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
Whitehead, Jamal N.	U.S. District Court for the Western District of Washington	08/11/2024
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	01/01/2023 **to** 12/31/2023
	5b. ☐ Amended Report	
7. Chambers or Office Address		
United States Courthouse 700 Stewart Street Seattle, WA 98101		

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.	2016	Schroeter Goldmark & Bender 401(k) (reportable assets are listed in Part VII)
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. 2023	Schroeter Goldmark & Bender (salary)	$25,692.20
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.				

Name of Person Reporting	Date of Report
Whitehead, Jamal N.	08/11/2024

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.	U.S. Department of Education	Student Loans	L
2.			
3.			
4.			
5.			

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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)	
1.	Individual Assets (H)									
2.	Boeing Employees Credit Union - BECU (cash)	A	Int./Div.	J	T					
3.	Chase Bank (cash) (Y)									
4.	Morgan Stanley (cash) (X)	A	Interest	N	T					
5.	Account #1 (H)									
6.	American Funds 2045 Target Date Retirement Fund (CCHTX)		None			Sold	03/30/23	M		
7.						Buy	09/11/23	K		
8.						Sold	09/18/23	K		
9.	Account #2 (H)									
10.	Vanguard Target Retirement 2045 Fund (VTIVX) (X)		None			Sold	04/04/23	J		
11.	T Rowe Price Large Cap Value Fund I (TILCX) (Y)									
12.	Vanguard Mid Cap Index Inst Fund (VMCIX) (Y)									
13.	Lord Abbett Developing Growth Fund I (LADYX) (Y)									
14.	Vanguard Small Cap Index Instl (VSCIX) (Y)									
15.	Harbor Capital Appreciation Instl Cl (HACAX) (Y)									
16.	Vanguard Emerging Markets Stock Index (VEMAX) (Y)									
17.	Vanguard Developed Markets Index IS (VTMGX) (Y)									

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
Whitehead, Jamal N.	08/11/2024

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. Vanguard Instl Index Plus (VIIIX) (Y)									
19. Cohen & Steers Instl Realty Shares (CSRIX) (Y)									
20. Account #3 (H)									
21. MS Pathway Core Fixed Income (TIIUX)	A	Dividend	K	T	Buy (add'l)	06/28/23	J		
22. MS Pathway Emerging Markets (TEMUX)	A	Dividend	J	T	Buy	06/28/23	J		
23. MS Pathway High Yield (THYUX)	A	Dividend	J	T	Buy	06/28/23	J		
24. MS Pathway International Eq (TIEUX)	A	Dividend	J	T	Buy (add'l)	06/28/23	J		
25. MS Pathway International Fixed Income (TIFUX)	A	Dividend	J	T	Buy	06/28/23	J		
26. MS Pathway Large Cap Equity (TLGUX)	B	Dividend	K	T	Buy (add'l)	06/28/23	K		
27. MS Pathway Small Mid Cap Eq (TSGUX)	A	Dividend	J	T	Buy (add'l)	06/28/23	J		
28. MS Pathway Ultra Short Fixed Income (TSDUX) (X)	A	Dividend	J	T	Buy (add'l)	06/28/23	J		
29. Account #4 (H)									
30. American Bond Fund of America F2 (ABNFX) (X)	A	Dividend	J	T					
31. BlackRock Total Return Fund Institutional Shares (MAHQX) (X)	A	Dividend	J	T					
32. BNY Mellon International Stock Fund Class I (DISRX) (X)	A	Dividend	J	T					
33. Edgewood Growth Fund Class Institutional (EGFIX) (X)		None	J	T					
34. GQG Partners Emerging Markets Equity Fund Instl Shares (GQGIX) (X) (Y)									

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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)	
35. Hartford Dividend & Growth I (HDGIX) (Y)									
36. Hartford Schroder Emerging Markets Equity Fund Class I (HDGIX) (X) (Y)									
37. JPMorgan U.S. Equity Fund Class I (JUESX)	A	Dividend	J	T	Buy	09/22/23	J		
38. JPM Value Advantage I (JVASX) (Y)									
39. Lazard International Strategic Equity Instl Shares (LISIX) (X)	A	Dividend	J	T					
40. Loomis Sayles Growth Fund Class Y (LSGRX) (X)	A	Dividend	J	T					
41. Met West Tot Ret Bd I (MWTIX)	A	Dividend	J	T					
42. Pear Tree Polaris Foreign Value Fund Class Institutional (QFVIX) (X)	A	Dividend	J	T					
43. Pimco Low Duration Inc 12 (PFTPX)	A	Dividend	J	T					
44. Western Asset Core Plus Bond Fund Class I (WACPX) (X)	A	Dividend	J	T					
45. Account #5 (H)									
46. Morgan Stanley Bank (cash) (X)	A	Interest	J	T					
47. Invesco QQQ Trust (QQQ)	A	Dividend	J	T	Sold (part)	03/16/23	J		
48.					Buy (add'l)	04/17/23	J		
49. Invesco S&P 500 Equal Weight (RVF)	A	Dividend	J	T	Sold (part)	03/16/23	J		
50. Invesco S&P Smallcap 600 (RWJ)	A	Dividend	K	T	Buy (add'l)	04/17/23	J		
51. iShares Expanded Tech Sector (IGM)	A	Dividend	J	T					

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52. iShares Russell 1000 GRW ETF (IWF)	A	Dividend			Buy	03/16/23	J		
53.					Sold	04/17/23	J	A	
54. iShares Russell 2000 Value ETF (IWN)	A	Dividend			Buy	03/16/23	J		
55.					Sold	04/17/23	J		
56. iShares Semiconductor ETF (SOXX)	A	Dividend	J	T					
57. iShares US Financials ETF (IYF)	A	Dividend	J	T					
58. PACER US Cash Cows 100 ETF (COWZ)	A	Dividend	J	T					
59. SPDR S&P Aerospace & Def EtF (XAR)	A	Dividend	J	T					
60. SPDR S&P Health Care Ser ETF (XHS)	A	Dividend	J	T					
61. Invesco Premier Inst (IPPXX) (cash eq.)	D	Dividend	M	T					
62. Baron Partners Instl (BPTIX)		None			Sold	05/30/23	K		
63. Baron Real Estate Inst (BREIX)	A	Dividend	K	T					
64. Fidelity Adv Balanced I (FAIOX)	A	Dividend	K	T					
65. Goldman Sachs GQG Intl Opp I (GSIMX)	A	Dividend	K	T					
66. Goldman Sachs LG CP CR Inst (GSPIX)	A	Dividend	K	T					
67. Goldman Sachs LGCP GW Insight (GCGIX)	A	Dividend	J	T					
68. Invesco Short Term Muni Y (ORSYX)	B	Dividend	L	T					

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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		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(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)	
69.	Lazard Emerging Mkts Eq I (LZEMX)	B	Dividend	K	T					
70.	Nuveen Hi Yld Muni Bond (NHMRX)	C	Dividend	L	T	Buy (add'l)	05/30/23	J		
71.						Buy (add'l)	12/15/23	J		
72.	TRP Value Fund (TRVLX)	A	Dividend	J	T					
73.	Virtus KAR Mid-Cap Growth Fund Class I (PICMX)		None	K	T	Buy	05/30/23	K		
74.	Account #6 (H)									
75.	MSBNA Preferred Savings (cash)	A	Interest	M	T					
76.	NW Life NW IUL Protector II: ONE-YEAR UNCAPPED S&P 500 POIN (X)		None	J	T					
77.	Account #7 (H)									
78.	Morgan Stanley Bank (cash) (X)	A	Interest	J	T					
79.	King Cnty Wash Swr Rev Bond (495289X96) (X)	A	Interest	J	T					
80.	Virginia Comwlth Transn Brd Transn Rev Bond (927793XR5) (X)	A	Interest	K	T					
81.	New York NY City Transitional Fin Auth Bond (64971X6U7)	A	Interest	J	T	Buy	03/15/23	J		
82.	Conroe Tex Indpt Sch Dist Ref-A PSF-GTD ID Bond (208418T29) (X)	A	Interest	J	T					
83.	Iowa Fin Auth Rev Bond (46246K4A7)	A	Interest	J	T	Buy	03/27/23	J		
84.	Illinois St Toll Hwy Auth Toll Highway Rev Bond (452252NC9) (X)	A	Interest	J	T					
85.	Purdue Univ Ind Univ Revs Bond (746189B65)		None	J	T	Buy	04/06/23	J		

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3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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86.	Nevada St Hwy Impt Rev Ref Bond (641480HZ4)	A	Interest	J	T	Buy	03/20/23	J		
87.	University Wash Univ Genl Oblig Rev Ref-A Bond (91523NVK9)	A	Interest	J	T	Buy	04/13/23	J		
88.	Trinity River Auth Tex Regl Wastewtr Sys ID Bond (89658HVC1) (X)	A	Interest	J	T					
89.	California St 5.0% Bond (13063DWN4) (X)	A	Interest	K	T					
90.	Energy Northwest Wash Elec Rev Ref-A Bond (29270CV36)	A	Interest	J	T	Buy	03/20/23	J		
91.	Massachusetts Bay Transn Auth Mass Sales Bond (575579R74)	A	Interest			Buy	03/16/23	J		
92.						Sold	09/14/23	J		
93.	New York NY 5.0% Bond (64966QM56) (X)	A	Interest	J	T					
94.	Lower Colo Riv Auth Tex Transmission Con ID Bond (54811BA27) (X)	A	Interest	J	T					
95.	New York NY City Transitional Fin Auth Bond (64971X4S4) (X)	A	Interest	J	T					
96.	Michigan Fin Auth Rev Ref-M Bond (59447TPN7) (X)	A	Interest	J	T					
97.	San Antonio Tex Wtr Rev-8 Bond (79642GPA4)	A	Interest	J	T	Buy	04/24/23	J		
98.	New York NY City Mun Wtr Fin Auth Wtr Bond (64972GD43) (X)	A	Interest	J	T					
99.	California St 5.0% Bond (13063D3X4)	A	Interest	J	T	Buy	04/06/23	J		
100.	Oregon St 5.0% Bond (68609UBZ7)	A	Interest	J	T	Buy	03/16/23	J		
101.	Philadelphia PA Wtr & Wastewater Rev (7178932K6)		None	J	T	Buy	09/20/23	J		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
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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
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3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
S =Assessment
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V =Other
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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

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 values.

Parenthetical numbers in Part VII are CUSIP numbers which, like ticker symbols, are standard asset identifiers. They contain no security-based information.

Name of Person Reporting	Date of Report
Whitehead, Jamal N.	08/11/2024

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/ Jamal N. Whitehead

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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