AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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
Morrison, Sarah D.	United States District Court, Southern District of Ohio	08/14/2023
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 Court Judge - Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
U.S District Court 85 Marconi Blvd Columbas, OH 43215		

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.	
2.	
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. 1991	Ohio Public Employees Retirement Plan (defined benefit pension plan)
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.	2022	Self-employed (financial advisor)
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.	Goldman Sachs	Personal Line of Credit	L
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Morrison, Sarah D.	08/14/2023

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	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)	
1. INDIVIDUAL ASSETS (H)									
2. USAA BANK (cash)	A	Interest	L	T					
3. HUNTINGTON BANK (cash)		None	K	T					
4. STRATOS WEALTH HOLDINGS LLC	E	Distribution	L	U					
5. ACCOUNT #1 (H)									
6. LPL FINANCIAL INSURED DEPOSIT ACCOUNT (cash)	A	Interest	J	T					
7. GOLDMAN SACHS MONEY MKT (cash eq.)	A	Interest			Redeemed	01/05/22	L		
8. ALPHABET INC CL C (GOOG)		None	K	T					
9. ALPHABET INC CL A (GOOGL)		None	K	T					
10. APPLE INC (AAPL)	A	Dividend	L	T	Buy (add'l)	05/02/22	K		
11. CHEVRON CORP (CVX)	B	Dividend	K	T	Sold (part)	08/12/22	K		
12. CIGNA CORP NEW (Cl)	A	Dividend	K	T					
13. COCA-COLA COMPANY (KO)	C	Dividend	M	T					
14. ELI LILLY & CO LLY	A	Dividend	L	T					
15. EXXON MOBIL CORP (XOM)	B	Dividend	K	T	Sold (part)	08/12/22	K		
16. FISERV INC (FISV)		None	K	T	Buy	01/03/22	K		
17. GSK PLC SPONSORED ADR NEW (GSK)	B	Dividend	K	T	Buy	08/12/22	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
Morrison, Sarah D.	08/14/2023

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. HALLIBURTON COMPANY (HAL)	A	Dividend	K	T	Buy	05/05/22	K		
19. HEWLETT PACKARD ENTERPRISE COMPANY (HPE)	A	Dividend	K	T	Buy	04/20/22	K		
20. HP INC (HPQ)	B	Dividend	K	T	Buy	04/20/22	K		
21.					Buy (add'l)	05/05/22	K		
22. INTEL CORP (INTC)	B	Dividend	L	T	Buy (add'l)	05/02/22	J		
23.					Buy (add'l)	08/30/22	K		
24. JOHNSON & JOHNSON (JNJ)	B	Dividend	L	T					
25. METAPLATFORMS (META)		None	L	T	Buy (add'l)	02/03/22	K		
26.					Buy (add'l)	07/08/22	K		
27. MOHAWK INDUSTRIES INC (MHK)		None	K	T	Buy	01/03/22	K		
28.					Buy (add'l)	05/02/22	J		
29. OLIN CORP NEW (OLN)	A	Dividend	L	T	Buy	01/03/22	K		
30.					Buy (add'l)	03/07/22	J		
31. PEPSICO INC (PEP)	A	Dividend	K	T					
32. QUEST DIAGNOSTICS INC (DGX)	A	Dividend	K	T					
33. RAYTHEON TECHNOLOGIES (RTX)	A	Dividend	K	T					
34. SCHWAB CHARLES CORP (SCHW)	A	Dividend	K	T					

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
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Morrison, Sarah D.	08/14/2023

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☐ 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)	
35. WELLS FARGO & CO NEW (WFC)	B	Dividend	L	T					
36. DAVIS FUNDAMENTAL SELECT US EQUITY (DUSA)	C	Dividend	M	T	Sold (part)	02/03/22	K	D	
37. DAVIS FUNDAMENTAL SELECT WORLDWIDE ETF (DWLD)	A	Dividend	K	T	Sold (part)	05/02/22	L		
38. DAVIS FUNDAMENTAL SELECT INTL ETF (DINT)		None			Sold	05/02/22	L		
39. ACCOUNT #2 (H)									
40. LPL INSURED CASH ACCOUNT (cash) (Y)									
41. ALIBABA GROUP (BABA)		None	J	T	Buy	03/15/22	J		
42. ACCOUNT #3 (H)									
43. LPL INSURED CASH ACCOUNT (cash) (Y)									
44. ALPHABET INC GL A (GOOGL)		None	J	T	Buy	12/29/22	J		
45. AMAZON.COM INC (AMZN)		None	J	T	Buy	12/29/22	J		
46. OLIN CORP NEW (OLN)	A	Dividend			Buy	03/17/22	J		
47.					Sold	12/29/22	J	B	
48. ACCOUNT #4 (H)									
49. AMERICAN FUNDS, AMCAP FUND-R5E	A	Dividend	J	T	Buy	05/26/22	J		
50.					Buy (add'l)	06/17/22	J		
51.					Buy (add'l)	09/14/22	J		

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	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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52. AMERICAN FUNDS, NEW PERSPECTIVE FUND-R5E		None	J	T	Buy	05/26/22	J		
53.					Buy (add'l)	06/17/22	J		
54.					Buy (add'l)	09/14/22	J		
55. AMERICAN FUNDS, FUNDAMENTAL INVESTORS-R5E	A	Dividend	J	T	Buy	05/26/22	J		
56.					Buy (add'l)	06/17/22	J		
57.					Buy (add'l)	09/14/22	J		
58. ACCOUNT #5 (H)									
59. OHIO DC LIFEPATH 2035		None			Sold	03/21/22	L		
60. ACCOUNT #6 (H)									
61. LPL FINANCIAL INSURED DEPOSIT ACCOUNT (cash)	A	Int./Div.	L	T					
62. ALIBABA GROUP HOLDING LTD (BABA)	A	Dividend	L	T					
63. ALPHABET INC CL A (GOOGL)		None	K	T					
64. APPLE INC (AAPL)	A	Dividend	K	T					
65. BLACKSTONE MORTGAGE TRUST INC CL A (BXMT)		None	K	T	Buy	12/27/22	J		
66. HALLIBURTON COMPANY (HAL)	A	Dividend	K	T	Buy	01/24/22	K		
67. DAVIS FUNDAMENTAL SELECT WORLDWIDE (DWLD)		None			Sold	12/09/22	L		
68. ACCOUNT #7 (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
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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	
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Morrison, Sarah D.	08/14/2023

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69. JPMORGAN CHASE BANK (cash)	A	Int./Div.	K	T					
70. ALPHABET INC CL C (GOOG)	A	Dividend	K	T					
71. AMAZON.COM INC (AMZN)		None	K	T	Buy	04/27/22	K		
72.					Buy (add'l)	05/02/22	J		
73. APPLE INC (AAPL)	A	Dividend	K	T					
74. COPART INC (CPRT)		None	K	T					
75. DNB ASA SPON ADR (DNHBY)	C	Dividend	K	T					
76. HALLIBURTON COMPANY (HAL)	A	Dividend			Buy	01/24/22	J		
77.					Sold	12/12/22	J		
78. HUNTINGTON BANCSHARES INC (HBAN)	A	Dividend	K	T					
79. SCHWAB CHARLES CORP (SCHW)	A	Dividend			Sold	12/12/22	K	D	
80. UP EXPERIENCE INC CL A (UP)		None			Sold	12/12/22	J		
81. ACCOUNT #8 (H)									
82. CALL ALIBABA GRP HLDG $130 EXP 06/16/23 (BABA)		None	J	T	Buy	08/05/22	J		
83. CALL AMAZON COM INC $130 EXP 09/15/23 (AMZN)		None			Buy	06/14/22	J		
84.					Sold	08/01/22	J	D	
85. CALL AMAZON COM INC $160 EXP 09/15/23 (AMZN) (X) (Y)									

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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86. CALL APPLE INC $170 EXP 03/17/23 (AAPL)		None			Buy	09/29/22	J		
87.					Sold	12/09/22	J		
88. CALL GSK PLC $38 EXP 01/19/24 (GSK)		None	J	T	Buy	08/12/22	J		
89. CALL INTEL CORP $37.50 EXP 01/19/24 INTC		None	J	T	Buy	08/30/22	J		
90. CALL META PLATFORMS INC $260 EXP 09/15/23 CL A (META) (X) (Y)									
91. CALL WALGREENS BOOTS $40 EXP 01/19/24 (WBA)		None	J	T	Buy	08/18/22	J		
92. ACCOUNT #9 (H)									
93. AMERICAN FUNDS GROWTH FUND OF AMERICA 529-A (CGFAX)	A	Dividend	K	T	Buy (add'l)	01/03/22	J		
94.					Buy (add'l)	02/01/22	J		
95.					Buy (add'l)	03/01/22	J		
96. ACCOUNT #10 (H)									
97. AMERICAN FUNDS GROWTH FUND OF AMERICA 529-A (CGFAX) (X)	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	
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Name of Person Reporting	Date of Report
Morrison, Sarah D.	08/14/2023

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

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value, per page 45 of the filing instructions.

Name of Person Reporting	Date of Report
Morrison, Sarah D.	08/14/2023

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. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Sarah D. Morrison

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