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
Motz, Diana G.	Fourth Circuit Court of Appeals	05/15/2023
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**
Fourth Circuit Judge - Senior Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
U.S. Courthouse 101 West Lombard St Baltimore, Maryland 21201		

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.	Custodian	College Savings Plan #1
2.	Custodian	College Savings Plan #2
3.	Custodian	College Savings Plan #3
4.	Custodian	College Savings Plan #4
5.	Trustee	Generation Skipping Trust for [redacted] (GST)
6.	Trustee	Life Insurance Trust #2

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.		
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.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Motz, Diana G.	05/15/2023

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. Altria Group Inc (MO)	B	Dividend	K	T					
2. Apple Inc (AAPL)	D	Dividend	P1	T					
3. AT&T Inc (T)	C	Dividend	K	T					
4. Campbell Soup Co (CPB)	A	Dividend	J	T					
5. Chevron Corp (CVX)	B	Dividend	L	T					
6. CVS Health Corp (CVS)	B	Dividend	L	T					
7. DoubleLine Total Return Bond Fund Class I (DBLTX) (IRA)	C	Dividend	M	T					
8. Duke Realty Corp (DRE)	B	Dividend			Merged (with line 50)	10/03/22	L		
9. Exxon Mobil Corporation (XOM)	D	Dividend	M	T					
10. Fidelity 500 Index Fund (FXAIX)	D	Dividend	N	T	Sold (part)	01/03/22	K	E	
11. Fidelity Extended Market Index (FSMAX)	A	Dividend	K	T					
12. Fidelity Inflation Protected Bond Index I (FIPDX) (IRA)	D	Dividend	K	T	Buy (add'l)	09/20/22	L		
13. Fidelity Interm Trs Bond Index Instl Prm (FUAMX) (IRA)	A	Dividend			Sold	09/20/22	L		
14. Fidelity Md Municipal Income (SMDMX)	B	Dividend			Buy (add'l)	05/10/22	L		
15.					Sold (part)	07/06/22	M		
16.					Buy (add'l)	09/07/22	M		
17.					Sold	10/21/22	M		

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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18. Fidelity Treasury Money Market Fund (FZFXX)	B	Dividend	K	T					
19. General Electric Company (GE)	A	Dividend	J	T					
20. International Business Machines (IBM)	D	Dividend	M	T					
21. Invesco National AMT-Free Municipal Bond (PZA)	B	Dividend			Sold	10/21/22	L		
22. Invesco S&P 500 Equal Weight (RSP)	C	Dividend	M	T					
23. Invesco Taxable Municipal Bond ETF (BAB) (IRA)	C	Dividend	K	T					
24. iShares CMBS ETF (CMBS) (IRA)	B	Dividend	L	T					
25. iShares Core MSCI Emerging Markets (IEMG)	B	Dividend	K	T					
26. iShares Core S&P 500 (IVV) (IRA)	D	Dividend	N	T					
27. iShares Core S&P Small-Cap ETF (IJR)	C	Dividend	M	T					
28. iShares Russell 1000 ETF (IWB)	D	Dividend	O	T					
29. iShares Russell 2000 ETF (IWM)	A	Dividend	L	T					
30. iShares MBS ETF (MBB) (IRA)	A	Dividend	L	T	Buy	06/08/22	L		
31. iShares S&P 100 (OEF)	C	Dividend	M	T					
32. iShares S&P Small-Cap 600 Value (IJS)	B	Dividend	M	T					
33. Kraft Heinz Company (KHC)	A	Dividend	J	T					
34. Kyndryl Hldgs Inc Com (KD)		None	J	T					

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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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35. Merck & Co Inc (MRK)	B	Dividend	L	T					
36. Mondelez Intl Inc (MDLZ)	A	Dividend	K	T					
37. Nuveen AMT-Free Municipal Value (NUW)	B	Dividend	L	T	Buy	04/21/22	J		
38.					Buy (add'l)	04/22/22	K		
39.					Buy (add'l)	09/21/22	K		
40. Nuveen Municipal Value (NUV)	A	Dividend			Buy	02/04/22	K		
41.					Sold	04/22/22	K		
42. Nuveen Quality Municipal Income Fund (NAD)	B	Dividend			Sold (part)	01/03/22	K	C	
43.					Sold	09/21/22	K		
44. Nuveen Sel Txfr Income-1 (NXP)	C	Dividend	L	T					
45. Organon & Co (OGN)	A	Dividend	J	T					
46. Olin Corp (OLN)	A	Dividend	J	T					
47. Pepsico Incorporated (PEP)	C	Dividend	M	T					
48. Philip Morris International Inc (PM)	C	Dividend	L	T					
49. PIMCO Income Fund Instl (PIMIX) (IRA)	D	Dividend	L	T					
50. ProLogis Inc (PLD)	A	Dividend	L	T					
51. Schwab International Equity (SCHF)	C	Dividend	M	T					

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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; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

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52. SPDR S&P 500 Trust (SPY)	C	Dividend	N	T					
53. Stanley Black & Decker Inc (SWK)	B	Dividend	K	T					
54. Stone Ridge Reinsurance Risk Premium (SRRIX) (IRA)		None			Sold (part)	02/25/22	J		
55.					Sold	05/20/22	J		
56. T Rowe Price MD Tax Free Bond (MDXBX)	D	Dividend	M	T	Sold (part)	04/21/22	J		
57.					Sold (part)	05/10/22	L		
58.					Buy (add'l)	07/06/22	M		
59.					Sold (part)	09/07/22	M		
60.					Buy (add'l)	10/21/22	M		
61. T Rowe Price Value (TRVLX)	D	Dividend	M	T					
62. T. Rowe Price Group Inc (TROW)	D	Dividend	N	T					
63. Union Pacific Corp (UNP)	D	Dividend	N	T					
64. VanEck AMT-Free Long Municipal Index ETF (MLN)	A	Dividend	L	T	Buy	10/21/22	L		
65. Vanguard FTSE Emerging Markets (VWO)	D	Dividend	M	T					
66. Vanguard GNMA Admiral (VFIJX) (IRA)	C	Dividend	M	T	Sold (part)	02/04/22	L		
67.					Sold (part)	03/10/22	K		
68.					Buy (add'l)	12/01/22	K		

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69.	Vanguard High-Yield Tax-Exempt Admiral (VWALX)	C	Dividend	L	T	Sold (part)	12/23/22	K		
70.	Vanguard Inter-Term Inv Grade Adm (VFIDX)	B	Dividend			Buy	03/10/22	K		
71.						Sold	12/01/22	K		
72.	Vanguard Int-Term Tax-Exempt Adm (VWIUX)	A	Dividend			Sold	02/04/22	K		
73.	Vanguard Large-Cap Index Fund ETF (VV)	C	Dividend	M	T					
74.	Vanguard Short-Term Inv Grade Admiral (VFSUX)	A	Dividend			Buy	02/04/22	L		
75.						Sold	06/08/22	L		
76.	Wabtec Corporation (WAB)	A	Dividend	J	T					
77.	Warner Bros Discovery Inc Series A (WBD)		None	J	T	Spinoff (from line 3)	04/11/22	J		
78.	Elme Communities Sh Ben Int (ELME)	B	Dividend	L	T					
79.	Yum China Holdings Inc (YUMC)	A	Dividend	K	T					
80.	Yum! Brands Inc (YUM)	B	Dividend	M	T					
81.	MD 529 - Bond & Income Portfolio (CUST)		None	K	T					
82.	MD 529 - Equity Index 500 Portfolio (CUST)		None	L	T	Sold (part)	05/19/22	K		
83.	MD 529 - Global Equity Mkt Index Port (CUST)		None	M	T	Buy (add'l)	05/19/22	K		
84.	MD 529 - T Rowe Price US Bond Enhanced Index (CUST)		None	M	T					
85.	Vanguard529 - Vanguard Inflation-Protected Securities Portfolio(CUST)		None	K	T	Buy	09/28/22	J		

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86.					Buy (add'l)	10/07/22	J		
87. Vanguard 529 - Vanguard Interest Accumulation Portfolio (CUST)		None	L	T	Sold (part)	09/28/22	J		
88.					Sold (part)	09/28/22	J		
89.					Sold (part)	10/07/22	J		
90. Vanguard 529 - Vanguard Total Bond Market Index Portfolio (CUST)		None	M	T	Sold (part)	09/28/22	J		
91.					Buy (add'l)	09/28/22	J		
92.					Buy (add'l)	10/07/22	J		
93. Vanguard529- Vanguard Total International Stock Index Portfolio (CUST)		None	L	T	Buy (add'l)	09/28/22	J		
94.					Buy (add'l)	09/28/22	J		
95.					Buy (add'l)	10/07/22	J		
96. Vanguard 529 - Vanguard Total Stock Market Index Portfolio (CUST)		None	M	T	Buy (add'l)	09/28/22	J		
97.					Buy (add'l)	09/28/22	J		
98.					Buy (add'l)	10/07/22	J		
99. Generation Skipping Trust (H)									
100. - TRP Blue Chip Growth Fund Class I (TBCIX)	E	Dividend	N	T					
101. - TRP International Bond Fund (RPIBX)	A	Dividend	K	T					
102. - TRP International Stock Fund (PRITX)	A	Dividend	L	T					

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103. - TRP Equity Income Fund (PRFDX)	D	Dividend	M	T					
104. - TRP Global Stock Fund (PRGSX)		None	M	T					
105. - TRP Growth Stock Fund (PRGFX)		None			Sold	02/11/22	O		
106. - TRP Growth Stock Fund - I Class (PRUFX)	D	Dividend	N	T	Buy	02/11/22	O		
107. - TRP New Era Fund (PRNEX)	B	Dividend	K	T					
108. - TRP Government Money Fund (PRRXX)	C	Dividend	M	T					
109. - TRP Spectrum Diversified Equity Fund (PRSGX)	E	Dividend	M	T					
110. Rental Property, Baltimore, MD ($578,550; 2014) (X)	E	Rent	O	R					
111. Life Insurance Trust #1 (H)									
112. - Fidelity Cash Fund		None	K	T	Open	12/07/22	K		
113. Life Insurance Trust #2 (H)									
114. - Fidelity Cash Fund		None	K	T	Open	12/13/22	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
Motz, Diana G.	05/15/2023

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

On 4/11/22, Warner Brothers Discovery (WBD) (Line 77) spun off from AT&T (T) (Line 3).
On 10/3/22, ProLogis Inc (PLD) (Line 50) merged with Duke Realty Corp (DRE) (Line 8), which is how PLD was acquired.
On 10/17/22, Washington Real Estate (WRE) changed its company name to Elme Communities (ELME) (Line 79).
On 2/11/22, TRP Growth Stock Fund (PRGSX) (Line 104) was converted to TRP Growth Stock Fund – I Class (PRUFX) (Line 105), which is a different share class of the same mutual fund.
Schwab International Equity (SCHF) (Line 51) was inadvertently excluded from the 2021 report, but its purchase was reported on Line 55 of the 2020 report.

Name of Person Reporting	Date of Report
Motz, Diana G.	05/15/2023

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/ Diana G. Motz

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
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