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
Nelson, Susan	U.S. District Judge, District of Minnesota	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**
U.S. District Judge (Senior)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
316 N. Robert Street St. Paul, MN 55101		

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.	Member	University of St. Thomas School of Law Board of Governors
2.	Member	Advisory Board, Minnesota Women Lawyers
3.	Member	Board of the Infinity Project
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	Stinson Leonard Street LLP (salary)
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
Nelson, Susan	05/09/2024

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.	Individual Assets (H)									
2.	Alerus Bank (cash)	A	Interest	K	T					
3.	Account #1 (H)									
4.	UBS Bank USA (cash) (Y)									
5.	Americanbn Lndn Inc Eq Y (ABCYX)	B	Dividend	L	T					
6.	Brown Advisory Sustainable Growth Fund (BAFWX)	A	Dividend	L	T	Sold (part)	08/25/23	J	A	
7.	JP Morgan International Equity Fund (VSIEX)	A	Dividend	K	T					
8.	Virtus Kar Small-Mid Cap Core Fund (VKSIX)		None	K	T					
9.	Mitsubishi UFJ Finl Group Inc (606822BA1)		None			Redeemed	07/26/23	J	A	
10.	Sumitomo Mitsui Finl Group (86562MBF6)	A	Interest			Redeemed	10/16/23	J	A	
11.	Goldman Schs Group Inc (38141GVM3)	A	Interest	J	T					
12.	Mitsubishi UFJ Fin Grp (606822BD5)	A	Interest	J	T					
13.	JPMorgan Chase & Co (46647PBZ8)	A	Interest			Redeemed	03/16/23	J	A	
14.	Morgan Stanley (61746BDQ6)	A	Interest	J	T					
15.	PNC Financial Services (693475AP0)	A	Interest	J	T					
16.	Royal Bk of Canada (78016EZH3)	A	Interest	J	T					
17.	Sherwin-Williams Co (824348BQ8)	A	Interest	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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☐ 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. Bank of Amer Corp (06051GFH7)	A	Interest	J	T					
19. DTE Energy Co NTS (233331BD8)	A	Interest	J	T					
20. Bk of Nova Scotia (064159TF3)	A	Interest	J	T					
21. Westpac Banking Corp NTS (961214EH2)	A	Interest	J	T	Buy	03/17/23	J		
22. Cheniere Corp Christi HD (16412XAC9)	A	Interest	J	T					
23. Wells Fargo & Co (95000U2T9)	A	Interest	J	T					
24. Fiserv Inc (337738AP3)	A	Interest	J	T					
25. Paypal Hldgs Incorp (70450YAG8)	A	Interest	J	T					
26. Pacific Gas & Elec Co (694308JL2)	A	Interest	J	T					
27. Morgan Stanley Nt Intl (6174468J1)	A	Interest	J	T					
28. Charter Comm Opt (161175AY0)	A	Interest	J	T					
29. Amer Express Co (025816CY3)	A	Interest	J	T					
30. Southern Calif Edison Co (842400GN7)	A	Interest	J	T	Buy	02/23/23	J		
31. Canadian Imperial Bank (13607H6M9)	A	Interest	J	T					
32. Comcast Corp (20030NDZ1)	A	Interest	J	T					
33. Astrazeneca PLC (046353AL2)	A	Interest	J	T					
34. Air Lease Corp (00914AAJ1)	A	Interest	J	T	Buy	05/09/23	J		

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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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	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)	
35.						Buy (add'l)	07/27/23	J		
36.	WEC Energy Group Inc NTS (92939UAM8)		None	J	T	Buy	11/03/23	J		
37.	JPMorgan Hedged Equity 2 (JHQDX)	A	Dividend	K	T					
38.	Account #2 (H)									
39.	Dodge & Cox Intl Stock (DODFX)		None	L	T					
40.	Vanguard Retirement Savings Trust III	A	Dividend	K	T					
41.	Vanguard Total Bond Market Instl (VBTIX)	B	Dividend	L	T					
42.	Frost Total Return Bond Instl (FIJEX)	B	Dividend	K	T					
43.	Vanguard Target Retirement 2020 Tr II		None	K	T					
44.	Vanguard Target Retirement Inc Tr II	A	Dividend	N	T					
45.	Vanguard Equity Income Fund Adm (VEIRX)	C	Dividend	K	T					
46.	Vanguard Inst Index Fund (VINIX)	C	Dividend	M	T					
47.	Account #3 (H)									
48.	UBS Insured Sweep (cash)	A	Interest	K	T					
49.	UBS Select Prime Institutional Fund (SELXX)	D	Dividend	M	T	Sold (part)	02/27/23	K		
50.						Buy (add'l)	03/24/23	L		
51.						Sold (part)	03/30/23	J		

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2. Value Codes (See Columns C1 and D3)
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52.					Sold (part)	04/05/23	J		
53.					Sold (part)	04/26/23	J		
54.					Sold (part)	04/28/23	J		
55.					Sold (part)	05/03/23	K		
56.					Sold (part)	05/10/23	L		
57.					Buy (add'l)	08/04/23	M		
58.					Sold (part)	08/09/23	J		
59.					Sold (part)	08/15/23	J		
60.					Sold (part)	08/24/23	K		
61.					Sold (part)	09/01/23	K		
62.					Buy (add'l)	09/08/23	J		
63.					Sold (part)	09/21/23	K		
64.					Sold (part)	09/25/23	J		
65.					Sold (part)	10/11/23	K		
66.					Sold (part)	11/08/23	J		
67.					Sold (part)	12/07/23	J		
68.					Sold (part)	12/11/23	J		

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69. GS Finance Corp L/O TC-YN Ruj SVX	A	Interest			Redeemed	02/13/23	K		
70. UBS AG L/O TC-YN Indu TRY	A	Interest			Redeemed	06/28/23	K		
71. Bofa Finance LLC TC-YN	B	Interest			Redeemed	08/09/23	K		
72. Canadian Imperial Bank L/O TC-YN RTY SPX	B	Interest			Buy	02/15/23	K		
73.					Redeemed	12/19/23	K		
74. Citigroup Inc NTS B/E (17290AE89)	C	Interest	L	T					
75. Royal Bk of Canada (78014REN6)	C	Interest	L	T					
76. New Jersey Econ Dev Auth Rv (64577XAE6)	B	Interest	L	T					
77. New Jersey Econ Dev Auth Rv Pref (64577XAB2)	A	Interest	J	T					
78. NJ Eco Dv Uth Sch Facs Sr II Rv (645918M67)	B	Interest			Redeemed	05/31/23	L		
79. California Health Facs F Rv Pref (13032UXG8)	B	Interest	K	T					
80. New Jersey Trans Trust A-1 Rv (6461362B6)	A	Interest	K	T					
81. Liberty N Y Dev Corp Rev (531127AC2)	C	Interest	L	T					
82. Chicago IL O Hare Intl A Sr C Rv (167593VT6)	C	Interest	L	T					
83. New York Transn Dev Corp Rv (650116CQ7)	C	Interest	L	T					
84. Bexar Cnty TX For Issue 2017 (088281D64)	B	Interest	K	T					
85. Met Govt Nashville & Dav Sr A Rv (592041WG8)	D	Interest	M	T					

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86. Massachusets St Dev Fin Rv (57584XEH0)	C	Interest	L	T					
87. Massachusets St Dev Fin Rv (57584YAG4)	C	Interest	L	T					
88. Hillsborough Cnty Fl Av Sr A Rv (432275AA3)	C	Interest	M	T					
89. Alachua Co Fl Hfa Sr A Rv (010685KF1)	C	Interest	L	T					
90. Pennsylvania St Tpk Comm Sr C Rv (709224FT1)	C	Interest	M	T					
91. New Jersey St Tpk Auth Sr E (6461395W1)	C	Interest	M	T					
92. Edinburg TX Loc Govt FI Assur Sr a Rv (208797AS0)	C	Interest	L	T					
93. The City of NY Sr E (64966MXP9)	B	Interest	L	T					
94. New York St HSG Fin Agy Sr C Rv (64987DVQ4)	B	Interest	L	T					
95. Omaha Pub Pwr Dist NE Sr A Rv (682004FH4)	B	Interest	K	T					
96. California Health Facs F Rv (13032UXH6)	C	Interest	L	T					
97. Sarasota Cnty Fla Pub 2018 Rv (83301DK3)	A	Interest	J	T					
98. Stephen F Austin St Univ Sr A Rv (8586203B1)	C	Interest	L	T					
99. Massachusetts St Transn Sr A Rv (57604THJ8)	B	Interest	K	T					
100. Barclays Bank PLC Mln Intl Basket (06749NRT1)		None	L	T	Buy	02/24/23	K		
101. Citigroup Global Markets A-MLN SPX (17330PKB4)		None	M	T					
102. Blackstone Private Credit (189997J83)	D	Interest	L	T					

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103. Starwood Real Estate Income Trust, Inc Escrow (85571B907)	C	Interest	L	T					
104. Citigroup Glob Mark Hldgs Inc (17330PCE7)	C	Interest	L	T					
105. Account #4 (H)									
106. UBS Bank USA (cash)	A	Interest	J	T					
107. Americanbn Lndn Inc Eq Y (ABCYX)	C	Dividend	M	T					
108. Brown Advisory Sustainable Growth Fund Class insitutional (BAFWX)	A	Dividend	M	T	Sold (part)	06/09/23	J	A	
109. UBS US Dividend Ruler Price Fund Class P (DVRUX)	B	Dividend	L	T					
110. UBS US Quality Growth at Responsible Price Fund Class P (QGRPX)	A	Dividend	L	T	Sold (part)	12/15/23	J	A	
111. Virtus Kar Small-Mid Cap Core Fund Class I (VKSIX)		None	M	T					
112. Account #5 (H)									
113. UBS Bank USA (cash)	A	Interest	J	T					
114. Connecticut St Sp Tax Ob (207758B36)	A	Interest			Redeemed	05/01/23	J		
115. Cook Cnty Il Sch N O 105 (214489BK1)	A	Interest	J	T					
116. Sharonville Oh Spl Obl I Build (819878AQ2)	A	Interest	J	T					
117. Pinckney Mi Cmnty Schs L (722205NB3)	A	Interest	J	T					
118. Northside Tx Indpt Sch D (66702RKN1)	A	Interest	J	T					
119. Kentucky Infras Auth (4913137F3)	A	Interest	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

Name of Person Reporting	Date of Report
Nelson, Susan	05/09/2024

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)	
120. Alabama Fed Aid Hwy Fin (010268CC2)	A	Interest	J	T					
121. Louisiana Loc Govt Envir (54628CKA9)	A	Interest	J	T					
122. Blue Springs Mo (096045HJ1)	A	Interest	J	T					
123. Maricopa Cnty Ariz Sch Dist 001 Phoenix Elem Sch Impt-Proj (566865KK6)		None	J	T	Buy	05/10/23	J		
124. Boward Cnty Fl Tourist (115085AE2)	A	Interest	J	T					
125. Clark Cnty Nev (181006HM2)	A	Interest	J	T					
126. Matanuska- Susitna Boro A (576553BR1)	A	Interest	J	T					
127. New York NY City Transi (64971X4R6)	A	Interest	K	T	Buy	05/22/23	K		
128. Oklahoma St Wtr Res Brd St Ln Program (67920QX29)	A	Interest	K	T	Buy	05/24/23	K		
129. Tempe Ariz Go Bds (87973EBD0)		None	K	T	Buy	05/24/23	K		
130. Rhode Infrastructure Bk St Revolving (76223MBH4)	A	Interest	K	T	Buy	05/24/23	K		
131. Horseshoe Bay TX Go Bds (440752FS7)		None	K	T	Buy	05/23/23	K		
132. Account #6 (H)									
133. Voya Tomorrow's Scholar 529 Conservative Plus		None	K	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		

Name of Person Reporting	Date of Report
Nelson, Susan	05/09/2024

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.

Parenthetical numbers in Part VII are CUSIP numbers.

Name of Person Reporting	Date of Report
Nelson, Susan	05/09/2024

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/ Susan Nelson

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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