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
Talwani, Indira	U.S. District Court, District of Massachusetts	08/13/2024
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**
U.S. District Judge (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
John J. Moakley U.S. Courthouse One Courthouse Way Boston, MA 02110		

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.	2023	Pyle Rome LLP - Salary
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.	Federal Judges Association	April 12-14, 2023	Denver, CO	Meeting	Transportation, meals, 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
Talwani, Indira	08/13/2024

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. Individual Assets (H)									
2. Citizens Bank (cash)	B	Interest	M	T					
3. Charles Schwab (cash)	A	Interest	K	T					
4. Account #1 (H)									
5. American Funds Dev. World Growth Fund (DWGAX)	A	Dividend	J	T					
6. American Funds Fundamental Investors Fund (ANCFX)	A	Dividend	K	T					
7. American Funds Growth Portfolio Fund (GWPAX)	C	Dividend	K	T					
8. American Funds High Income Trust Fund (AHITX)	A	Dividend	J	T					
9. American Funds Income Fund of America (AMECX)	A	Dividend	J	T					
10. American Funds Inter Bond Fund of America (AIBAX)	A	Dividend	J	T					
11. American Funds Investment Company of America Fund (AIVSX)	A	Dividend	J	T					
12. American Funds SMALLCAP World Fund (RSEBX)		None	J	T					
13. Account #2 (H)									
14. American Funds AMCAP A (AMCPX)	A	Dividend	J	T					
15. American Funds Balanced Fund A (ABALX)	A	Dividend	J	T					
16. American Funds Bond Fund of America A (ABNDX)	A	Dividend	J	T					
17. American Funds Capital Income Builder A (CAIBX)	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

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Talwani, Indira	08/13/2024

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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. American Funds High Income Trust A (AHITX)	A	Dividend	J	T					
19. American Funds Investment Co of America A (AIVSX)	A	Dividend	J	T					
20. American Funds American Mutual Cl A (AMRMX)	A	Dividend	J	T					
21. American Funds New Perspective Fund A (ANWPX)	A	Dividend	J	T					
22. American Funds New World Cl A (NEWFX)	A	Dividend	J	T					
23. American Funds Smallcap World A (SMCWX)		None	J	T					
24. Account #3 (H)									
25. Schwab Value Advantage M (SWVXX) (cash eq.)	A	Dividend	L	T					
26. AT&T Inc (T)	B	Dividend	K	T					
27. Abbvie Inc (ABBV)	C	Dividend	L	T					
28. Altria Group Inc (MO)	D	Dividend	L	T					
29. Amgen Inc (AMGN)	A	Dividend	K	T					
30. Bank Montreal Quebec (BMO)	B	Dividend	K	T					
31. BCE Inc (BCE)	C	Dividend	K	T					
32. BP PLC (BP)	B	Dividend	K	T					
33. Canon Inc (CAJPY)	A	Dividend	K	T					
34. CDN Imperial Bank (CM)	C	Dividend	L	T					

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35. Chevron Corp (CVX)	B	Dividend	K	T					
36. Dominion Energy (D)	B	Dividend	K	T					
37. Enbridge Inc (ENB)	D	Dividend	L	T					
38. IBM Corp (IBM)	A	Dividend	J	T					
39. Intel Corp (INTC)	A	Dividend	K	T					
40. International Paper (IP)	A	Dividend	J	T					
41. Lockheed Martin Corp (LMT)	B	Dividend	L	T					
42. Merck & Co (MRK)	B	Dividend	L	T					
43. Midcap Finl Investment (MFIC)	B	Dividend	K	T					
44. Northland Power Inc (NPIFF)	B	Dividend	K	T					
45. Novartis AG (NVS)	B	Dividend	K	T					
46. National Bank of Canada (NTIOF)	C	Dividend	L	T					
47. Pfizer Inc (PFE)	B	Dividend	K	T					
48. Russel Metals Inc (RUSMF)	A	Dividend	K	T					
49. Sandoz Group AG (SDZNY)		None	J	T					
50. Telus Corp (TU)	B	Dividend	K	T					
51. Toronto Dominion Banks (TD)	B	Dividend	K	T					

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52. Totalenergies SE (TTE)	B	Dividend	K	T					
53. Universal Corp (UVV)	B	Dividend	K	T					
54. Alliancebernstein Holdings LP (AB)	C	Dividend	K	T					
55. Account #4 (H)									
56. Schwab S&P 500 Index (SWPPX)	A	Dividend			Sold	12/22/23	K	B	
57. AT&T Inc (T)		None			Sold	12/26/23	K	B	
58. Bank Nova Scotia (BNS)		None			Sold	12/26/23	K	A	
59. BHP Group Ltd Spon (BHP)		None			Sold	12/26/23	L	D	
60. BP PLC (BP)	A	Dividend			Sold	12/26/23	K		
61. British American Tobacco Unspon (BTI)	B	Dividend			Sold	12/26/23	L		
62. Brookfield Infrastructure LP (BIP)	A	Int./Div.			Sold	12/26/23	K	A	
63. Deutsche Telekom AG (DTEGY)		None			Sold	12/26/23	L	C	
64. Emera Inc (EMRAF)		None			Sold	12/26/23	K		
65. Exxon Mobil Corp (XOM)	A	Dividend			Sold	12/26/23	K		
66. GSK PLC (GSK)	A	Dividend			Sold	12/26/23	L		
67. IBM Corp (IBM)	A	Dividend			Sold	12/26/23	L	C	
68. Iron Mountain Inc REIT (IRM)	A	Dividend			Sold	12/26/23	L	D	

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69.	Mercury Gen Corp (MCY)	A	Dividend			Sold	12/26/23	K	D	
70.	Northwest Bancshares (NWBI)		None			Sold	12/26/23	K	D	
71.	Philip Morris Intl (PM)	A	Dividend			Sold	12/26/23	K		
72.	Pinnacle West Cap (PNW)	A	Dividend			Sold	12/26/23	K		
73.	Rio Tinto PLC (RIO)		None			Sold	12/26/23	L	D	
74.	Sanofi SA (SNY)		None			Sold	12/26/23	K		
75.	Southern Co (SO)	A	Dividend			Sold	12/26/23	K		
76.	Totalenergies SE (TTE)		None			Sold	12/26/23	K	B	
77.	Verizon Communication (VZ)		None			Sold	12/26/23	K	C	
78.	Account #5 (H)									
79.	Charles Schwab Bank (cash)	A	Interest	K	T	Open	12/06/23	L		
80.	Schwab Value Advantage M (SWVXX) (cash eq.)	A	Dividend	L	T	Buy	12/06/23	L		
81.	Account #6 (H)									
82.	Charles Schwab Bank (cash)	A	Interest	L	T	Open	12/26/23	O		
83.	Charles Schwab US REIT (SCHH)		None	K	T	Buy	12/28/23	K		
84.	Schwab Fundamental Intl Large Company ETF (FNDF)		None	L	T	Buy	12/28/23	L		
85.	Schwab Fundamental US Large Company ETF (FNDX)		None	M	T	Buy	12/28/23	M		

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86.	Schwab Fundamental US Small Company ETF (FNDA)		None	M	T	Buy	12/28/23	M		
87.	Schwab International Equity ETF (SCHF)		None	L	T	Buy	12/28/23	L		
88.	Schwab US Large Cap ETF (SCHX)		None	M	T	Buy	12/28/23	M		
89.	Schwab US Small Cap ETF (SCHA)		None	L	T	Buy	12/28/23	L		
90.	Schwab US Tips ETF (SCHP)		None	K	T	Buy	12/28/23	K		
91.	Vanguard Muni Bond Tax Exempt (VTEB)		None	M	T	Buy	12/28/23	M		
92.	Account #7 (H)									
93.	Edward Jones Insured Bank Deposit (Cash)	A	Interest	M	T					
94.	Amazon.com Inc (AMZN) (X)		None	K	T					
95.	Nextera Energy Inc (NEE)	A	Dividend	K	T					
96.	Account #8 (H)									
97.	Charles Schwab Bank (cash)	A	Interest			Closed	09/18/23	J		
98.	Schwab Value Advantage Money Market Inv (SWVXX) (cash eq.)	A	Dividend			Sold	04/04/23	K		
99.	Account #9 (H)									
100.	Rental property #1, South Orleans, Massachusetts	E	Rent	P2	W					
101.	Federated Hermes Govt Obl (GOFXX) (cash eq.)	B	Interest	L	T	Sold (part)	01/11/23	J		
102.						Buy (add'l)	01/20/23	K		

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103.					Buy (add'l)	02/06/23	J		
104.					Sold (part)	02/08/23	J		
105.					Buy (add'l)	02/16/23	M		
106.					Sold (part)	02/17/23	M		
107.					Buy (add'l)	02/28/23	J		
108.					Sold (part)	03/13/23	J		
109.					Sold (part)	03/16/23	J		
110.					Sold (part)	03/22/23	J		
111.					Sold (part)	03/23/23	J		
112.					Buy (add'l)	03/31/23	J		
113.					Sold (part)	04/05/23	J		
114.					Buy (add'l)	04/11/23	J		
115.					Buy (add'l)	04/17/23	J		
116.					Sold (part)	04/18/23	J		
117.					Buy (add'l)	04/21/23	J		
118.					Buy (add'l)	04/24/23	J		
119.					Sold (part)	04/27/23	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
Talwani, Indira	08/13/2024

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)	
120.					Buy (add'l)	05/01/23	M		
121.					Sold (part)	05/16/23	K		
122.					Sold (part)	06/05/23	J		
123.					Sold (part)	06/07/23	J		
124.					Buy (add'l)	06/08/23	K		
125.					Buy (add'l)	06/09/23	L		
126.					Buy (add'l)	06/12/23	J		
127.					Sold (part)	06/13/23	M		
128.					Sold (part)	06/14/23	L		
129.					Buy (add'l)	06/16/23	J		
130.					Buy (add'l)	06/23/23	J		
131.					Sold (part)	06/28/23	J		
132.					Buy (add'l)	06/30/23	J		
133.					Sold (part)	07/06/23	J		
134.					Buy (add'l)	07/12/23	J		
135.					Sold (part)	07/17/23	J		
136.					Sold (part)	07/18/23	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
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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.					Buy (add'l)	07/20/23	J		
138.					Buy (add'l)	07/21/23	J		
139.					Sold (part)	07/27/23	J		
140.					Buy (add'l)	07/31/23	J		
141.					Sold (part)	08/16/23	J		
142.					Sold (part)	08/22/23	J		
143.					Buy (add'l)	08/28/23	J		
144.					Sold (part)	08/29/23	J		
145.					Sold (part)	08/31/23	J		
146.					Buy (add'l)	09/01/23	J		
147.					Buy (add'l)	09/14/23	L		
148.					Buy (add'l)	09/15/23	J		
149.					Sold (part)	09/18/23	J		
150.					Sold (part)	09/19/23	J		
151.					Buy (add'l)	09/21/23	J		
152.					Buy (add'l)	09/25/23	J		
153.					Sold (part)	09/29/23	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
Talwani, Indira	08/13/2024

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)	
154.					Buy (add'l)	09/29/23	J		
155.					Sold (part)	10/10/23	J		
156.					Sold (part)	10/13/23	J		
157.					Buy (add'l)	10/16/23	J		
158.					Sold (part)	10/17/23	J		
159.					Buy (add'l)	10/23/23	J		
160.					Buy (add'l)	10/31/23	M		
161.					Buy (add'l)	11/01/23	J		
162.					Sold (part)	11/07/23	M		
163.					Sold (part)	11/10/23	J		
164.					Sold (part)	11/16/23	J		
165.					Sold (part)	11/24/23	K		
166.					Sold (part)	11/28/23	J		
167. U.S. Treasury Bills	B	Interest	M	T					
168. U.S. Treasury Notes	E	Interest	O	T					
169. Federal Farm Credit Bank Bond 10/23/2014 2.84% 4/23/2026	C	Interest	M	T					
170. Federal Farm Credit Bond 02/27/2023 4.75% 02/27/2030	C	Interest	M	T	Buy	06/13/23	M		

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
Talwani, Indira	08/13/2024

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.)*

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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. Federal Farm Credit Bank Bond 03/23/2022 3.3% 03/23/2032	C	Interest	M	T					
172. Northern Tax Advantaged Ultra Short Fixed Income Fund (NTAUX)	B	Dividend	K	T	Sold (part)	07/11/23	J		
173. Northern Ultra Short Fixed Income Fund (NUSFX)	B	Dividend	K	T	Sold (part)	07/11/23	J		
174. Amazon.Com Inc (AMZN)		None	L	T	Sold (part)	06/07/23	J	A	
175. Aptiv PLC (APTV)		None	K	T	Buy	04/28/23	K		
176.					Buy (add'l)	11/21/23	K		
177.					Sold (part)	12/26/23	K		
178. Home Depot Inc (HD)	A	Dividend	K	T	Sold (part)	06/07/23	J	A	
179. TJX Cos Inc (TJX)	A	Dividend	K	T	Sold (part)	06/07/23	J	A	
180. Coca Cola (CO)	B	Dividend	L	T	Sold (part)	06/07/23	J	A	
181. Nestle SA (NSRGY)	B	Dividend	K	T					
182. Pepsico Inc. (PEP)	B	Dividend	K	T	Sold (part)	06/07/23	J	B	
183. Procter & Gamble Co (PG)	B	Dividend	K	T	Sold (part)	06/07/23	J	B	
184. WalMart Inc. (WMT)	A	Dividend	K	T	Sold (part)	06/07/23	J	A	
185. Bank of America (BAC)	B	Dividend	L	T	Sold (part)	06/07/23	J	A	
186. Intercontinental Exchange Inc. (ICE)	A	Dividend	K	T	Sold (part)	06/07/23	J	A	
187. JP Morgan Chase & Co. (JPM)	B	Dividend	L	T	Sold (part)	06/07/23	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		
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Talwani, Indira	08/13/2024

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.)*

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188. Progressive Corp (PGR)	A	Dividend	K	T					
189. Prologis Inc REIT (PLD)	A	Dividend	K	T	Sold (part)	06/07/23	J	A	
190. Visa (V)	A	Dividend	L	T	Sold (part)	06/07/23	J	B	
191. Abbott Labs (ABT)	A	Dividend	L	T	Sold (part)	06/07/23	J	A	
192. Becton Dickinson (BDX)	A	Dividend	K	T	Sold (part)	06/07/23	J	A	
193. Bristol Myers Squibb Co (BMY)	B	Dividend	K	T	Sold (part)	06/07/23	J	A	
194. Johnson & Johnson (JNJ)	B	Dividend	K	T	Sold (part)	06/07/23	J	B	
195. Merck & Co. Inc. (MRK)	B	Dividend	L	T	Sold (part)	06/07/23	J	B	
196.					Sold (part)	09/12/23	J	D	
197. UnitedHealth Group Inc (UNH)	A	Dividend	K	T	Sold (part)	02/06/23	K	D	
198. Zoetis Inc. (ZTS)	A	Dividend	K	T	Sold (part)	06/07/23	J	B	
199.					Sold (part)	09/12/23	K	D	
200. Eaton Corp PLC (ETN)	A	Dividend	K	T	Buy	01/24/23	K		
201.					Sold (part)	06/07/23	J	A	
202. Honeywell International Inc (HON)	B	Dividend	K	T	Sold (part)	06/07/23	K	A	
203. Union Pac Corp. (UNP)	A	Dividend	K	T	Sold (part)	01/24/23	K	E	
204.					Sold (part)	06/07/23	J	B	

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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205. Xylem Inc (XYL)	A	Dividend	K	T	Sold (part)	06/07/23	J	A	
206. Adobe Sys Inc. (ADBE)		None	K	T	Sold (part)	06/07/23	J		
207. Apple Inc. (AAPL)	A	Dividend	M	T	Sold (part)	01/18/23	J	B	
208.					Sold (part)	06/07/23	J	C	
209.					Sold (part)	06/14/23	J	B	
210. Broadcom Inc. (AVGO)	B	Dividend	L	T	Sold (part)	09/12/23	J	D	
211. Intl. Business Machines Corp. (IBM)	B	Dividend	K	T	Sold (part)	06/07/23	J	A	
212. Microsoft Corp. (MSFT)	B	Dividend	M	T	Sold (part)	06/07/23	J	B	
213.					Sold (part)	06/14/23	J	B	
214. NVIDIA Corp (NVDA)	A	Dividend	L	T	Sold (part)	05/24/23	J	D	
215.					Sold (part)	06/07/23	J	B	
216.					Sold (part)	09/12/23	J	D	
217. Salesforce, Inc. (CRM)		None	K	T					
218. ServiceNow Inc (NOW)		None	J	T	Buy	05/24/23	J		
219.					Sold (part)	06/14/23	J	A	
220. Ecolab Inc (ECL)	A	Dividend	K	T					
221. Linde Plc (LIN)	A	Dividend	L	T	Sold (part)	06/07/23	J	B	

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
Talwani, Indira	08/13/2024

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)	
222.					Sold (part)	09/12/23	K	D	
223. Rio Tinto PLC Spons ADR (RIO)	B	Dividend	K	T	Buy (add'l)	02/06/23	K		
224.					Sold (part)	06/07/23	J		
225. Alphabet Inc CL A (GOOGL)		None	M	T	Sold (part)	06/07/23	J	C	
226. Verizon Communications (VZ)	B	Dividend	K	T					
227. NextEra Energy Inc. (NEE)	B	Dividend	K	T					
228. Energy Select Sector SPDR (XLE)	C	Dividend	M	T	Sold (part)	04/06/23	J	A	
229.					Sold (part)	06/07/23	J	B	
230.					Sold (part)	06/14/23	J	A	
231. iShares Biotech ETF (IBB)	A	Dividend	K	T	Sold (part)	06/07/23	J	A	
232. iShares Core S&P Mid-Cap ETF (IJH)	A	Dividend	L	T	Sold (part)	06/07/23	J	A	
233. iShares Gold Trust (IAU)		None	M	T	Sold (part)	06/07/23	K		
234.					Sold (part)	07/19/23	J		
235. Vanguard Dividend Apprec ETF (VIG)	B	Dividend	L	T	Sold (part)	04/26/23	K	A	
236.					Sold (part)	06/07/23	J	A	
237. SPDR Portfolio Emerging Mkts ETF (SPEM)	B	Dividend	L	T	Sold (part)	06/09/23	J	A	
238. Account #10 (H)									

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
Talwani, Indira	08/13/2024

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)	
239. Citizens Bank (cash) (Y)									
240. Edward Jones (cash) (X)	A	Interest	K	T					
241. Rental property #2, Cotuit, Massachusetts	E	Rent	P1	W					
242. Account #11 (H)									
243. Edward Jones (cash) (X)	A	Dividend	J	T					
244. AT&T Inc (T)	C	Dividend			Sold	11/29/23	L		
245. Coca Cola Co (KO)	D	Dividend	N	T					
246. Enbridge Inc (ENB)	D	Dividend	L	T					
247. International Business Machines (IBM)	D	Dividend	M	T					
248. Pfizer (PFE)	D	Dividend	M	T					
249. Procter & Gamble Co (PG)	D	Dividend	N	T	Sold (part)	11/29/23	K		
250. 3M Co (MMM)	D	Dividend	L	T					
251. Verizon Communications (VZ)		None	L	T	Buy	11/29/23	L		
252. Account #12 (H)									
253. Edward Jones Insured Bank Deposit (cash) (Y)									
254. Truist Bank (cash)		None	L	T					
255. U.S. Treasury Bills		None	M	T	Buy	11/29/23	L		

1. Income Gain Codes: (See Columns B1 and D4)
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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
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H1 =$1,000,001 - $5,000,000
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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
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L =$50,001 - $100,000
M =$100,001 - $250,000
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Name of Person Reporting	Date of Report
Talwani, Indira	08/13/2024

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)	
256. Morgan Stanley Bank (cash) (Y)									
257. Silvergate Bank (cash) (Y)									
258. Wells Fargo Bank (cash)	C	Interest			Closed	11/28/23	L		
259. Procter & Gamble Co (PG)	A	Dividend	L	T					
260. Truist Finl Corp (TFC)	A	Dividend	K	T					
261. Hartford Multifctr Dev Mkt ETF (RODM)	A	Dividend	K	T					
262. iShares Core Dividend Growth ETF (DGRO)	A	Dividend	K	T					
263. iShares Russell Mid Cap ETF (IWR) (X)	A	Dividend	K	T					
264. Vanguard FTSE Emerging Markets ETF (VWO) (X)	A	Dividend	J	T					
265. Vanguard Growth ETF (VUG)	A	Dividend	K	T					
266. Vanguard S&P 500 (VOO) (X)	A	Dividend	K	T					
267. Account #13 (H)									
268. American Century Aggressive Portfolio	A	Dividend	L	T	Sold (part)	02/07/23	J		
269.					Sold (part)	03/08/23	J		
270.					Buy (add'l)	08/25/23	J		
271.					Sold (part)	11/27/23	J		
272. American Century Moderate Portfolio	A	Dividend	L	T	Sold (part)	01/09/23	J		

1. Income Gain Codes: (See Columns B1 and D4)
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3. Value Method Codes (See Column C2)
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S =Assessment
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Name of Person Reporting	Date of Report
Talwani, Indira	08/13/2024

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)	
273.					Sold (part)	02/07/23	J		
274.					Sold (part)	03/08/23	J		
275.					Buy (add'l)	08/25/23	J		
276.					Sold (part)	11/27/23	J		
277. American Century Moderately Conservative Portfolio	A	Dividend	L	T	Sold (part)	02/07/23	J		
278.					Sold (part)	03/08/23	J		
279.					Buy (add'l)	08/25/23	J		
280.					Sold (part)	11/27/23	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
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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		

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

Part VII, Account #3, Account #4, and Account #8 became reportable without corresponding reportable transactions.

Part VII, Account #9 is a trust which was neither established nor funded by my [redacted] our [redacted] or me, and we have no control over the assets or income of the trust. My [redacted] beneficiary interest in the assets of the trust is 5.5% of the value indicated in Column C.

Part VII, Account #10 and Account #11 are both part of the same trust, of which my [redacted] is a beneficiary and trustee. My [redacted] beneficiary interest is 20% of the value indicated in Column C.

Part VII, Account #12 is another trust, of which my [redacted] is a beneficiary. My [redacted] interest is 20% of the value indicated in Column C.

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value.

Name of Person Reporting	Date of Report
Talwani, Indira	08/13/2024

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/ Indira Talwani

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