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
O'Toole, George A.	U.S. District Court	05/13/2022
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**
District Judge (Senior)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
John Joseph Moakley United States Courthouse 1 Courthouse Way, Suite 7-130 Boston, MA 02210		

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	Trust #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.	2021	Contract employee, Massachusetts Department of Public Health
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.	George Mason University Law & Economics Center	3/14/2021 to 3/20/2021	Naples, Florida	Educational seminar	Travel, lodging, and meals
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
O'Toole, George A.	05/13/2022

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. 10X Genomics		None	J	T	Buy	10/06/21	J		
2.					Buy (add'l)	11/10/21	J		
3.					Buy (add'l)	11/17/21	J		
4. Abbott Labs	A	Dividend	K	T	Buy (add'l)	02/18/21	J		
5.					Buy (add'l)	09/14/21	J		
6.					Buy (add'l)	9/15/21	J		
7.					Sold (part)	04/26/21	J	A	
8. Abbvie	A	Dividend	J	T	Sold (part)	01/12/21	J	A	
9. Accenture PLC Ireland Cl A	A	Dividend	K	T	Sold (part)	04/26/21	J	A	
10.					Sold (part)	08/05/21	J	C	
11. Adobe Systems		None	K	T	Sold (part)	04/26/21	J	B	
12.					Sold (part)	09/14/21	J	B	
13.					Sold (part)	09/30/21	J	B	
14. Air Prodoucts & Chemicals	A	Dividend	J	T	Buy (add'l)	02/01/21	J		
15.					Buy (add'l)	12/06/21	J		
16.			J		Sold (part)	04/26/21	J	A	
17. Airbnb		None	J	T	Buy	08/12/21	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
	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.					Buy (add'l)	08/13/21	J		
19. Align Technology		None	J	T	Sold (part)	03/03/21	J	B	
20.					Sold (part)	03/30/21	J	B	
21. Alphabet Inc. Cl A		None	J	T	Sold (part)	04/26/21	J	B	
22. Alphabet Inc. Cl C		None	K	T	Sold (part)	02/23/21	J	C	
23.					Sold (part)	04/26/21	J	C	
24. Altria Group	A	Dividend	J	T	Buy (add'l)	02/01/21	J		
25.					Sold (part)	04/26/21	J	A	
26. Amazon		None	K	T	Buy	02/17/21	J		
27.					Buy (add'l)	09/30/21	J		
28.					Buy (add'l)	11/09/21	J		
29. AMC Networks		None	J	T	Sold (part)	01/12/21	J	A	
30. American Cap World Gr & Inc F2	A	Dividend	J	T					
31. American Express	A	Dividend	J	T					
32. Anthem Inc.	A	Dividend	J	T					
33. Apple	A	Dividend	K	T	Sold (part)	04/26/21	J	A	
34. AT&T	A	Dividend	J	T	Sold (part)	12/14/21	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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35. Autodesk Inc.		None	J	T	Sold (part)	01/12/21	J	A	
36.					Sold (part)	01/14/21	J	A	
37. Bank of America deposit accounts	A	Interest	J	T					
38. Baxter Intl	A	Dividend	J	T	Buy	02/23/21	J		
39.					Buy (add'l)	02/25/21	J		
40.					Buy (add'l)	02/26/21	J		
41.					Buy (add'l)	08/26/21	J		
42. Berkshire Hathaway Cl B		None	J	T	Sold (part)	04/26/21	J	A	
43.					Sold (part)	06/24/21	J	A	
44.					Sold (part)	07/27/21	J	A	
45. Biogen		None	J	T	Buy (add'l)	02/01/21	J		
46.					Sold (part)	04/26/21	J		
47. Blackrock Inc.	A	Dividend	J	T					
48. Blackrock Low Dur Bd Inv Inst	B	Dividend	L	T	Buy (add'l)	02/18/21	J		
49.					Buy (add'l)	06/25/21	J		
50.					Buy (add'l)	09/17/21	J		
51.					Buy (add'l)	12/16/21	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	
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52.					Buy (add'l)	12/23/21	J		
53. Blackstone Alt Multi Strat Inst		None	K	T	Buy (add'l)	08/09/21	J		
54.					Buy (add'l)	10/04/21	J		
55.					Buy (add'l)	12/15/21	J		
56.					Buy (add'l)	12/27/21	J		
57. Broadcom	A	Dividend	J	T	Buy (add'l)	04/22/21	J		
58.					Buy (add'l)	06/10/21	J		
59.					Buy (add'l)	08/26/21	J		
60. Calamos Market Neutral Inc I	A	Dividend	M	T	Buy (add'l)	02/18/21	J		
61.					Buy (add'l)	06/25/21	J		
62.					Buy (add'l)	10/04/21	J		
63.					Buy (add'l)	12/23/21	J		
64. Cerence Inc.		None	J	T	Sold (part)	01/12/21	J	A	
65.					Buy (add'l)	02/01/21	J		
66. Charles River Labs	A	Dividend	J	T	Buy	10/06/21	J		
67.					Buy (add'l)	11/05/21	J		
68. Charles Schwab New	A	Dividend	J	T					

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69. Chevron common	A	Dividend	J	T	Buy (add'l)	02/01/21	J		
70.					Sold (part)	04/26/21	J	A	
71. Chubb Ltd	A	Dividend	J	T					
72. Cincinnati Financial Ohio	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
73. Cisco Systems	A	Dividend	J	T	Sold (part)	01/12/21	J	A	
74.					Sold (part)	08/26/21	J	A	
75. Citrix Systems Inc.	A	Dividend	J	T	Buy (add'l)	02/01/21	J		
76.					Sold (part)	02/01/21	J		
77.					Sold (part)	08/04/21	J	A	
78. CME Group	A	Dividend			Sold	12/14/21	J	A	
79. Coca Cola Co.	A	Dividend			Sold (part)	06/24/21	J	A	
80.					Sold	07/27/21	J	A	
81. Cohen & Steers Real Estate Securities (CSDIX)	A	Dividend	K	T					
82. Cogate Palmolive	A	Dividend			Sold (part)	09/15/21	J	A	
83.					Sold	09/16/21	J		
84. Comcasst (New) Cl A	A	Dividend	K	T	Sold (part)	04/26/21	J	A	
85. Cree Research									See Part VIII, note 2.

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

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86. Crowdstrike Holdings		None	J	T	Buy	11/16/21	J		
87.					Buy (add'l)	11/23/21	J		
88.					Buy (add'l)	12/02/21	J		
89.					Buy (add'l)	12/08/21	J		
90.					Buy (add'l)	12/15/21	J		
91. Crown Castle Intl Corp	A	Dividend	J	T	Buy (add'l)	04/26/21	J		
92.					Sold (part)	12/06/21	J	A	
93. CVS Health Corp	A	Dividend	K	T					
94. CyrusOne, Inc.	A	Dividend			Sold	08/27/21	J	A	
95. Diageo ADR	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
96. Docusign		None	J	T	Buy	03/15/21	J		
97.					Buy (add'l)	05/07/21	J		
98.					Buy (add'l)	08/26/21	J		
99.					Buy (add'l)	09/15/21	J		
100.					Buy (add'l)	12/08/21	J		
101.					Buy (add'l)	12/15/21	J		
102.					Buy (add'l)	12/22/21	J		

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103.					Buy (add'l)	12/23/21	J		
104. Dolby Cl A	A	Dividend	J	T	Sold (part)	01/12/21	J	A	
105. Dollar General Corp.		None			Sold (part)	01/12/21	J	A	
106.					Sold	02/03/21	J	C	
107. Dominion Energy	A	Dividend	J	T	Buy (add'l)	02/01/21	J		See Part VIII, note 3.
108.					Buy (add'l)	03/08/21	J		
109.					Sold (part)	04/26/21	J	A	
110. Duke Realty	A	Dividend	J	T	Buy (add'l)	08/26/21	J		
111.					Buy (add'l)	08/27/21	J		
112.					Buy (add'l)	09/29/21	J		
113. Etsy Inc		None	J	T	Buy	10/12/21	J		
114.					Buy (add'l)	11/04/21	J		
115.					Buy (add'l)	12/08/21	J		
116.					Buy (add'l)	12/15/21	J		
117. Exxon Mobile common	A	Dividend	J	T					
118. Facebook Cl A							J		See Part VIII, note 4.
119. Fastenal	A	Dividend	J	T	Sold (part)	04/26/21	J	A	

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	
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Name of Person Reporting	Date of Report
O'Toole, George A.	05/13/2022

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. Fidelity National Information Services	A	Dividend	J	T					
121. FireEye		None			Sold	11/23/21	J	A	
122. Fluor Corp									See Part VIII, note 5.
123. Franklin Resources, Inc.	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
124. Freeport-McMoran	A	Dividend	J	T	Sold (part)	01/12/21	J	B	
125. Gartner Inc.		None	J	T	Sold (part)	01/12/21	J	A	
126.				T	Sold (part)	04/07/21	J	A	
127. Guardant Health		None	J	T	Sold (part)	01/12/21	J	A	
128.					Sold (part)	04/26/21	J	A	
129.					Buy (add'l)	05/07/21	J		
130. Harding Loevner Intl Equity	B	Dividend	N	T	Sold (part)	01/12/21	J	B	
131.					Sold (part)	09/14/21	J	B	
132. Honeywell	A	Dividend	J	T	Buy (add'l)	09/10/21	J		
133. Hubspot Inc		None	J	T	Buy	09/16/21	J		
134.					Buy (add'l)	11/03/21	J		
135.					Buy (add'l)	12/15/21	J		
136. Illumina Inc.		None	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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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.)*

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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)	
137. Immunogen		None	J	T	Sold (part)	01/12/21	J	A	
138. Intel	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
139. International Flavors and Fragrances	A	Dividend	J	T					
140. Intuitive Surgical		None	J	T					
141. Invesco Premier Inst	A	Dividend	J	T	Buy (add'l)	08/06/21	J		
142.					Buy (add'l)	10/04/21	J		
143.					Buy (add'l)	12/15/21	J		
144.					Buy (add'l)	12/27/21	J		
145. Ionis Pharmaceuticals		None	J	T	Buy (add'l)	02/01/21	J		
146.					Sold (part)	04/26/21	J	A	
147. IQ Hedge Multi-Strat Tracker									See Part VIII, note 6.
148. iShares Core S&P US Growth		None			Sold	02/01/21	J	A	
149. iShares Core S&P 500 ETF		None			Sold	02/01/21	J	A	
150. Johnson & Johnson common	A	Dividend	K	T	Sold (part)	04/26/21	J	A	
151. Johnson Controls	A	Dividend	J	T	Sold (part)	01/12/21	J	A	
152. JP Morgan Chase & Co.	A	Dividend	J	T	Buy (add'l)	12/14/21	J		
153. Kinder Morgan	A	Dividend							See Part VIII, note 7

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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	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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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.)*

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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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154. L-3 Technologies	A	Dividend	J	T	Buy (add'l)	02/01/21	J		
155.					Sold (part)	04/26/21	J	A	
156. Linde PLC	A	Dividend	J	T					
157. Lockheed Martin	A	Dividend	J	T					
158. Lord Abbett Sht Duration Inc (LDLFX)	B	Dividend	K	T	Buy (add'l)	08/06/21	J		
159.					Buy (add'l)	10/04/21	J		
160.					Buy (add'l)	12/15/21	J		
161.					Buy (add'l)	12/27/21	J		
162. Lowes Companies	A	Dividend	K	T	Sold (part)	02/23/21	J	A	
163.					Sold (part)	04/26/21	J	A	
164. Lyft		None	J	T	Buy	05/28/21	J		
165.					Buy (add'l)	06/14/21	J		
166.					Buy (add'l)	11/17/21	J		
167.					Buy (add'l)	11/18/21	J		
168. Manulife Financial common	A	Dividend	K	T					
169. Marsh & McLennan	A	Dividend	J	T					
170. Mastercaard , Inc. Cl A	A	Dividend	K	T	Sold (part)	01/12/21	J	A	

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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	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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171. Match Group		None	J	T	Buy	06/25/21	J		
172.					Buy (add'l)	07/19/21	J		
173.					Buy (add'l)	08/04/21	J		
174.					Buy (add'l)	08/10/21	J		
175.					Buy (add'l)	11/03/21	J		
176.					Buy (add'l)	12/15/21	J		
177. McDonalds Corp	A	Dividend	J	T					
178. Merger Fund	A	Dividend	J	T					
179. Medtronic	A	Dividend	J	T	Sold (part)	03/02/21	J	A	
180.					Sold (part)	04/26/21	J	A	
181.					Buy (add'l)	12/14/21	J		
182. Merck & Co.	A	Dividend	J	T	Sold (part)	02/25/21	J		
183.					Sold (part)	04/26/21	J	A	
184. Meta Platforms Cl A (formerly Facebook)		None	K	T	Sold (part)	01/12/21	J	A	
185.					Sold (part)	09/14/21	J	A	
186.					Sold (part)	11/09/21	J	A	
187. Metropolitan West Tot Ret Bd I (MWTIX)	B	Dividend	M	T	Buy (add'l)	02/18/21	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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	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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188.					Buy (add'l)	06/25/21	J		
189.					Buy (add'l)	08/06/21	J		
190.					Buy (add'l)	09/17/21	J		
191.					Buy (add'l)	10/04/21	J		
192.					Buy (add'l)	12/15/21	J		
193.					Buy (add'l)	12/16/21	J		
194.					Buy (add'l)	12/23/21	J		
195.					Buy (add'l)	12/27/21	J		
196. Microsoft common	A	Dividend	K	T	Sold (part)	04/26/21	J	A	
197.					Sold (part)	09/14/21	J	A	
198.					Sold (part)	09/30/21	J	A	
199. Mondelez Intl Inc.	A	Dividend	J	T					
200. Morgan Stanley Bank cash/MM account	A	Interest	J	T					
201. Motorola Solutions	A	Dividend	J	T					
202. MSCI Inc.	A	Dividend	J	T	Sold (part)	01/14/21	J	B	
203. NOV Inc (formerly National Oilwell Varco)	A	Dividend			Sold (part)	01/12/21	J	A	
204.					Sold (part)	04/26/21	J	A	

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205.					Sold	06/25/21	J		
206. Nestle Spon ADR	A	Dividend	J	T	Sold (part)	01/12/21	J	A	
207. Netflix		None	J	T	Buy	02/25/21	J		
208.					Buy (add'l)	03/03/21	J		
209. Nextera Energy	A	Dividend	J	T	Sold (part)	12/14/21	J	B	
210. Nike Inc. B	A	Dividend	J	T	Sold (part)	11/12/21	J	A	
211. Nintendo	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
212. Norfolk Southern	A	Dividend	J	T	Sold (part)	01/12/21	J	A	
213. Nuance Communications Inc.		None	J	T	Sold (part)	01/12/21	J	B	
214.					Buy (add'l)	02/01/21	J		
215. Nucor Corp	A	Dividend			Sold (part)	04/26/21	J	A	
216.					Sold (part)	08/05/21	J	A	
217.					Sold (part)	08/06/21	J	A	
218.					Sold (part)	08/09/21	J	A	
219.					Sold (part)	08/11/21	J	A	
220.					Sold	08/25/21	J	A	
221. Nuveen Santa Barbara Div Gr I	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
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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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222. Packaging Corp	A	Dividend	J	T					
223. Paychex	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
224. PayPal Holdings		None	J	T	Sold (part)	02/23/21	J	B	
225. Pentair	A	Dividend	J	T	Sold (part)	01/12/21	J	A	
226.					Sold (part)	04/26/21	J	A	
227. Pepsico common	A	Dividend	J	T	Sold (part)	12/10/21	J	A	
228. Pfizer Inc.	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
229. PGIM Short-term Corp.Bond (PIFZX)	A	Dividend	J	T	Buy (add'l)	09/17/21	J		
230.					Buy (add'l)	12/16/21	J		
231. PGIM Total Return (PDBAX)	B	Dividend	M	T	Buy (add'l)	08/06/21	J		See Part VIII, note 8
232.					Buy (add'l)	10/04/21	J		
233.					Buy (add'l)	12/15/21	J		
234.					Buy (add'l)	12/27/21	J		
235. Philip Morris	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
236. Phillips 66	A	Dividend	J	T					
237. Principal Mid Cap (PMCPX)	B	Distribution	L	T					
238. Procter & Gamble common	A	Dividend	J	T					

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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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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)	
239. Progressive Corp Ohio	A	Dividend	J	T	Buy	06/25/21	J		
240.					Buy (add'l)	06/28/21	J		
241. Qurate Retail Group	A	Dividend			Sold (part)	01/12/21	J	A	
242.					Sold	04/26/21	J	A	
243. Regeneron Pharmaceuticals		None			Sold (part)	02/12/21	J	A	
244.					Sold (part)	02/16/21	J	A	
245.					Sold	02/17/21	J		
246. Salesforce.com		None	K	T	Sold (part)	01/12/21	J	A	
247.					Buy (add'l)	01/14/21	J		
248.					Sold (part)	04/26/21	J	A	
249. Seagate TechnologyPLC	A	Dividend	J	T	Sold (part)	01/27/21	J	A	
250. ServiceNow Inc.		None	J	T	Sold (part)	04/26/21	J	A	
251.					Sold (part)	07/29/21	J	A	
252. Starbucks Corp	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
253.					Sold (part)	07/30/21	J	A	
254. Stericycle,Inc. common		None	J	T					
255. Target Corp	A	Dividend	J	T	Sold (part)	04/26/21	J	A	

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
O'Toole, George A.	05/13/2022

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.)*

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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)	
256. TE Connectivity	A	Dividend	J	T	Sold (part)	01/12/21	J	A	
257. TJX Cos		None	J	T	Buy	02/23/21	J		
258.					Buy (add'l)	03/02/21	J		
259.					Buy (add'l)	09/10/21	J		
260. Trane Technologies (formerly named Ingersoll-Rand)	A	Dividend	J	T	Sold (part)	02/23/21	J	A	
261. Texas Instruments	A	Dividend	K	T	Sold (part)	04/26/21	J	A	
262. Twitter Inc.		None	J	T	Sold (part)	01/12/21	J	A	
263. Union Pacific common	A	Dividend	J	T					
264. UnitedHealth Group	A	Dividend	K	T	Sold (part)	03/02/21	J	A	
265.					Sold (part)	04/26/21	J	A	
266. United Parcel Service	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
267. Verizon Communications common	A	Dividend	J	T	Sold (part)	04/26/21	J	A	
268. Vertex Pharmaceuticals		None	J	T	Buy (add'l)	02/01/21	J		
269.					Buy (add'l)	02/22/21	J		
270.					Sold (part)	04/26/21	J		
271. Virtus Insight Emrg Mkts (HIEMX)	B	Distribution	M	T	Buy (add'l)	08/06/21	J		
272.					Buy (add'l)	10/04/21	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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	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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273.					Buy (add'l)	12/15/21	J		
274.					Buy (add'l)	12/27/21	J		
275. Visa Inc. Cl A	A	Dividend	K	T	Sold (part)	01/12/21	J	A	
276. Walt Disney Co Holding Co									See Part VIII, note 9.
277. Walmart Inc.		None	J	T	Buy	12/14/21	J		
278. WEC Energy Group Inc.	A	Dividend	J	T	Buy (add'l)	12/15/21	J		
279. Wells Fargo & Co New									See Part VIII, note 10.
280. Wells Fargo Muni Bond Fund (WMBIX)	C	Dividend			Sold	04/26/21	K	D	
281. Western Digital Corp		None	J	T	Sold (part)	04/26/21	J	B	
282. Wolfspeed,, Inc		None	J	T					
283. Zoetis Inc. Cl A	A	Dividend	J	T	Sold (part)	01/12/21	J	A	
284.					Sold (part)	08/05/21	J	A	

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

1. The trust identified in Part I is a trust. All the assets held in the trust are reported individually in Part VII but are not specifically identified in that Part to the trust.

2. The asset reported as Cree Research changed its name to Wolfspeed Inc, and it is reported this year under the new name.

3. Dominion Energy was formerly known as, and reported as, Dominion Resources.

4. Facebook is renamed as Meta Platforms and reported under that name.

5. Fluor Corp. was reported last year as "sold in part." That was an error; it was entirely sold on January 2, 2020 at value code J. There was no gain.

6. Similarly the asset IQ Hedge Multi Strat Tracker was "sold" and not "sold in part" on January 2, 2020. See last year's report at Part VII, line 195. The proceeds were in value code K and gain code B..

7. Kinder Morgan interest was "sold," not "sold in part" as of 5/4/2020 in value code J with no gain..

8. This asset, PDBAX, was inadvertantly omitted from last year's report because of the similariity of the name to a reported asset, PIFZX. The Total Return fund asset was acquired 1/2/2020 at a value of L and earned dividend income in 2020 in category B.

9. Walt Disney Co. was sold 11/20/2020 with value code J and gain A. It should have been listed in the previous report as "sold" rather than "sold in part."

10. Similarly, Wells Fargo was disposed of 9//30/2020 .Line 364 should have been denoted "sold" rather than "sold in part."

Name of Person Reporting	Date of Report
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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/ George A. O'Toole

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
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