money Market at Clearstead	B	Int./Div.	K	T					
42. - Baille Gifford Long Term Global Growth Institutional		None	L	T	Buy	07/20/23	L		
43. - Driehaus International Small Cap Growth Fund	B	Dividend	M	T	Buy	07/20/23	M		
44. - Fidelity 500 Index	C	Dividend	N	T	Buy	07/20/23	N		
45. - Fidelity Mid-Cap Index Fund Institutional Premium	B	Dividend	M	T	Buy	07/20/23	M		
46. - Hartford Global Impact	B	Dividend	M	T	Buy	07/20/23	M		
47. - JPMorgan Equity Premium	C	Dividend	M	T	Buy	06/23/23	L		
48.					Buy (add'l)	10/06/23	K		
49. - Mondrian Global Equity Value	B	Dividend	L	T	Buy	07/20/23	L		
50. -Ninety One Global Franchise Fund	A	Dividend	M	T	Buy	07/20/23	M		
51. - Prudential High-Yield Fund	B	Dividend	L	T	Buy	06/23/23	L		

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52. - Vanguard Equity-Income Fund	D	Dividend	M	T	Buy	07/20/23	M		
53. Clearstead at Fidelity - [redacted] Account (H)									
54. - Fidelity Treasury Money Market at Clearstead	B	Int./Div.	J	T					
55. - DFA Emerging Markets Small-Cap Portfolio Institutional	A	Dividend	K	T					
56. - DFA International Small Company Portfolio Institutional	A	Dividend			Sold	07/20/23	K	B	
57. - DFA International Small-Cap Value Portfolio Institutional	B	Dividend	K	T					
58. - DFA International Sustainability Core 1 Portfolio	A	Dividend			Sold	07/20/23	K	C	
59. - Fidelity Small-Cap Value Index Fund	A	Dividend	K	T					
60. - Cliffwater Corporate Lending Fund I	C	Dividend			Sold	08/14/23	K	A	
61. - Boston Trust Walden Small-Cap Fund	A	Dividend	L	T					
62. - Fidelity 500 Index Fund	B	Dividend	M	T	Buy (add'l)	06/23/23	K		
63.					Buy (add'l)	08/17/23	K		
64. - Mondrian Global Equity Value Fund	B	Dividend	L						
65. - Vanguard Equity Income Admiral Fund	C	Dividend	K		Buy (add'l)	06/23/23	K		
66.					Buy (add'l)	08/17/23	K		
67. - JPMorgan Exchanged Traded Fund	B	Dividend			Sold	06/23/23	L	A	
68. - PGIM Total Return Bond	B	Dividend	L	T	Buy	07/20/23	L		

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69.					Sold (part)	10/02/23	J		
70. Clearstead at Fidelity - SEP IRA (H)									
71. - Fidelity Treasury Money Market Fund	A	Dividend	J	T	Buy	10/12/23	J		
72.					Sold (part)	10/16/23	J		
73. - Mondrian Global Equity Value Fund	A	Dividend	J		Buy	10/13/23	J		

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

NAME CHANGE:

The asset name changed from "FDIC Bank Deposit Sweep at Clearstead" to "Fidelity Treasury Money Market Fund" for asset numbers 25, 41 and 54. The sweep accounts were closed and the money market accounts opened during the latter part of 2022.

Name of Person Reporting	Date of Report
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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/ Amit P. Mehta

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