AO 10
Rev. 1/2022

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2021

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
White, Jeffrey S.	U.S. District, Northern Calif	04/28/2022
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 Court Judge - Senior Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021

7. Chambers or Office Address

U.S. District Court, Northern District of Calif.
1301 Clay Street
Oakland, CA 94612

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.	2021	Orrick, Herrington and Sutcliffe Defined Benefit Plan - Retired Partner
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.	Jan - Dec	Orrick Herrington Defined Benefit Plan	$23,400.00
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.		
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.					
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
White, Jeffrey S.	04/28/2022

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		B		C		D				
Description of Assets (including trust assets)		Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure		(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
1.	Provident Credit Union	A	Interest	J	T					
2.	Orrick Investments 2000 LLC	A	Interest			Distributed	12/31/21	J		
3.	Pollock Montgomery Washington Tower Investors II Partnership	A	Distribution	J	U					
4.	Pollock 2007-2008 Independent Investors, LLC	A	Distribution	J	U					
5.	Morgan Stanley Cash Account	A	Interest	L	T					
6.	TTLC RIA 2 LLC	C	Int./Div.	L	U					
7.	TTLC Livermore Center, LLC	A	Int./Div.	M	U					
8.	TTLC Mirza, LLC	A	Int./Div.	J	U					
9.	Morgan Stanley Bank Account	A	Interest	J	T					
10.	Condo Rental - Cabo San Lucas, Baja Sur, Mexico 7/18 ($ 385,000)		None	N	R					
11.	TTLC Tarob 4, LLC	A	Int./Div.	L	U					
12.	TTLC High Point, LLC	A	Int./Div.	K	U					
13.	TTLC Sunnyvale FC LLC	A	Int./Div.	L	U					
14.	TTLC Calistoga, LLC	A	Int./Div.	L	U					
15.	The True Life Companies, LLC	B	Int./Div.	M	U					
16.	True Life Elite Fund 1 LP	D	Int./Div.	N	U					
17.	Vanguard Extended Mkt ETF (VXF)	A	Dividend	L	T	Sold (part)	02/01/21	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		
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18.					Sold (part)	06/10/21	J	A	
19.					Buy (add'l)	03/25/21	J		
20.					Sold (part)	08/02/21	J	A	
21.					Buy (add'l)	12/15/21	K		
22. Vanguard Value Etf Index (VTV)	B	Dividend	M	T	Sold (part)	02/01/21	J	A	
23.					Buy (add'l)	03/25/21	J		
24.					Sold (part)	06/10/21	J	B	
25.					Sold (part)	08/02/21	J	B	
26.					Buy	12/15/21	K		
27. MSIF Growth I (MSEQXS)	D	Dividend	L	T	Sold (part)	02/01/21	J		
28.					Buy (add'l)	03/25/21	J		
29.					Sold (part)	06/10/21	J		
30.					Sold (part)	08/02/21	J	A	
31.					Buy (add'l)	12/15/21	K		
32. Morgan Stanley IRA # 1 (H)									
33. - Bank Deposit Program	A	Interest	K	T					
34. -ISHARES FTSE/Xinua China 25	A	Dividend	K	T					

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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. -ISHARES - MSCI EAFE Index Fund	C	Dividend	M	T	Buy (add'l)	02/25/21	J		
36.					Buy (add'l)	03/08/21	J		
37.					Buy (add'l)	03/24/21	J		
38. -ISHARES - MSCI Emerging Markets Index	B	Dividend	L	T	Buy (add'l)	02/25/21	K		
39.					Buy (add'l)	03/08/21	J		
40.					Buy (add'l)	03/24/21	J		
41. -ISHARES - S&P Europe 350 Index	B	Dividend	L	T	Buy (add'l)	02/25/21	K		
42.					Buy (add'l)	03/24/21	J		
43. -First TR Exchange Traded FD Dow Jones		None	L	T	Sold (part)	03/01/21	K	E	
44.					Sold (part)	12/10/21	J	D	
45. -Ishares TR Russell Mid-Cap ETF	A	Dividend	K	T					
46. -Ishares TR S&P Small-Cap 600 Growth	A	Dividend	J	T	Sold (part)	03/01/21	K	D	
47. -Blackrock Global Allocation I (MALOX)	D	Dividend	M	T	Buy (add'l)	03/23/21	J		
48.					Sold (part)	12/10/21	K	C	
49. -Cons Discret Sel Sect Spdr Fd (XLY)	A	Dividend	K	T	Buy (add'l)	03/24/21	J		
50.					Buy	04/30/21	J		
51. -Ishares Russell 2000 ETF (IWM)	A	Dividend	K	T	Sold (part)	03/01/21	J	C	

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52. -Principal Preferred Sec Inst (PPSIX)	D	Dividend	M	T	Buy (add'l)	03/23/21	J		
53. -SPDR Trust Series 1 (SPY)	C	Dividend	N	T	Sold (part)	03/01/21	M	F	
54. -Telsa Motors Inc (TSLA)		None	O	T	Sold (part)	03/08/21	M	G	
55. - Ishares Core High Dividend ETF (HDV)	C	Dividend	L	T	Buy (add'l)	02/25/21	J		
56.					Buy (add'l)	03/08/21	J		
57. -Vanguard Dividend Appreciation (VIG)	D	Dividend	N	T	Buy (add'l)	02/25/21	L		
58. -Doubleline Core Fixed Inc (DBLFX)	D	Dividend	M	T					
59. -Van Eck Emerging Markets Y (EMRYX)	D	Dividend	M	T	Buy (add'l)	04/30/21	J		
60.					Buy (add'l)	05/11/21	J		
61. -Blockrock Strategic Inc (BSIIX)	C	Dividend	M	T	Buy (add'l)	03/31/21	J		
62. -Templeton Global BD FD (TBGAX)	B	Dividend	K	T	Sold (part)	03/01/21	K		
63.					Buy (add'l)	03/23/21	J		
64.					Buy (add'l)	04/30/21	J		
65. -Principal Midcap Instl (PCBIX)	E	Dividend	M	T	Buy (add'l)	03/24/21	K		
66.					Buy (add'l)	03/31/21	J		
67. -Clearbridge All Cap Value I (SFVYX)	D	Dividend	L	T	Buy (add'l)	03/08/21	J		
68.					Buy (add'l)	03/24/21	K		

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69. -Utilities Sel Sec SPDR FUnd (XLU)	B	Dividend	L	T					
70. -Putnam Short Duration Income Y (PSDYX)	A	Dividend	K	T	Sold (part)	01/25/21	K		
71. -Blackrock Corp High Yield (HYT)	B	Dividend	K	T					
72. -Blackrock Science & Tech (BSTZ)	C	Dividend	K	T	Buy (add'l)	03/23/21	J		
73. -First Tr High Yl (HYLS)	C	Dividend	L	T					
74. -First Trust High Inc (FSD)	C	Dividend	K	T					
75. -FT Nasdaq Cybersecur ETF (CIBR)	A	Dividend	K	T	Buy (add'l)	03/31/21	J		
76. -Invesco Optimum Yield Diversif (PDBC)	F	Dividend	L	T	Buy (add'l)	01/21/21	K		
77.					Buy (add'l)	02/25/21	K		
78.					Buy (add'l)	03/08/21	J		
79.					Buy (add'l)	03/31/21	J		
80.					Buy (add'l)	04/30/21	J		
81.					Buy (add'l)	05/11/21	K		
82.					Sold (part)	12/10/21	K	A	
83. -SLV		None	K	T					
84. -Mint	A	Dividend	L	T	Buy (add'l)	03/23/21	K		
85. -GDX	A	Dividend	K	T	Buy (add'l)	03/08/21	J		

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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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86.					Buy (add'l)	03/31/21	J		
87. -GDXJ	A	Dividend	K	T	Buy (add'l)	02/25/21	J		
88.					Buy (add'l)	03/08/21	J		
89.					Buy (add'l)	03/23/21	J		
90.					Buy (add'l)	03/31/21	J		
91. - RYPRX	E	Dividend	L	T	Buy (add'l)	03/08/21	J		
92.					Buy (add'l)	03/24/21	K		
93.					Buy (add'l)	03/31/21	K		
94. -SGDIX		None	L	T	Buy (add'l)	03/23/21	J		
95.					Buy (add'l)	03/31/21	J		
96.					Buy (add'l)	05/11/21	K		
97. -URA	A	Dividend	K	T	Buy	03/23/21	J		
98.					Buy (add'l)	03/31/21	J		
99.					Buy (add'l)	04/30/21	J		
100.					Buy (add'l)	05/11/21	J		
101. -RPV	A	Dividend	K	T	Buy	03/08/21	K		
102.					Buy (add'l)	03/31/21	J		

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103. -MTUM	A	Dividend	L	T	Buy	03/10/21	K		
104.					Buy (add'l)	03/24/21	J		
105. -ICLN	A	Dividend	K	T	Buy	02/25/21	J		
106.					Buy (add'l)	03/24/21	J		
107.					Buy (add'l)	03/31/21	J		
108.					Buy (add'l)	04/31/21	J		
109. -Nobl	A	Dividend	K	T	Buy	03/08/21	K		
110.					Buy (add'l)	03/31/21	J		
111. -RWR	B	Distribution	L	T	Buy	03/08/21	K		
112.					Buy (add'l)	03/24/21	J		
113.					Buy (add'l)	04/30/21	J		
114. -PSLV		None	J	T	Buy	03/31/21	J		
115.					Buy (add'l)	04/30/21	J		
116. -WIW	B	Dividend	K	T	Buy	03/31/21	K		
117. -MEIIX	B	Dividend	L	T	Buy	03/24/21	K		
118.					Buy (add'l)	03/31/21	K		
119.					Buy (add'l)	05/11/21	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
White, Jeffrey S.	04/28/2022

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. -MSACX	D	Dividend	L	T	Buy	03/08/21	K		
121.					Buy (add'l)	03/24/21	K		
122.					Buy (add'l)	03/31/21	J		
123.					Buy (add'l)	04/30/21	K		
124. -MTIIX	B	Dividend	K	T	Buy	03/31/21	J		
125.					Buy (add'l)	04/30/21	J		
126. Morgan Stanely IRA # 2 (H)									
127. -Invesco QQQ Trust, Series 1 (QQQ)	A	Dividend	K	T	Sold (part)	12/10/21	K	E	
128. -iShares S&P 500/Barr Growth	A	Dividend	L	T	Sold (part)	12/10/21	J	C	
129. -iShares S&P Global 100	A	Dividend	J	T					
130. - Bank Deposit Program	A	Interest	J	T					
131. -RSP	A	Dividend	J	T	Buy	12/14/21	J		
132. -RPV	A	Dividend	J	T	Buy	12/14/21	J		
133. -IEFA	A	Dividend	J	T	Buy	12/14/21	J		
134. -USMV	A	Dividend	J	T	Buy	12/14/21	J		
135. -MTUM	A	Dividend	J	T	Buy	12/14/21	J		
136. -NOBL	A	Dividend	J	T	Buy	12/14/21	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
White, Jeffrey S.	04/28/2022

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	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
137. -VGK	A	Dividend	J	T	Buy	12/14/21	J		
138. -DXJ	A	Dividend	J	T	Buy	12/14/21	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		

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

Name of Person Reporting	Date of Report
White, Jeffrey S.	04/28/2022

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 S. White

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
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