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 |
|---|---|---|
| Mehta, Amit P. | US District Court for the District of Columbia | 06/11/2025 |
| **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** |
| Active US District Court Judge | ☐ Nomination Date<br>☐ Initial ☑ Annual ☐ Final | 01/01/2024 **to** 12/31/2024 |
| | **5b.** ☐ Amended Report | |
| **7. Chambers or Office Address** | | |
| US District Court for the District of Columbia<br>333 Constitution Avenue, NW<br>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. | 2024 | 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. | Judicial Security Committee | January 2-5, 2024 | Savannah, GA | Comittee meeting | Airfare, hotel and meals |
| 2. | ABA - Antitrust Section | September 27-28, 2024 | Philadelphia, PA | Conference | Train |
| 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. | ACS | Student Loan | J |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

| Name of Person Reporting | Date of Report |
|---|---|
| **Mehta, Amit P.** | 06/11/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 1. Citibank Cash Accounts | A | Interest | M | T | | | | | |
| 2. DC College Savings Plan (H) | | | | | | | | | |
| 3. - Intermediate-Term Bond Portfolio | | None | | | Sold | 03/27/24 | K | | |
| 4. - US Large Cap Equity Portfolio | | None | M | T | Buy (add'l) | 03/27/24 | L | | |
| 5. | | | | | Sold (part) | 03/27/24 | M | | |
| 6. | | | | | Sold (part) | 05/13/24 | M | | |
| 7. | | | | | Buy (add'l) | 05/13/24 | J | | |
| 8. - DC College Savings 2025 Portfolio | | None | M | T | Buy (add'l) | 03/27/24 | M | | |
| 9. | | | | | Sold (part) | 03/27/24 | L | | |
| 10. | | | | | Buy (add'l) | 05/13/24 | J | | |
| 11. - Non-U.S. Total Stock Market Index Portfolio | | None | K | T | Buy | 03/27/24 | L | | |
| 12. - U.S. Small Cap Equity Portfolio | | None | M | T | Buy | 03/27/24 | K | | |
| 13. | | | | | Buy (add'l) | 05/13/24 | L | | |
| 14. - U.S. Intermediate-Term Bond Index Portfolio | | None | L | T | Buy | 05/13/24 | L | | |
| 15. IRA #1 (H) | | | | | | | | | |
| 16. - DFA International Small-Cap Value Portfolio Institutional | B | Dividend | | | Sold | 10/03/24 | L | E | |
| 17. - Bailie Gifford Long Term Global Growth Institutional | | None | L | 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 |
|---|---|
| **Mehta, Amit P.** | 06/11/2025 |

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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. - Fidelity Treasury Money Market Fund (IRA Acct) | A | Int./Div. | K | T | | | | | |
| 19. - Cliffwater Corporate Lending | D | Dividend | L | T | | | | | |
| 20. - Driehaus Emerging Markets Growth | | None | | | Sold | 03/22/24 | L | D | |
| 21. - Fidelity 500 Index | C | Dividend | M | T | | | | | |
| 22. - JPMorgan Equity Premium | B | Dividend | | | Sold | 03/22/24 | L | C | |
| 23. - NYLI Cbre Global Infrastructure (formerly Mainstay) | B | Dividend | L | T | | | | | |
| 24. - Vanguard Equity-Income Adm | D | Dividend | M | T | | | | | |
| 25. - Goldman Sachs Small Cap Value Insights Fund I | D | Dividend | K | T | Buy | 03/22/24 | K | | |
| 26. - Loomis Sayles Small Cap Growth Instl | C | Dividend | L | T | Buy | 03/22/24 | L | | |
| 27. - Rational Special Situations Income Instl | C | Dividend | L | T | Buy | 03/22/24 | L | | |
| 28. - Lord Abbett Short Duration Income Fund Class I | A | Dividend | L | T | Buy | 10/03/24 | L | | |
| 29. IRA #2 (H) | | | | | | | | | |
| 30. - Cliffwater Corporate Lending Fund I | D | Dividend | L | T | | | | | |
| 31. - Fidelity Treasury Money Market Fund | A | Int./Div. | K | T | | | | | |
| 32. - Baille Gifford Long Term Global Growth Institutional | | None | M | T | | | | | |
| 33. - Driehaus International Small Cap Growth Fund | | None | | | Sold | 10/03/24 | M | D | |
| 34. - Fidelity 500 Index | C | Dividend | N | T | Sold (part) | 03/22/24 | M | E | |

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|---|---|---|---|---|---|---|---|---|---|
| 35. - Fidelity Mid-Cap Index Fund Institutional Premium | B | Dividend | L | T | Sold (part) | 10/03/24 | K | C | |
| 36. - Hartford Global Impact | B | Dividend | M | T | | | | | |
| 37. - JPMorgan Equity Premium | B | Dividend | | | Sold | 03/22/24 | M | D | |
| 38. - Mondrian Global Equity Value | C | Dividend | L | T | | | | | |
| 39. - American Beacon Ninety One Global Franchise Fund | A | Dividend | M | T | | | | | |
| 40. - Prudential High-Yield Fund | C | Dividend | | | Sold | 10/03/24 | L | C | |
| 41. - Vanguard Equity-Income Fund | D | Dividend | M | T | | | | | |
| 42. - Fidelity Intermediate Treasury Bond Index Fund | C | Dividend | M | T | Buy | 03/22/24 | M | | |
| 43. - Goldman Sachs Small Cap Value Insights Fund I | C | Dividend | K | T | Buy | 03/22/24 | K | | |
| 44. - Lord Abbett Short Duration Income Fund Class I | B | Dividend | M | T | Buy | 10/03/24 | M | | |
| 45. - PFIM Total Return Bond - class R6 | D | Dividend | M | T | Buy | 03/22/24 | M | | |
| 46. | | | | | Buy (add'l) | 10/03/24 | M | | |
| 47. Clearstead at Fidelity (H) | | | | | | | | | |
| 48. - Fidelity Treasury Money Market Fund | B | Int./Div. | M | T | | | | | |
| 49. - DFA Emerging Markets Small-Cap Portfolio Institutional | | None | | | Sold | 03/22/24 | K | C | |
| 50. - DFA International Small-Cap Value Portfolio Institutional | B | Dividend | K | T | Sold (part) | 04/16/24 | J | B | |
| 51. - Fidelity Small-Cap Value Index Fund | A | Dividend | K | T | | | | | |

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|---|---|---|---|---|---|---|---|---|---|
| 52. - Boston Trust Walden Small-Cap Fund | C | Dividend | K | T | Sold (part) | 04/16/24 | K | A | |
| 53. - Fidelity 500 Index Fund | B | Dividend | M | T | Sold (part) | 04/16/24 | J | B | |
| 54. - Mondrian Global Equity Value Fund | C | Dividend | L | T | | | | | |
| 55. - Vanguard Equity Income Admiral Fund | D | Dividend | M | T | Sold (part) | 01/16/24 | J | | |
| 56. - PGIM Total Return Bond | A | Dividend | | | Sold | 01/16/24 | L | A | |
| 57. - Fidelity Mid-Cap Index Fund Institutional Premium | A | Dividend | J | T | Buy | 03/22/24 | J | | |
| 58. Clearstead at Fidelity - SEP IRA (H) | | | | | | | | | |
| 59. - Fidelity Treasury Money Market Fund | A | Dividend | J | T | | | | | |
| 60. - Mondrian Global Equity Value Fund | A | Dividend | J | T | | | | | |
| 61. 401(K) Profit Sharing Plan (H) | | | | | | | | | |
| 62. - American Funds EuroPacific Gr R6 | A | Dividend | J | T | Buy (add'l) | 04/30/24 | J | | |
| 63. | | | | | Sold (part) | 10/25/24 | J | | |
| 64. - American Funds New Economy R6 | A | Dividend | J | T | Buy (add'l) | 04/30/24 | J | | |
| 65. | | | | | Sold (part) | 10/25/24 | K | | |
| 66. - American Funds New Perspective R6 | A | Dividend | J | T | Buy (add'l) | 04/30/24 | J | | |
| 67. | | | | | Sold (part) | 10/25/24 | J | | |
| 68. - American Funds New World R6 | A | Dividend | J | T | Buy (add'l) | 04/30/24 | J | | |

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|---|---|---|---|---|---|---|---|---|---|
| 69. | | | | | Sold (part) | 10/25/24 | K | | |
| 70. - American Funds Smallcap World R6 | A | Dividend | J | T | Buy (add'l) | 04/30/24 | J | | |
| 71. | | | | | Sold (part) | 10/25/24 | K | | |
| 72. - American Funds Washington Mutual R6 | B | Dividend | J | T | Buy (add'l) | 04/30/24 | J | | |
| 73. | | | | | Sold (part) | 10/25/24 | K | | |
| 74. - American Funds Bond Fund of America R6 | B | Dividend | M | T | Buy | 10/25/24 | M | | |

| | | | | | |
|---|---|---|---|---|---|
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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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| **Mehta, Amit P.** | 06/11/2025 |

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

NAME CHANGE:

The asset name changed from "Ninety One Global Franchise Fund I" to "American Beacon Ninety One Global Franchise R5" for asset number 38.

ASSET REMOVED:

The Afiniti, LTD asset added to the 2023 amended FDR has been omitted from the 2024 report due to having a zero value after the company filed for bankruptcy in 2024.

| Name of Person Reporting | Date of Report |
|---|---|
| **Mehta, Amit P.** | 06/11/2025 |

## 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/ 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