AO 10
Rev. 1/2022

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2021

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
MOSKOWITZ, Barry T.	Southern District of California	05/12/2022
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**
Senior U.S. District Judge (as of 01/23/2019)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
U.S. Courthouse 333 W. Broadway, Suite 1580 San Diego, CA 92101		

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.	Power of Attorney for family member (managing assets and paying bills)	
2.	Trustee	Trust A
3.	Trustee	Trust B
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.	2021	California State Teachers Retirement System - Pension
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.					

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MOSKOWITZ, Barry T.	05/12/2022

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.	Citi Card (Citi Bank)	Revolving Credit Card Account (1)	J
2.			
3.			
4.			
5.			

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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.	Cabrillo Credit Union (accounts)	A	Interest	M	T					
2.	Ford Common Stock	A	Dividend	K	T					
3.	Apple Common Stock	A	Dividend	K	T					
4.	San Diego County Credit Union (accounts) (Trust A)	A	Interest			Closed	11/12/21	K		
5.	U.S. Bank (accounts) (Trust A)	A	Interest			Closed	10/29/21	K		
6.	Wells Fargo Bank (accounts) (Trust A)	A	Interest	L	T					
7.	Schwab brokerage bank cash sweep (Trust A)	A	Interest	M	T					
8.	American Century CA (BCITX) Bond Fund (A)	C	Dividend	M	T					
9.		A	Distribution							
10.	Vanguard CA Inter Term Bond Fund (VCADX) (A)	B	Dividend	L	T					
11.		A	Distribution							
12.	Vanguard Inflation Bond Fund (VAIPX) (A)	B	Dividend	K	T					
13.		A	Distribution							
14.	I Shares MSCI EAFE ETF (EFA) (A)	B	Dividend	K	T					
15.	Select STR Financial ETF (XLF) (A)	A	Dividend	K	T					
16.	SPDR S&P Mid Cap 400 ETF (MDY) (A)	A	Dividend	K	T					
17.	SPDR S&P 500 ETF (SPY) (A)	B	Dividend	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		

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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				
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18. Apple Common Stock (A)	A	Dividend	J	T	Buy	05/04/21	J		
19. Schwab Bank account (B)	A	Interest	K	T					
20. Schwab Trust B brokerage cash bank sweep (B)	A	Interest	M	T					
21. American Century Inter (twtix) bond fund (B)	B	Dividend	M	T					
22. Doubleline EMRG MKTS (DLENX) bond fund (B)	A	Dividend	K	T					
23. Ridgeworth (Virtus) SEIX INVT bond fund (STTBX) (B)	A	Dividend	L	T					
24.	B	Distribution							
25. Schwab CA Tax Free Bond Fund (SWCAX) (B)	B	Dividend	M	T					
26.	A	Distribution							
27. USAA Tax Exempt Inter bond fund (USATX) (B)	C	Dividend	M	T					
28. Vanguard CA Inter Term bond fund (VCADX) (B)	D	Dividend	M	T					
29.	A	Distribution							
30. Parnassus Core EQTY stock fund (PRBLX) (B)	B	Distribution	K	T					
31.	A	Dividend							
32. I Shares Select DIV. A ETF fund (DVY) (B)	A	Dividend	K	T					
33. SPDR S&P DIV. ETF fund (SDY) (B)	A	Dividend	K	T					
34.									

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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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35.	American Century High MUN bond fund (ABHYX) (B)	B	Dividend	L	T					
36.		A	Distribution							
37.	Vanguard High Yield Corp. bond fund (VWEAX) (B)	B	Dividend	L	T					
38.	Navy Federal Credit Union (accounts)	A	Interest	K	T					
39.	UBS Bank (cash account)(Trust A)	A	Interest	L	T	Buy	07/28/21	L		
40.	State Bank of India (cash account)(Trust A)		None	M	T	Buy	03/19/21	M		
41.	ZYNGA Common Stock		None	J	T					
42.	Bank OZARK (cash account)(Trust A)	A	Interest			Matured	01/22/21	L		
43.	Goldman Sacks Bank (cash account)(Trust A)	A	Interest			Matured	04/22/21	L		
44.	Bank of India (cash account)(Trust A)	A	Interest			Buy	03/19/21	L		
45.						Matured	07/01/21	L		
46.	Bank of China NE (cash account)(Trust A)	A	Interest			Matured	01/25/21	M		
47.	State Bank of India (cash account)(Trust A)	A	Interest			Matured	01/15/21	L		
48.	Discover Bank (cash account)(Trust B)	B	Interest			Matured	04/01/21	L		
49.	Apple Common Stock (Appl)(B)	A	Dividend	K	T	Buy (add'l)	05/04/21	J		
50.	Goldman Sacks Bank (cash account)(Trust B)		None	L	T	Buy	08/16/21	L		
51.	Bank of China NE (cash account)(Trust B)		None	L	T	Buy	08/16/21	L		

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52.	Vanguard Real Estate Fund (VNQ)(X)	A	Dividend	J	T					
53.	Metropolitan West - Total Index Fund (MWTRX)(X)	A	Dividend	J	T					
54.	Vanguard Small cap Index Fund (VSMX) (X)	A	Dividend	J	T					
55.	Bangor Savings Bank (cash account)(A)	A	Interest			Buy	01/21/21	L		
56.						Matured	04/28/21	L		
57.	Mizuho Bank (cash account)(A)	A	Interest			Buy	05/04/21	L		
58.						Matured	11/12/21	L		
59.	MidFirst Bank (cash account)(A)	A	Interest			Buy	05/04/21	L		
60.						Matured	08/12/21	L		
61.	Bangor Savings Bank (cash account)(B)	A	Interest			Buy	01/21/21	L		
62.						Matured	04/28/21	L		
63.	Goldman Sachs (cash account)(B)	A	Interest			Buy	04/23/21	L		
64.						Matured	11/05/21	L		
65.	MidFirst Bank (cash account)(B)	A	Interest			Buy	05/04/21	M		
66.						Matured	08/12/21	M		
67.	Bank of China NE (cash account)(A)		None	L	T	Buy	08/16/21	L		

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

VII.
In 2016, I became the successor trustee for one of [redacted] who is the lifetime beneficiary of the trusts. I also started acting as power of attorney for the same [redacted] in 2016. Pursuant to the Instruction, the investment assets subject to the power of attorney were not reported. The assets in Trusts A and B are denoted by (Trust A) or (A) or (Trust B) or (B) respectively. [redacted] California Teachers Retirement System account is a defined benefit plan. In 2020, the payments exhausted the deposits and it had no residual value. It should have been listed with a (Y) for 2020 and is not listed in section VII for 2021.
I inherited some Apple Common Stock that was added to the value for section VII, line 4.

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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/ Barry T. MOSKOWITZ

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 G-330
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Washington, D.C. 20544