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
O'Toole, George A.	U.S. District Court	05/22/2023
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**
District Judge (Senior)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
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.	2022	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.	James Wilson Institute	May 6-7, 2022	Alexandria Virginia	Educational seminar	Airfare and lodging
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.	05/22/2023

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. 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. 10X Genomics		None	J	T	Buy (add'l)	07/20/22	J		
2.					Buy (add'l)	11/28/22	J		
3. Abbott Labs	A	Dividend	J	T	Sold (part)	03/08/22	J	A	
4.					Sold (part)	03/28/22	J	A	
5.					Sold (part)	05/16/22	J	A	
6.					Sold (part)	07/18/22	J	A	
7. Abbvie	A	Dividend	J	T	Buy (add'l)	09/12/22	J		
8.					Sold (part)	02/24/22	J	A	
9.					Sold (part)	03/08/22	J	A	
10.					Sold (part)	08/04/22	J	A	
11. Accenture PLC Ireland Cl A	A	Dividend	J	T	Sold (part)	02/08/22	J	A	
12.					Sold (part)	07/18/22	J	A	
13. Adobe Systems		None	K	T	Sold (part)	03/28/22	J	A	
14. Air Prodoucts & Chemicals	A	Dividend	J	T	Buy (add'l)	08/19/22	J		
15.					Sold (part)	03/08/22	J		
16.			J		Sold (part)	03/28/22	J	A	
17.					Sold (part)	07/18/22	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

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)	
18. Airbnb		None	J	T	Buy (add'l)	01/11/22	J		
19.					Buy (add'l)	01/12/22	J		
20.					Buy (add'l)	04/25/22	J		
21.					Buy (add'l)	05/11/22	J		
22.					Buy (add'l)	05/18/22	J		
23.					Buy (add'l)	07/14/22	J		
24.					Buy (add'l)	09/21/22	J		
25. Align Technology		None	J	T	Sold (part)	03/28/22	J	A	
26.					Sold (part)	07/18/22	J	A	
27. Alphabet Inc. Cl A		None	J	T	Buy (add'l)	12/22/22	J		
28. Alphabet Inc. Cl C		None	J	T	Buy (add'l)	12/22/22	J		
29.					Sold (part)	01/04/22	J	A	
30.					Sold (part)	02/10/22	J	C	
31.					Sold (part)	10/07/22	J	B	
32. Altria Group	A	Dividend	J	T	Sold (part)	01/21/22	J		
33.					Sold (part)	03/08/22	J	A	
34.					Sold (part)	03/28/22	J		

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35.					Sold (part)	07/18/22	J		
36. Amazon		None	K	T	Buy (add'l)	05/16/22	J		
37.					Buy (add'l)	08/19/22	J		
38.					Buy (add'l)	12/22/22	J		
39.					Sold (part)	07/19/22	J		
40.					Sold (part)	11/21/22	J		
41. AMC Networks		None	J	T	Sold (part)	03/08/22	J	A	
42.					Sold (part)	11/21/22	J		
43. American Cap World Gr & Inc F2	A	Dividend	J	T					
44. American Express	A	Dividend	J	T					
45. Apple	A	Dividend	K	T	Sold (part)	01/21/22	J	B	
46.					Sold (part)	02/24/22	J	A	
47.					Sold (part)	03/08/22	J	A	
48.					Sold (part)	03/28/22	J	B	
49.					Sold (part)	07/18/22	J	A	
50. AT&T	A	Dividend	J	T					
51. Autodesk Inc.		None	J	T	Buy (add'l)	01/12/22	J		

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52.					Buy (add'l)	12/22/22	J		
53.					Sold (part)	03/28/22	J		
54.					Sold (part)	07/18/22	J		
55.					Sold (part)	09/12/22	J		
56. Bank of America deposit accounts	A	Interest	J	T					
57. Baxter Intl	A	Dividend	J	T	Buy (add'l)	08/19/22	J		
58. Berkshire Hathaway Cl B		None	J	T	Sold (part)	01/21/22	J	A	
59.					Sold (part)	02/24/22	J	A	
60.					Sold (part)	03/08/22	J	A	
61.					Sold (part)	03/28/22	J	A	
62.					Sold (part)	04/01/22	J	A	
63.					Sold (part)	07/18/22	J	A	
64. Biogen		None	J	T	Buy (add'l)	08/19/22	J		
65.					Sold (part)	02/24/22	J		
66.					Sold (part)	03/08/22	J		
67.					Sold (part)	06/28/22	J		
68.					Sold (part)	07/18/22	J		

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69. Blackrock Inc.	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
70.					Sold (part)	02/24/22	J	A	
71.					Sold (part)	03/28/22	J	A	
72.					Sold (part)	07/18/22	J	A	
73. Blackrock Low Dur Bd Inv Inst	B	Dividend	L	T	Buy (add'l)	03/28/22	J		
74. Blackstone Alt Multi Strat Inst		None			Sold	03/28/22	J		
75. Broadcom	A	Dividend	J	T	Sold (part)	02/24/22	J	A	
76.					Sold (part)	03/08/22	J	A	
77.					Sold (part)	10/07/22	J	A	
78. Calamos Market Neutral Inc I	A	Dividend	L	T	Sold (part)	03/28/22	J	C	
79. Cerence Inc.		None			Sold	01/21/22	J		
80.					Sold (part)	03/08/22	J	A	
81.					Sold (part)	03/10/22	J		
82.					Sold	03/14/22	J		
83. Charles River Labs	A	Dividend	J	T	Buy (add'l)	04/19/22	J		
84.					Buy (add'l)	12/22/22	J		
85.					Sold (part)	11/21/22	J		

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86. Charles Schwab New	A	Dividend	J	T					
87. Chevron common	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
88.					Sold (part)	02/24/22	J	A	
89.					Sold (part)	03/08/22	J	A	
90.					Sold (part)	03/28/22	J	A	
91.					Sold (part)	04/01/22	J	A	
92.					Sold (part)	07/18/22	J	A	
93. Chubb Ltd	A	Dividend	J	T					
94. Cincinnati Financial Ohio	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
95.					Sold (part)	02/24/22	J	A	
96.					Sold (part)	03/08/22	J	A	
97.					Sold (part)	03/28/22	J	A	
98.					Sold (part)	07/18/22	J	A	
99. Cisco Systems	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
100.					Sold (part)	02/24/22	J	A	
101.					Sold (part)	03/08/22	J	A	
102.					Sold (part)	03/28/22	J	A	

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103.					Sold (part)	07/18/22	J	A	
104. Citrix Systems Inc.		None			Sold (part)	01/13/22	J	A	
105.					Sold	01/21/22	J	A	
106. Cohen & Steers Real Estate Securities (CSDIX)	A	Dividend	K	T	Buy (add'l)	12/22/22	J		
107. Comcasst (New) Cl A	A	Dividend	J	T	Sold (part)	01/21/22	J		
108.					Sold (part)	03/08/22	J	A	
109.					Sold (part)	03/28/22	J		
110.					Sold (part)	07/18/22	J	A	
111. Crowdstrike Holdings		None	J	T	Buy (add'l)	01/13/22	J		
112.					Buy (add'l)	01/27/22	J		
113.					Buy (add'l)	05/19/22	J		
114.					Buy (add'l)	07/08/22	J		
115.					Buy (add'l)	11/15/22	J		
116.					Sold (part)	07/18/22	J		
117. Crown Castle Intl Corp	A	Dividend	J	T	Sold (part)	03/08/22	J	A	
118.					Sold (part)	03/28/22	J	A	
119.					Sold (part)	07/18/22	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

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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 (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. CVS Health Corp	A	Dividend	J	T					
121. Diageo ADR	A	Dividend	J	T	Buy (add'l)	06/30/22	J		
122.					Buy (add'l)	07/18/22	J		
123.					Sold (part)	01/21/22	J	A	
124.					Sold (part)	02/24/22	J	A	
125.					Sold (part)	03/08/22	J	A	
126.					Sold (part)	03/24/22	J	A	
127. Docusign		None	J	T	Buy (add'l)	01/06/22	J		
128.					Buy (add'l)	03/24/22	J		
129.					Buy (add'l)	03/28/22	J		
130.					Buy (add'l)	07/18/22	J		
131.					Buy (add'l)	08/19/22	J		
132.					Buy (add'l)	12/22/22	J		
133.					Sold (part)	07/18/22	J		
134. Dolby Cl A	A	Dividend	J	T	Sold (part)	07/18/22	J	A	
135. Dominion Energy	A	Dividend	J	T	Buy (add'l)	12/22/22	J		
136.					Sold (part)	01/21/22	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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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)	
137.					Sold (part)	02/24/22	J	A	
138.					Sold (part)	03/08/22	J	A	
139.					Sold (part)	03/28/22	J	A	
140.					Sold (part)	07/18/22	J	A	
141.					Sold (part)	11/21/22	J		
142. Doximity	A	Dividend	J	T	Buy	03/08/22	J		
143.					Buy (add'l)	03/30/22	J		
144.					Buy (add'l)	05/18/22	J		
145.					Buy (add'l)	09/15/22	J		
146. Duke Realty		None			Sold	05/10/22	J	A	
147. Eaton Corp PLC	A	Dividend	J	T	Buy	02/16/22	J		
148. Elevance Health	A	Dividend	J	T					
149. Etsy Inc		None	J	T	Buy (add'l)	01/06/22	J		
150.					Buy (add'l)	01/20/22	J		
151.					Buy (add'l)	02/11/22	J		
152.					Buy (add'l)	03/07/22	J		
153.					Buy (add'l)	04/14/22	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		
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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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154.					Buy (add'l)	12/22/22	J		
155. Exxon Mobile common	A	Dividend	K	T					
156. Fastenal	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
157.					Sold (part)	02/24/22	J	A	
158.					Sold (part)	03/08/22	J	A	
159.					Sold (part)	03/28/22	J	A	
160.					Sold (part)	07/18/22	J	A	
161. Fidelity National Information Services	A	Dividend	J	T	Buy (add'l)	01/25/22	J		
162.					Buy (add'l)	02/28/22	J		
163.					Buy (add'l)	12/01/22	J		
164.					Sold (part)	03/08/22	J		
165.					Sold (part)	03/28/22	J		
166.					Sold (part)	07/18/22	J		
167. Freeport-McMoran	A	Dividend	J	T	Buy (add'l)	08/22/22	J		
168.					Buy (add'l)	12/22/22	J		
169.					Sold (part)	03/08/22	J	A	
170. Gartner Inc.		None	J	T	Sold (part)	03/08/22	J	A	

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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. 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)	
171.					Sold (part)	03/28/22	J	A	
172.					Sold (part)	04/01/22	J	A	
173. Guardant Health		None	J	T	Buy (add'l)	08/19/22	J		
174.					Sold (part)	07/19/22	J		
175. Harding Loevner Intl Equity	B	Dividend	M	T	Sold (part)	01/21/22	J	A	
176.					Sold (part)	02/24/22	J	A	
177.					Sold (part)	03/18/22	K	D	
178.					Sold (part)	03/28/22	J	C	
179.					Sold (part)	07/18/22	J	A	
180. Honeywell	A	Dividend	J	T					
181. Hubspot Inc	A	Dividend	J	T	Buy (add'l)	01/27/22	J		
182.					Buy (add'l)	06/09/22	J		
183.					Buy (add'l)	07/14/22	J		
184.					Buy (add'l)	12/22/22	J		
185.					Sold (part)	07/18/22	J	A	
186.					Sold (part)	11/21/22	J		
187. Illumina Inc.	A	Dividend	J	T	Buy (add'l)	08/19/22	J		

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188.					Buy (add'l)	09/30/22	J		
189.					Buy (add'l)	12/22/22	J		
190.					Sold (part)	02/24/22	J		
191.					Sold (part)	03/28/22	J	A	
192.					Sold (part)	07/19/22	J		
193. International Flavors and Fragrances	A	Dividend	J	T					
194. Intuitive Surgical		None			Sold (part)	03/08/22	J		
195.					Sold (part)	07/19/22	J		
196.					Sold	08/08/22	J		
197. Invesco Premier Inst	A	Dividend	K	T	Buy (add'l)	03/28/22	J		
198. Ionis Pharmaceuticals		None	J	T	Buy (add'l)	12/22/22	J		
199.					Sold (part)	02/24/22	J	A	
200.					Sold (part)	03/08/22	J	A	
201.					Sold (part)	07/18/22	J	A	
202. Johnson & Johnson common	A	Dividend	K	T	Sold (part)	01/21/22	J	A	
203.					Sold (part)	02/24/22	J	A	
204.					Sold (part)	03/08/22	J	A	

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205.					Sold (part)	03/28/22	J	A	
206.					Sold (part)	07/18/22	J	A	
207. Johnson Controls	A	Dividend	J	T	Sold (part)	01/25/22	J	A	
208.					Sold (part)	07/18/22	J	A	
209. JP Morgan Chase & Co.	A	Dividend	J	T					
210. MP Morgab Hedged Equity	A	Dividend	K	T	Buy	03/08/22	K		
211.					Buy (add'l)	12/02/22	J		
212. L-3 Technologies		None			Sold (part)	02/24/22	J	A	
213.					Sold	03/08/22	J	A	
214. Linde PLC	A	Dividend	J	T					
215. Lockheed Martin		None			Sold	02/14/22	J	A	
216. Lord Abbett Sht Duration Inc (LDLFX)	B	Dividend	M	T	Buy (add'l)	02/14/22	J		
217.					Buy (add'l)	03/28/22	L		
218. Lowes Companies	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
219.					Sold (part)	02/24/22	J	A	
220.					Sold (part)	03/08/22	J	A	
221.					Sold (part)	03/28/22	J	A	

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222.					Sold (part)	04/01/22	J	A	
223.					Sold (part)	07/18/22	J	A	
224. Lyft	A	Dividend	J	T	Buy (add'l)	04/14/22	J		
225.					Buy (add'l)	08/19/22	J		
226.					Buy (add'l)	12/22/22	J		
227. Manulife Financial common	A	Dividend	K	T					
228. Marsh & McLennan	A	Dividend	J	T					
229. Mastercaard , Inc. Cl A	A	Dividend	K	T	Buy (add'l)	02/24/22	J		
230.					Sold (part)	03/28/22	J	A	
231.					Sold (part)	09/29/22	J	A	
232. Match Group		None	J	T	Buy (add'l)	04/25/22	J		
233.					Buy (add'l)	08/19/22	J		
234.					Buy (add'l)	12/22/22	J		
235.					Sold (part)	07/19/22	J	A	
236.					Sold (part)	11/21/22	J	A	
237. McDonalds Corp	A	Dividend	J	T	Sold (part)	12/21/22	J	A	
238. Merger Fund	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
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239. Medtronic	A	Dividend			Sold (part)	01/19/22	J	A	
240.					Sold (part)	02/23/22	J	A	
241.					Sold (part)	03/23/22	J	A	
242.					Sold (part)	04/19/22	J	A	
243.					Sold	11/18/22	J	A	
244. Merck & Co.	A	Dividend	J	T	Sold (part)	01/19/22	J	A	
245.					Sold (part)	02/24/22	J	A	
246.					Sold (part)	03/08/22	J	A	
247.					Sold (part)	03/28/22	J	A	
248.					Sold (part)	07/18/22	J	A	
249. Meta Platforms Cl A (formerly Facebook)		None			Buy (add'l)	02/10/22	J		
250.					Sold (part)	03/08/22	J		
251.					Sold	10/28/22	J	A	
252. Metropolitan West Tot Ret Bd I (MWTIX)	B	Dividend	M	T	Buy (add'l)	01/26/22	J		
253.					Buy (add'l)	03/28/22	K		
254.					Buy (add'l)	12/15/22	J		
255. Microsoft common	A	Dividend	K	T	Buy (add'l)	12/22/22	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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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)	
256.					Sold (part)	02/24/22	J	A	
257.					Sold (part)	03/08/22	J	A	
258.					Sold (part)	03/28/22	J	B	
259.					Sold (part)	07/18/22	J	A	
260. Mondelez Intl Inc.	A	Dividend	J	T					
261. Morgan Stanley Bank cash/MM account	A	Interest	J	T					
262. Motorola Solutions	A	Dividend	J	T					
263. MSCI Inc.	A	Dividend			Sold (part)	01/21/22	J	A	
264.					Sold (part)	02/25/22	J	A	
265.					Sold (part)	03/03/22	J	A	
266.					Sold (part)	03/24/22	J	B	
267.					Sold (part)	03/28/22	J	A	
268.					Sold	07/18/22	J	A	
269. Nestle Spon ADR	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
270.					Sold (part)	02/24/22	J	A	
271.					Sold (part)	03/08/22	J	A	
272.					Sold (part)	03/28/22	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

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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 (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)	
273.					Sold (part)	07/18/22	J	A	
274. Netflix		None	J	T	Buy (add'l)	02/09/22	J		
275.					Buy (add'l)	08/08/22	J		
276.					Buy (add'l)	09/19/22	J		
277.					Buy (add'l)	12/22/22	J		
278.					Sold (part)	03/28/22	J		
279.					Sold (part)	07/19/22	J		
280. Neuberger Berman Lg Sh Inst		None	K	T	Buy	03/28/22	J		
281. Nextera Energy	A	Dividend	J	T	Sold (part)	05/10/22	J	A	
282. Nike Inc. B	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
283.					Sold (part)	03/28/22	J	A	
284.					Sold (part)	07/18/22	J	A	
285. Nintendo	A	Dividend	J	T	Buy (add'l)	08/19/22	J		
286.					Sold (part)	01/21/22	J		
287.					Sold (part)	03/28/22	J		
288.					Sold (part)	07/18/22	J		
289. Norfolk Southern	A	Dividend	J	T	Sold (part)	01/21/22	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

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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 (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)	
290.					Sold (part)	02/24/22	J	A	
291.					Sold (part)	03/08/22	J	A	
292.					Sold (part)	03/28/22	J	A	
293.					Sold (part)	04/01/22	J	A	
294.					Sold (part)	07/19/22	J	A	
295. Northrup Grumman		None	J	T	Buy	08/17/22	J		
296. Nuveen Santa Barbara Div Gr I	A	Dividend	J	T					
297. Packaging Corp	A	Dividend	J	T					
298. Paychex	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
299.					Sold (part)	02/24/22	J	A	
300.					Sold (part)	03/08/22	J	A	
301.					Sold (part)	03/28/22	J	A	
302.					Sold (part)	07/18/22	J	A	
303. PayPal Holdings		None	J	T	Sold (part)	03/28/22	J	A	
304.					Sold (part)	07/18/22	J		
305.					Buy (add'l)	02/25/22	J		
306.					Buy (add'l)	08/19/22	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

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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 (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)	
307.					Buy (add'l)	12/22/22	J		
308. Pentair	A	Dividend	J	T					
309. Pepsico common	A	Dividend	J	T					
310. Pfizer Inc.	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
311.					Sold (part)	02/24/22	J	A	
312.					Sold (part)	03/08/22	J	A	
313.					Sold (part)	03/28/22	J	A	
314.					Sold (part)	07/18/22	J	A	
315. PGIM Short-term Corp.Bond (PIFZX)	A	Dividend	J	T					
316. PGIM Total Return (PDBAX)	B	Dividend	L	T	Buy (add'l)	12/22/22	J		
317. Philip Morris	A	Dividend	J	T	Sold (part)	01/21/22	J		
318.					Sold (part)	02/24/22	J	A	
319.					Sold (part)	03/08/22	J	A	
320.					Sold (part)	03/24/22	J	A	
321.					Sold (part)	07/18/22	J	A	
322. Phillips 66	A	Dividend	J	T					
323. Principal Mid Cap (PMCPX)	A	Dividend	K	T	Sold (part)	03/28/22	L	E	

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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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. 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)	
324. Principal Real Est Sec Inst	A	Dividend	J	T	Buy	03/28/22	K		
325.					Buy (add'l)	12/15/22	J		
326. Procter & Gamble common	A	Dividend	K	T					
327. Progressive Corp Ohio	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
328.					Sold (part)	02/24/22	J	A	
329.					Sold (part)	03/08/22	J	A	
330.					Sold (part)	03/28/22	J	A	
331.					Sold (part)	07/18/22	J	A	
332. prologis	A	Dividend	J	T	Buy	09/21/22	J		
333.					Buy (add'l)	09/22/22	J		
334.					Sold (part)	10/03/22	J	A	
335. Salesforce.com		None	J	T	Buy (add'l)	09/28/22	J		
336.					Buy (add'l)	12/22/22	J		
337.					Sold (part)	01/21/22	J	A	
338.					Sold (part)	03/08/22	J	A	
339.					Sold (part)	03/28/22	J	A	
340.					Sold (part)	07/18/22	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

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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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341.					Sold (part)	11/11/22	J		
342. Seagate TechnologyPLC	A	Dividend	J	T	Sold (part)	01/27/22	J	A	
343.					Sold (part)	07/18/22	J		
344. ServiceNow Inc.		None	J	T	Buy (add'l)	10/03/22	J		
345.					Buy (add'l)	12/22/22	J		
346.					Sold (part)	03/28/22	J	A	
347.					Sold (part)	07/18/22	J	A	
348. Snowflake		None	J	T	Buy	05/05/22	J		
349.					Buy (add'l)	05/11/22	J		
350.					Buy (add'l)	06/28/22	J		
351.					Buy (add'l)	07/14/22	J		
352.					Buy (add'l)	11/09/22	J		
353. Starbucks Corp	A	Dividend	J	T	Buy (add'l)	04/01/22	J		
354.					Sold (part)	01/12/22	J	A	
355.					Sold (part)	01/21/22	J	A	
356.					Sold (part)	02/18/22	J		
357. Stericycle,Inc. common		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

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358. Target Corp	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
359.					Sold (part)	02/24/22	J	A	
360.					Sold (part)	03/08/22	J	A	
361.					Sold (part)	07/18/22	J	A	
362. TE Connectivity	A	Dividend			Buy (add'l)	07/08/22	J		
363.					Buy (add'l)	07/13/22	J		
364.					Buy (add'l)	07/14/22	J		
365.					Sold (part)	02/24/22	J	A	
366.					Sold (part)	03/08/22	J	A	
367.					Sold	07/14/22	J	A	
368. Thermo Fischer		None	J	T	Buy	11/22/22	J		
369. TJX Cos	A	Dividend	J	T	Sold (part)	12/21/22	J	A	
370. Trane Technologies (formerly named Ingersoll-Rand)	A	Dividend	J	T					
371. Texas Instruments	A	Dividend	J	T					
372. Twitter Inc.		None	J	T	Sold (part)	04/14/22	J	A	
373.					Sold (part)	04/26/22	J	A	
374.					Sold (part)	07/11/22	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
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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 (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)	
375.					Sold (part)	07/18/22	J	A	
376.					Sold (part)	10/20/22	J	A	
377.					Sold (part)	10/28/22	J	A	
378. Union Pacific common	A	Dividend	J	T					
379. UnitedHealth Group	A	Dividend	K	T	Sold (part)	01/21/22	J	A	
380.					Sold (part)	02/24/22	J	A	
381.					Sold (part)	03/08/22	J	A	
382.					Sold (part)	03/28/22	J	A	
383.					Sold (part)	05/11/22	J	A	
384.					Sold (part)	07/18/22	J	A	
385. United Parcel Service	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
386.					Sold (part)	02/24/22	J	A	
387.					Sold (part)	03/08/22	J	A	
388.					Sold (part)	03/28/22	J	A	
389.					Sold (part)	07/18/22	J	A	
390. Unity Software		None			Buy	01/18/22	J		
391.					Buy (add'l)	01/27/22	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

Name of Person Reporting	Date of Report
O'Toole, George A.	05/22/2023

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. 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)	
392.					Sold	07/13/22	J		
393. Vanguard Utilities ETF	A	Dividend	L	T	Buy	03/28/22	L		
394. Verizon Communications common	A	Dividend	J	T	Buy (add'l)	02/28/22	J		
395.					Buy (add'l)	12/22/22	J		
396.					Sold (part)	01/21/22	J		
397.					Sold (part)	03/08/22	J		
398.					Sold (part)	03/28/22	J		
399.					Sold (part)	07/18/22	J		
400.					Sold (part)	11/21/22	J		
401. Vertex Pharmaceuticals		None	J	T	Sold (part)	02/24/22	J	A	
402.					Sold (part)	03/08/22	J	A	
403.					Sold (part)	07/08/22	J	A	
404.					Sold (part)	07/18/22	J	A	
405. Virtus Insight Emrg Mkts (HIEMX)		None			Sold	03/28/22	K		
406. Visa Inc. Cl A	A	Dividend	J	T	Sold (part)	01/21/22	J	A	
407.					Sold (part)	03/28/22	J	B	
408.					Sold (part)	07/18/22	J	A	

1. Income Gain Codes: (See Columns B1 and D4)
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C =$2,501 - $5,000
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E =$15,001 - $50,000
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J =$15,000 or less
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M =$100,001 - $250,000
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O =$500,001 - $1,000,000
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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)	
409.					Sold (part)	09/29/22	J	B	
410. Walmart Inc.		None	J	T	Buy (add'l)	03/03/22	J		
411. Warner Bros Disccovery		None	J	T	Buy	08/19/22	J		
412. WEC Energy Group Inc.	A	Dividend	J	T					
413. Western Digital Corp		None	J	T	Sold (part)	01/06/22	J	A	
414.					Sold (part)	07/18/22	J	A	
415.					Sold (part)	11/10/22	J		
416.					Sold (part)	11/18/22	J		
417.					Sold (part)	12/02/22	J		
418. Wolfspeed,, Inc		None	J	T	Buy (add'l)	02/11/22	J		
419.					Buy (add'l)	07/12/22	J		
420.					Sold (part)	03/08/22	J		
421.					Sold (part)	07/18/22	J		
422. Zoetis Inc. Cl A	A	Dividend	J	T	Buy (add'l)	12/22/22	J		
423.					Sold (part)	02/08/22	J	A	
424.					Sold (part)	03/08/22	J	A	
425.					Sold (part)	03/28/22	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
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426.					Sold (part)	03/30/22	J	A	
427.					Sold (part)	07/18/22	J	A	

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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. Last year's report indicated AT&T stock had been "sold in part." The values are the same but the description should have been "sold."

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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/ 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. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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Washington, D.C. 20544