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
Nichols, Carl J.	U.S. District Court for the District of Columbia	04/15/2024
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**
District Court Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final	01/01/2023 **to** 12/31/2023
	5b. ☐ Amended Report	
7. Chambers or Office Address		
333 Constitution Ave, NW Washington, DC 20001		

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.		
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.	01/01/2023	THE ASPEN INSTITUTE, INC.
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
Nichols, Carl J.	04/15/2024

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)	
1.	CITIBANK CHECKING ACCT	A	Interest	J	T					
2.	CITIBANK SAVINGS ACCT	A	Interest	J	T					
3.	MERRILL LYNCH DEPOSIT ACCT	A	Interest	M	T					
4.	CPG CARLYLE COMMITMENTS CLASS A	E	Distribution	N	T					
5.	PSRP SPECIAL SITUATIONS ENHANCED-LIQUIDITY	A	Distribution	K	T					
6.	PSRP PASSIVE US EQUITIES	A	Distribution	K	T					
7.	PSRP PASSIVE NON-US EQUITIES	A	Distribution	K	T					
8.	PSRP PASSIVE US BONDS	A	Distribution	J	T					
9.	MPPP SPECIAL SITUATIONS ENHANCED-LIQUIDITY	A	Distribution	K	T					
10.	MPPP PASSIVE US EQUITIES	A	Distribution	J	T					
11.	MPPP PASSIVE NON-US EQUITIES	A	Distribution	J	T					
12.	MPPP PASSIVE PASSIVE US BONDS	A	Distribution	J	T					
13.	TIAA AME 2035 TAR RET R6	A	Distribution	M	T	Buy	01/03/23	M		
14.	AXA EQUITABLE LARGE CAP VALUE	A	Dividend	K	T					
15.	AXA EQUITABLE INTERNATIONAL CORE VOLATILITY	A	Dividend	K	T					
16.	AXA EQUITABLE LARGE CAP GROWTH	A	Dividend	K	T					
17.	AXA EQUITABLE MODERATE ALLOCATION	A	Dividend	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			

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Nichols, Carl J.	04/15/2024

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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		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)	
18.	AXA EQUITABLE 2000 MANAGED VOLATILITY	A	Dividend	K	T					
19.	THIRD AVENUE VALUE FUND INSTL CLASS	A	Dividend	K	T					
20.	BLACKSTONE REAL ESTATE INCOME TRUST CLASS S	D	Distribution	M	T					
21.	COLUMBIA EMERGING MARKETS FUND-1	A	Dividend	K	T					
22.	ACAP STRATEGIC FUND	D	Distribution	N	T					
23.	IDIRECT PRIVATE MKTS FUND FKA ICAPITAL KKR PRIVATE MARKETS	E	Distribution	N	T					
24.	PMF TEI FUND, LP	A	Dividend	J	T					
25.	BLACKSTONE REAL ESTATE INCOME TRUST INC CLASS S (71F319991)	D	Dividend	N	T					
26.	PARTNERS GROUP PRIVATE EQUITY MASTER FUNDTD	D	Distribution	O	T					
27.	IRONWOOD MULTI-STRATEGY FUND LLC (8EOB89997)	D	Dividend	M	T					
28.	VANECK VECTORS FALLEN ANGEL HIGH YIELD B EXECUTED 100% (ANGL)	A	Dividend			Sold	01/18/23	J		
29.	AMER FUNDS NEW PERSPECTIVE FUND (ANWFX)	C	Dividend	L	T					
30.	BLACKROCK AGE 14-15 A	A	Dividend			Sold	02/27/23	L		
31.	BLACKROCK 2027 ENROLL A	A	Dividend	L	T	Buy	02/27/23	L		
32.						Buy (add'l)	03/03/23	J		
33.						Buy (add'l)	04/03/23	J		

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34.					Buy (add'l)	05/03/23	J		
35.					Buy (add'l)	06/03/23	J		
36.					Buy (add'l)	07/03/23	J		
37.					Buy (add'l)	08/03/23	J		
38.					Buy (add'l)	09/03/23	J		
39.					Buy (add'l)	10/03/23	J		
40.					Buy (add'l)	11/03/23	J		
41.					Buy (add'l)	12/03/23	J		
42.	FRTEMP 13-14 A	A	Dividend			Sold	02/27/23	L	
43.	FRTEMP 2028 ENROLL A	A	Dividend	L	T	Buy	02/27/23	L	
44.					Buy (add'l)	03/03/23	J		
45.					Buy (add'l)	04/03/23	J		
46.					Buy (add'l)	05/03/23	J		
47.					Buy (add'l)	06/03/23	J		
48.					Buy (add'l)	07/03/23	J		
49.					Buy (add'l)	08/03/23	J		
50.					Buy (add'l)	09/03/23	J		

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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51.					Buy (add'l)	10/03/23	J		
52.					Buy (add'l)	11/03/23	J		
53.					Buy (add'l)	12/03/23	J		
54. MFS 14-15 A	A	Dividend			Sold	02/27/23	L		
55. MFS 2027 ENROLL A	A	Dividend	L	T	Buy	02/27/23	L		
56.					Buy (add'l)	03/03/23	J		
57.					Buy (add'l)	04/03/23	J		
58.					Buy (add'l)	05/03/23	J		
59.					Buy (add'l)	06/03/23	J		
60.					Buy (add'l)	07/03/23	J		
61.					Buy (add'l)	08/03/23	J		
62.					Buy (add'l)	09/03/23	J		
63.					Buy (add'l)	10/03/23	J		
64.					Buy (add'l)	11/03/23	J		
65.					Buy (add'l)	12/03/23	J		
66. BLKROCK 19+ A	A	Dividend			Sold	01/03/23	L		
67. BLKROCK ENROLLED	A	Dividend	L	T	Buy	01/03/23	L		

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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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68.					Buy (add'l)	02/03/23	J		
69.					Buy (add'l)	03/03/23	J		
70.					Buy (add'l)	04/03/23	J		
71.					Buy (add'l)	05/03/23	J		
72.					Buy (add'l)	06/03/23	J		
73.					Buy (add'l)	07/03/23	J		
74.					Buy (add'l)	08/08/23	J		
75.					Buy (add'l)	09/03/23	J		
76.					Buy (add'l)	10/03/23	J		
77.					Buy (add'l)	11/03/23	J		
78.					Buy (add'l)	12/03/23	J		
79.	FRANK TEMP 19 A	A	Dividend			Sold	01/03/23	K	
80.	FRANK TEMP ENROLLED	A	Dividend	K	T	Buy	01/03/23	K	
81.					Buy (add'l)	02/03/23	J		
82.					Buy (add'l)	03/03/23	J		
83.					Buy (add'l)	04/03/23	J		
84.					Buy (add'l)	05/03/23	J		

1. Income Gain Codes: (See Columns B1 and D4)
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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
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P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
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85.					Buy (add'l)	06/03/23	J		
86.					Buy (add'l)	07/03/23	J		
87.					Buy (add'l)	08/03/23	J		
88.					Buy (add'l)	09/03/23	J		
89.					Buy (add'l)	10/03/23	J		
90.					Buy (add'l)	11/03/23	J		
91.					Buy (add'l)	12/03/23	J		
92.	MFS AGE 18+ A	A	Dividend			Sold	01/03/23	K	
93.	MFS ENROLLED	A	Dividend	L	T	Buy	01/03/23	L	
94.						Buy (add'l)	02/03/23	J	
95.						Buy (add'l)	03/03/23	J	
96.						Buy (add'l)	04/03/23	J	
97.						Buy (add'l)	05/03/23	J	
98.						Buy (add'l)	06/03/23	J	
99.						Buy (add'l)	07/03/23	J	
100.						Buy (add'l)	08/03/23	J	
101.						Buy (add'l)	09/03/23	J	

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	
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102.					Buy (add'l)	10/03/23	J		
103.					Buy (add'l)	11/03/23	J		
104.					Buy (add'l)	12/03/23	J		
105.					Sold (part)	12/01/23	K	A	
106. FRANK TEMP 20+ A	A	Dividend			Sold	01/03/23	J		
107. BLACKSTONE PRIVATE CREDIT FUND	B	Dividend	L	T					
108. BLUE OWL CAPITAL CORP FKA OWL ROCK CORE INCOME	B	Dividend	L	T					
109. VANGUARD INTERMEDIATE TERM BOND ETF	A	Dividend	K	T					
110. EATON VANCE FLOATING RATE FUND (EIBLX)	A	Dividend	J	T					
111. ISH USD HIGH YIELD CORPORATE BOND (USHY)	C	Dividend	K	T					
112. ISHARES BROAD USD INVST GRADE (USIG)	D	Dividend	M	T					
113. ISHARES MBS ETF (MBB)	B	Int./Div.	J	T					
114. XTRACKERS USD HIGH YIELD CORPORATE BOND ETF (HYLB)	A	Dividend			Sold	07/19/23	J		
115. ISHARES TR CORE MSCI EAF ETF (IEFA)	D	Dividend	M	T					
116. SCHWAB SHORT-TERM US TREASURY ETF (SCHO)	C	Dividend	K	T					
117. SPDR PORTFOLIO LONG TERM (SPTL)	A	Dividend	J	T	Buy	07/21/23	J		
118. ISHARES INC CORE MSCI EMERGING MKTS ETF EXECUTED 100% (IEMG)	D	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

Name of Person Reporting	Date of Report
Nichols, Carl J.	04/15/2024

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)	
119. ISHARES 20+ YEAR TREASURY BOND ETF (TLT)	A	Dividend	K	T					
120. ISHARES US TREASURY BOND ETF (GOVT)	B	Distribution	M	T					
121. LORD ABBETT SHORT DURATION INCOME FD CL F FUND (LLDYX)	A	Dividend	K	T					
122. ISHARES IBOXX $ INVT GRADE CORP BD (LQD)	A	Interest			Sold	07/19/23	K		
123. MFS VALUE FD CL I FUND SUBJECT TO RED FEE. (MEIIX)	B	Dividend	L	T					
124. ISHARES MBS ETF (MBB)	A	Dividend	J	T					
125. INVESCO DEVELOPING MARKETS (ODVYX)	A	Dividend	K	T					
126. VANGUARD SMALL CAP GROWTH ETF PER ADVISORY AGREEMENT (VBK)	A	Dividend	L	T					
127. VANGUARD SMALL CAP VALUE (VBR)	A	Dividend	L	T					
128. VANGUARD TOTAL INTERNATL BOND (BNDX)	C	Dividend	M	T					
129. VANGUARD SCOTTSDALE FKA INTRM-TERM CORPORATE BOND EXECUTED 100% (VCIT)	A	Dividend	J	T					
130. VANGUARD SHORT-TERM CORPORATE BOND EXECUTED 100% (VCSH)	A	Dividend	J	T					
131. VANGUARD VALUE ETF (VTV)	D	Dividend	O	T					
132. VANGUARD MORTGAGE BACKED SEC (VMBS)	A	Dividend	M	T					
133. VANGUARD GROWTH ETF (VUG)	B	Dividend	O	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		

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

Name of Person Reporting	Date of Report
Nichols, Carl J.	04/15/2024

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/ Carl J. Nichols

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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