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
MOSKOWITZ, Barry T.	Southern District of California	05/09/2024
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**
Senior U.S. District Judge (as of 01/23/2019)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
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.	Trustee	[redacted] Trust A
2.	Trustee	[redacted] Trust B
3.	Trustee	[redacted] revocable trust (no reportable assets)
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	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.	05/09/2024

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.	L.L. Bean Master Card (Citi Bank)	Revolving Credit Card Account (1)	J
3.	Wells Fargo Visa Card	Revolving Credit Card Account	K
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. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure		B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(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	L	T					
2.	Ford Common Stock	B	Dividend	J	T					
3.	Apple Common Stock	A	Dividend	L	T	Buy (add'l)	01/04/23	J		
4.	Wells Fargo Bank (cash accounts) (Trust A)	A	Interest	L	T					
5.	Schwab brokerage money market (Trust A) cash sweep (Y)									
6.	Schwab Bank account (B) (Y)									
7.	Schwab Trust B brokerage cash bank sweep (B) (Y)									
8.	Navy Federal Credit Union (cash accounts)	A	Interest	J	T					
9.	Metropolitan West - Total Index Fund (MWTRX)	A	Dividend	J	T	Sold (part)	03/20/23	J		
10.	Vanguard Small cap Index Fund (VSMDZ)	A	Dividend			Sold	12/27/23	J	C	
11.	Bank of China (cash account)	B	Interest			Buy	02/15/23	M		
12.						Matured	08/28/23	M		
13.	Bank of China (cash account)	A	Interest			Buy	09/08/23	K		
14.						Matured	12/15/23	K		
15.	Bank of China (cash account)		None	K	T	Buy	12/18/23	K		
16.	I Shares Select DIV (DVY)	A	Dividend	J	T					
17.	SPDR S and P DIV. ETF (SDY)	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; 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. 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. American Century High Yield (ABHYX)	A	Dividend	K	T					
19. American Century Interm (TWTIX)	B	Dividend	K	T					
20. Doubleline Emerging Markets (DLENX)	A	Dividend			Sold	12/27/23	J		
21. Schwab Tax Free Bond Fund (SWCAX)	A	Dividend			Sold	09/05/23	K		
22. USAA Tax Exempt Intermed Bond Fund (US ATX)	B	Dividend	K	T					
23. Vanguard CA Interm Term (VCADX)	B	Dividend	L	T					
24. Parmassus Core Equity Fund (PRBLX)	B	Dividend	K	T					
25. Wells Fargo (cash account)	B	Interest			Matured	05/15/23	K		
26. Wells Fargo (cash account)		None	L	T	Buy	05/23/23	L		
27. I Shares MSCI EAFE ETF (EFA)	A	Dividend	J	T					
28. Select STR Financial ETF (XLF)	A	Dividend	J	T					
29. SPDR S&P Midcap 400 ETF (MDY)	A	Dividend	J	T					
30. SPDR S&P 500 ETF (SPY)	A	Dividend	K	T					
31. Vanguard Inflation Protected SECS (VAIPX)	A	Dividend	J	T					
32. Valley NTNL Bank (cash account)	A	Interest			Matured	02/09/23	L		
33. American Century CA Interm (BCITX)	B	Dividend	K	T					
34. Bank of America (cash account)		None	M	T	Buy	08/29/23	M		

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35. Schwab Bank (cash sweep)	A	Interest	K	T					

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

VII.
In 2016, I became the trustee for my [redacted] trusts. The assets in Trusts A and B are denoted by (Trust A) or (A) or (Trust B) or (B) respectively.

My [redacted] and I are the co-trustees of our own revocable [redacted] trust. There are no reportable assets in the trust, see Positions, line 3. I inadvertently left this position off of previous reports.

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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/ 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. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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