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
Russell III, George L.	United States District Court for the District of Maryland	05/08/2024
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**
United States District Judge Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
101 West Lombard Street Baltimore Maryland 21201		

IMPORTANT NOTES: ***The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.***

I. POSITIONS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Trustee	The Historical Society of the United States District Court for the District of Maryland
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.	2023	Self-employed attorney
2.	2023	University of Baltimore
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.	[redacted]	Tuition	K
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Russell III, George L.	05/08/2024

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. American Funds Washington Mutual Investment Funds	A	Dividend	J	T					
2. Constellation Energy	A	Dividend	K	T					
3. Excelon	A	Dividend	K	T	Sold (part)	04/14/23	K		
4. Brokerage Account #1 (H)									
5. -Apple Inc	B	Dividend	J	T					
6. - Edward Jones MNY MKT FUND retirement Shares	B	Dividend	J	T					
7. -Duke Energy Corp New	A	Dividend	J	T					
8. -Ishares Core S&P 500 ETF	A	Dividend	J	T	Sold (part)	08/10/23	J		
9. -Marathon Pete Corp.	A	Dividend	J	T					
10. -Microsoft Corp	B	Dividend	J	T					
11. -Nutrien Limited	A	Dividend	J	T					
12. -Pfizer Inc.	A	Dividend	J	T					
13. -Proctor and Gamble Co.	A	Dividend	J	T					
14. -Ratheon Technologies	A	Dividend	J	T					
15. -United Parcel Service	A	Dividend	J	T					
16. -Viatris	A	Dividend	J	T					
17. -Invesco Comstock R6	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
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
Russell III, George L.	05/08/2024

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)	
18. -JPM Emerging Market Emerging markets Equty A	A	Dividend	J	T					
19. -JP Morgan Core Bond A	A	Dividend	J	T	Sold (part)	03/17/23	J	A	
20. -JP Morgan Equity Income A	B	Dividend	J	T	Sold (part)	01/20/23	J	A	
21. -JP Morgan Growth Advantage A	A	Dividend	J	T	Sold (part)	01/20/23	J	A	
22.					Sold (part)	03/17/23	J	A	
23. -JP Morgan International Value A	A	Dividend	J	T					
24. -JP Morgan Large Cap Growth CL A	A	Dividend	J	T	Sold (part)	03/17/23	J	A	
25. -JP Morgan Large Cap Growth R6	B	Dividend	J	T	Sold (part)	01/20/23	J	A	
26. -JP Morgan Mid Cap Equity CL A	A	Dividend	J	T	Sold (part)	01/20/23	J	A	
27.					Sold (part)	03/17/23	J	A	
28. -JP Morgan Mid Cap Equity R6	A	Dividend	J	T					
29. -JP Morgan Short Duration Bond A	A	Dividend	J	T	Sold (part)	03/17/23	J	A	
30. -JP Morgan Small Cap Growth CL A	A	Dividend	J	T	Sold (part)	01/20/23	J	A	
31.					Sold (part)	03/17/23	J	A	
32. -JP Morgan Governent Bond CL A	A	Dividend	J	T	Sold (part)	03/17/23	J	A	
33. -JP Morgan Core Bond CL A	A	Dividend	J	T	Sold (part)	03/17/23	J	A	
34. -JP Value Advantage CL A	A	Dividend	J	T	Sold (part)	01/20/23	J	A	

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35.					Sold (part)	03/17/23	J	A	
36. -JP Morgan Equity Income CL A	A	Dividend	J	T	Sold (part)	03/17/23	J	A	
37. -JP Morgan Bond CL A	A	Dividend	J	T					
38. -JP Morgan International Equity CL A	A	Dividend	J	T	Sold (part)	03/17/23	J	A	
39. -JP Morgan International Value CL A	A	Dividend	J	T	Sold (part)	01/20/23	J	A	
40.	A	Dividend	J	T	Sold (part)	03/17/23	J	A	
41. -JP Morgan Samall Cap Growth CL A	A	Dividend	J	T	Sold (part)	01/20/23	J	A	
42. -JP Morgan Emerging Markets CL A	A	Dividend	J	T	Sold (part)	01/20/23	J	A	
43.					Sold (part)	03/17/23	J	A	
44. -Lord Abbett Total Return F3	A	Dividend	J	T					
45. -MFS Corporate Bond R 6	A	Dividend	J	T					
46. -MFS Total Return Bond R6	A	Dividend	J	T					
47. -TRP Blue Chip Growth 1	A	Dividend	J	T					
48. -FT INVT Grd Mult 10-20 YR #12	A	Dividend	J	T					
49. -Invesco Invt Grd Inc TR20+56	A	Dividend	J	T					
50. Brokerage Account #2 (H)									
51. -T Rowe Price MD Tx Free	A	Dividend	J	T					

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2. Value Codes (See Columns C1 and D3)
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52. -Permanent Portfolio FD PRPFX	A	Dividend	J	T					
53. -Vanguard Wellesley	A	Dividend	J	T					
54. -Global X FUNDS ETF	A	Dividend	J	T	Sold (part)	08/10/23	J	B	
55. -GLBL X LITH & BATT ETF	A	Dividend	J	T					
56. -MATERIALS SECTOR SPD ETF	A	Dividend	J	T					
57. -VANDGUARD HEALTH CARE ETF	A	Dividend	J	T	Sold (part)	08/10/23	J	A	
58. -VANGUARD WELLSLY INC ADM	A	Dividend	J	T	Sold (part)	08/09/23	J	A	
59. -SPDR S&P 500 TRUST ETF	A	Dividend	J	T	Sold (part)	08/10/23	J	A	
60. -VANDUARD DVD APPREC ETF	A	Dividend	J	T	Sold (part)	08/10/23	J	A	
61. -FIRST TR NASDAQ ETF	A	Dividend	K	T	Sold (part)	08/10/23	J	A	

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

The U.S. Disirict Court of Maryland Historical Society is a non-profit organization

Name of Person Reporting	Date of Report
Russell III, George L.	05/08/2024

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/ George L. Russell III

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