AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

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
Shelby, Robert J.	United States District Court, District of Utah	05/11/2025
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**
Chief United States District Judge - Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
United States District Court 351 South West Temple Salt Lake City, Utah 84101		

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

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

☑ NONE *(No reportable positions.)*

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

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements.)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

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

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

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

	DATE	SOURCE
1.	2024	Intrepid Group - Wages
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.	Bolch Judicial Insititute	3/20/24 - 4/02/24	Colombo, Sri Lanka	Training Sri Lanka Supreme Court and Court of Appeals Judges on Judicial Education	Transportation, Lodging, Meals
2.	Federal Bar Assoc., Utah Chapter	5/09/24 - 5/11/24	St. George, UT	Presenter at Federal Bar Assoc. Southern Utah Law Symposium	Transportation, Lodging, Meals
3.	Rodel Institute Judicial Fellowship	7/24/24 - 7/28/24	Sun Valley, ID	Participation in Judicial Cohort on Democracy, the Constitution, and the Rule of Law	Transportation, Lodging, Meals

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
Shelby, Robert J.	05/11/2025

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.	Mountain America Credit Union Accounts	A	Int./Div.	K	T					
2.	Utah Educational Savings Plan Inst. Index - S&P 500	B	Dividend	L	T	Distributed (part)	08/04/24	J		
3.						Distributed (part)	11/07/24	J		
4.	Retirement Account #1									
5.	-New York Life Fixed Annuity		None			Redeemed	04/10/24	K		
6.	-Raymond James Cash/Sweep Acct	A	Interest	K	T					
7.	-Growth Fund America CL F1 Fund	D	Dividend	M	T					
8.	-T Rowe Price New Horizons Fund	B	Distribution	L	T					
9.	-Dodge & Cox FDS Int'l Fund	B	Dividend	K	T					
10.	-Vanguard Dividend Growth Fund	C	Dividend	M	T					
11.	-Vanguard Index TR MidCap Admir	B	Dividend	L	T					
12.	-Baillie Gifford Int'n Growth	A	Dividend			Sold	02/21/24	K		
13.	-Met West Total Return Bond Fund	A	Dividend	K	T					
14.										
15.	-FIMM Gov't Portfolio MM Inst. CL	B	Interest	L	T	Buy (add'l)	12/19/24	K		
16.						Buy	05/03/24	J		
17.	-BMW North America CD	B	Interest	L	T	Buy	05/10/24	L		

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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☐ 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. -Morgan Stanley CD	B	Interest	L	T	Buy	05/07/24	L		
19. -Ally Bank	A	Interest	K	T	Buy	05/07/24	K		
20. -Citigroup Global Markets Holdings Inc. 5YR U.S. Equity Cont. Coupon	C	Interest			Redeemed	09/23/24	K		
21. -BofA Finance LLC 5YR U.S. Equity Cont. Coupon	B	Interest			Redeemed	10/25/24	K		
22. -BofA CD	B	Interest	K	T	Buy	02/29/24	K		
23. -BofA CD	A	Interest	K	T	Buy	05/03/24	K		
24. -JP Morgan Chase LLC 4YR Equity Cont. Note	A	Interest			Redeemed	01/29/24	K		
25. -JP Morgan Chase LLC 5YR Equity Cont. Note	A	Interest	K	T	Buy	02/28/24	K		
26. -United Fidelity Bank CD	B	Interest	K	T					
27. Retirement Account #2									
28.									
29. -Vanguard MidCap Index Fund	A	Dividend	L	T	Sold (part)	10/17/24	J		
30.					Sold (part)	05/06/24	J		
31. -Vanguard Dividend Growth Fund	B	Dividend	L	T	Sold (part)	10/17/24	J		
32.					Sold (part)	05/06/24	J		
33. -T.Rowe Price Blue Chip Growth Fund	B	Dividend	K	T	Sold (part)	10/17/24	J		
34.					Sold (part)	05/06/24	J		

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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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35. -MetWest Total Return Bond Fund	B	Dividend	L	T	Buy (add'l)	10/17/24	J		
36.					Buy (add'l)	05/06/24	J		
37. Inherited TIAA Retirement Acct. (X)		None	O	T					
38.									

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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part 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. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Robert J. Shelby

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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