AO 10
Rev. 1/2021

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

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
Schmehl, Jeffrey L.	U. S. District Court, Eastern District of PA	5/14/2024
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 Court Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	1/1/2023 **to** 12/31/2023
7. Chambers or Office Address		
The Gateway Building 201 Penn Street, 5th Floor Reading, PA 19601		

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 pp. 9-13 of filing instructions.)*

☑ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.		
2.		
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions.)*

☐ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.	1998	Berks County Employee Retirement Plan-Member presently receiving benefits.
2.	2013	State Employee Retirement System-Member presently receiving benefits.
3.		

Name of Person Reporting	Date of Report
Schmehl, Jeffrey L.	5/14/2024

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions.)*

A. Filer's Non-Investment Income

☐ NONE *(No reportable non-investment income.)*

DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1. 2023	Berks County Employment Pension	$2,498.00
2. 2023	State Employee Retirement System Pension	$69,046.92
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 AND TYPE
1. 2023	[redacted]. Salary
2.	
3.	
4.	

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)

☑ NONE *(No reportable reimbursements.)*

SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.				
2.				
3.				
4.				
5.				

Name of Person Reporting	Date of Report
Schmehl, Jeffrey L.	5/14/2024

V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Schmehl, Jeffrey L.	5/14/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ 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)	D. (5) Identity of buyer/seller (if private transaction)
1. Mid Penn Bank, fromerly First Priority Bank, Cash Accounts	A	Int./Div.	M	T					
2. Federated Kaufmann Fund C	A	Int./Div.	K	T					
3. Federated Equity Income C	B	Int./Div.	K	T					
4. Federated Kaufmann Large Cap C	B	Int./Div.	K	T					
5. Federated Kaufmann Small Cap C	B	Int./Div.	L	T					
6. Jackson Black Rock Gobal	A	Int./Div.	L	T					
7. Jackson Agressive Growth	B	Int./Div.	M	T					
8. Jackson Growth	C	Int./Div.	M	T					
9. American Funds Growth Portfolio	C	Int./Div.	M	T					
10. Amazon	B	Int./Div.	L	T					
11. Apple	B	Int./Div.	K	T					
12. Tesla	A	Int./Div.	K	T					
13. Fannie Mae	A	Int./Div.	J	T					
14. Uber	A	Int./Div.	J	T					
15. Canopy Growth Corporation	A	Int./Div.	J	T					
16. Fuel Cell Energy Co.	A	Int./Div.	J	T					
17. BABA	A	Int./Div.	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
Schmehl, Jeffrey L.	5/14/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ 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)	D. (5) Identity of buyer/seller (if private transaction)
18. Zillo	A	Int./Div.	J	T					
19. Nikola Corp (Nkla)	A	Int./Div.	J	T					
20. Boeing	A	Int./Div.	J	T					
21. AADI Bioscience	A	Int./Div.	J	T					
22. Aclaris Therapeutics	A	Int./Div.	J	T					
23. New Millenium Investments(X) Comprised of below investments									
24. - Apple, Inc	A	Int./Div.	J	T					
25. - I Shares North American Resources , ETF	A	Int./Div.	J	T					
26. - JP Morgan Chase & Co.	A	Int./Div.	J	T					
27. - Powershares QQQ ETF	A	Int./Div.	J	T					
28. - Protor & Gamble Company	A	Int./Div.			Sold	11/22/23	J	A	
29. - Fannie Mae	A	Int./Div.	J	T					
30. - United Health Group Inc	A	Int./Div.	J	T					
31. - Amazon	A	Int./Div.	J	T					
32. - Google	A	Int./Div.	J	T					
33. - Johnson & Johnson	A	Int./Div.			Sold	11/22/23	J	A	
34. - AMGEN	A	Int./Div.	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
Schmehl, Jeffrey L.	5/14/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ 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)	D. (5) Identity of buyer/seller (if private transaction)
35. - ABBVie	A	Int./Div.	J	T					
36. - Microsoft	A	Int./Div.	J	T					
37. - NVIDIA Group	A	Int./Div.	J	T					
38. - Becton Dickinson	A	Int./Div.	J	T					
39. - Wal Mart	A	Int./Div.	J	T					
40. - Tesla	A	Int./Div.	J	T					
41. - Qcom	A	Int./Div.	J	T					
42. - Regenron	A	Int./Div.	J	T					
43. - ARPO	A	Int./Div.	J	T					
44. - PYPL	A	Int./Div.	J	T					
45. - Penn Gaming	A	Int./Div.			Sold	01/17/23	J	A	
46. - Occidental Petroleum	A	Int./Div.	J	T					
47. - Chevron Corp	A	Int./Div.			Sold	11/22/23	J	A	
48. - RTX	A	Int./Div.			Buy	02/21/23	J		
49. - Eli Lilly Co	A	Int./Div.			Buy	11/22/23	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; 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
Schmehl, Jeffrey L.	5/14/2024

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

Part VII. Investments and Trusts - Line 23 (heading) and Lines 24 through 49 are part of New Millenium Investments which is a small investment club that I am a part of. The individual stock/investments listings in #24 through #49 were either held by the club, sold by the club or bought by the club as listed for the year 2023. All individual funds and individual investments listed in the New Millenium Investements are signified with a dash (-) in front of said funds/stocks/ investments. The values indicated are the values of my pro-rata shares.

Name of Person Reporting	Date of Report
Schmehl, Jeffrey L.	5/14/2024

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. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Jeffrey L. Schmehl

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
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544