AO 10
Rev. 1/2013

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

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
Michelson, Laurie J.	United States District Court, Eastern District of Michigan	11/07/2024
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
District Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
231 West Lafayette Blvd. Room 737 Detroit, MI 48226		

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.	Custodian for the Beneficiary (while a [redacted]	Trust #1
2.	Trustee	Trust # 2
3.	Trustee	Trust # 3
4.	Personal Representative	Estate #1
5.		

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

☐ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.	2011	Butzel Long Pension Trust. Distributions of $1,431 per month commencing at the age of 65.
2.		
3.		

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.		
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.			

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Michelson, Laurie J.	11/07/2024

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. 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)	D. (5) Identity of buyer/seller (if private transaction)
1. Bank of America (cash account)	A	Interest	K	T					
2. Bank of America -- IRA (cash)	A	Interest	J	T					
3. Brokerage Account (Heading)									
4. - DJIA LIRN ISSUER TD Bank 105%	A	Dividend	K	T					
5. - Bank of America NA RASP	A	Dividend	L	T					
6. - DJIA LIRN ISSUER CIBC 124.81%	C	Dividend	K	T					
7. - Alps Oshares US Sm OUSM	A	Dividend	K	T	Buy	11/10/23	K		
8. - American Fundamental Investors Mutual Fund	C	Dividend	N	T					
9. - Blackrock Innovation and Growth TR	A	Dividend	J	T					
10. - American Washington Mutual Investors Fund	C	Dividend	N	T					
11. - First Trust Large Cap Value Mutual Fund	B	Dividend	L	T					
12. - First Trust Large Cap Growth Mutual Fund	B	Dividend	M	T					
13. - First Trust Mid Cap Core Mutual Fund	A	Dividend	L	T					
14. - DJIA LIRN ISSUER BARC PART 115%	A	Dividend	L	T					
15. - DJIA LIRN ISSUER TD BANK PART 105%	A	Dividend	K	T					
16. - Mainstay CBRE Global Infrastructure	B	Dividend	J	T					
17. - American Centry ETF TR AVUV	A	Dividend	J	T	Buy	02/17/23	J		

1. Income Gain Codes: (See Columns B1 and D4) A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Michelson, Laurie J.	11/07/2024

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. 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)	D. (5) Identity of buyer/seller (if private transaction)
18. - BLACKROCK SCIENCE AND TECH TR 11	B	Dividend	K	T					
19. - ISHARES EDGE MSCI USA MOMETUM FACTOR ETF	A	Dividend	J	T					
20. - Mainstay Mackay Short	A	Dividend			Sold	11/10/23	L	A	
21. - Mainstay Mackay High	C	Dividend	L	T					
22. - IQ Mackay Muni Intermediate ETF SHS	D	Dividend	M	T					
23. - First Tr Managed Municipal Fixed Inc	C	Dividend	L	T					
24. - Blackrock Short Maturity	B	Dividend			Sold	02/17/23	M	A	
25. - Mainstay Mackay Dfndtrm Mun Oppor FD	C	Dividend	M	T					
26. - First TR DVD 30 Stoxx FDD	A	Dividend	J	T	Buy	02/17/23	J		
27. - RLV LIRNS ISS BNS PART 127.8% MLWHT		None	K	T					
28. - First TR Dorsey WAT FV	A	Dividend	J	T	Buy	02/17/23	J		
29. - R2000 STEPUP ISS CIBC PREM 6.10% MLXHQ		None	K	T					
30. - SP500 ARNS ISS BN5 CAP 14.70% MLWHF Pacer US Cash Cows 100	B	Dividend	L	T	Buy	02/17/23	L		
31. SP500 ARN ISS BNS MLUA CAP 15.61%	A	Interest			Redeemed	05/12/23	K	A	
32. SP500 ARN ISS BNS TD MLWVP Cap 18.16%	A	Interest			Redeemed	06/30/23	K	B	
33. SP500 ARN ISS RBC MLWRK Cap 13.07%	A	Interest			Redeemed	02/24/23	K	A	
34. SP500 ARN ISS RBC MLWSJ Cap 14.94%	A	Interest			Redeemed	03/31/23	K	A	

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35. SP500 CLIRN ISS BNS MLWUC Cap 16.36%	A	Interest	K	T					
36. SP500 Notes ISS CIBC Cap 10.00%	A	Interest			Redeemed	12/29/23	L	D	
37. SP500 Notes ISS TD MLXUF Cap 15.00%	A	Interest	L	T					
38. SX5E LIRN ISS BOFA MLWTZ Cap 155%	A	Interest	K	T					
39. IRA #1 (Heading)									
40. - Bank of America NA RASP	A	Dividend	J	T					
41. - Goldman Sachs US Equity Mutual Fund	B	Dividend	M	T					
42. - iShares S&P Global 100 Index Mutual Fund	B	Dividend	L	T					
43. - SPDR US FINANCIAL SECTOR XLF	A	Dividend			Sold	11/14/23	K		
44. - Invesco S&P 500 Quality ETF Shares	B	Dividend	M	T					
45. - Vanguard Dividend Appreciation Fund VIG	C	Dividend	M	T					
46. - First TR Exchange FDN	A	Dividend	K	T					
47. - First TR Consumer FXD	A	Dividend	K	T					
48. - First TR Indstrl FXR	A	Dividend	K	T					
49. - First Trust Capital Strength ETF FTCS	B	Dividend	L	T					
50. - First TR Large Cap Value FTA	B	Dividend	K	T					
51. - First TR Technology FXL	A	Dividend	K	T					

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52. - First Trust Large Cap Growth Oppor FD	A	Dividend	J	T					
53. - First TR NASDQ 100	A	Dividend	K	T					
54. - Ishares Edge Msci USA MTUM	A	Dividend	K	T					
55. Pacer US Small cap cash CALF	A	Dividend	K	T	Buy	11/10/23	J		
56. MSCI EM Notes ISS MLYFM BOFA Cap 20% Due 5/30/25	A	Interest	K	T					
57. SP500 Notes ISS BOFA MLXZV Cap 10%	A	Interest	K	T					
58. SP500 Notes ISS CIBC MLYCC Cap 15%	A	Interest	K	T					
59. The Northwestern Mutual Life Insurance Company (whole life)	C	Interest	L	T					
60. Massachusetts Mutual Life Ins Company (group universal)	B	Interest	J	T					
61. Simons-Michelson-Zieve Note Receivable	B	Interest	L	T					
62. Trust #2 IRR - trust dtd 3/9/2006 (Heading)									
63. - Bank of America (cash)		None	P1	T					
64. - E*TRADE (Heading)									
65. -- Money Market	A	Interest	J	T					
66. -- Apple Inc	A	Dividend			Sold	12/28/23	L		
67. -- Sirius XM Holdings Inc	A	Dividend			Sold	12/28/23	J		
68. - JP Morgan Chase	A	Dividend	K	T					

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69.	Trust #3 - trust dtd 3/16/1983 (Heading)									
70.	- Invesco Brokerage Account (Heading)									
71.	-- Invesco Main Street Fund - MSIGX	A	Dividend	J	T					
72.	-- Invesco Main Street Fund - MSIGX 0197	D	Dividend	M	T					
73.	- Bank of America (cash)	A	Interest	O	T					

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

Part I: Trust # 1 Irrevocable Trust presently is an unfunded trust holding life policy through USAA.

Part I Trust #2 - Revocable Trust - I am not the grantor of the trust. I have a beneficial interest.

Part I Trust # 3 - Irrevocable Trust - I am not the grantor of the trust. I have a beneficial interest.

Part I Personal Representative of Estate - assets administered through Trust #2.

Part VII Line 55: this stock was gifted with no proceeds received.

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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. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Laurie J. Michelson

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
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544