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
WILKEN, CLAUDIA	USDC FOR THE NO DIST OF CALIF	05/07/2025
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**
US DISTRICT JUDGE, SENIOR	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final	01/01/2024 **to** 12/31/2024
	5b. ☐ Amended Report	
7. Chambers or Office Address		
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.	TRUSTEE	TRUST #3
2.	TRUSTEE	TRUST #5
3.	TRUSTEE	TRUST #6
4.	TRUSTEE	TRUST #7
5.	TRUSTEE	TRUST #8

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	SELF-EMPLOYED ATTORNEY
2.	2024	UNIVERSITY OF CALIFORNIA WAGES
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
WILKEN, CLAUDIA	05/07/2025

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.	Wells Fargo Bank accounts	A	Interest	L	T					
2.	Schwab Cash Deposit Account		None	J	T					
3.	Victory Tax Exempt Inter-term Fd (USATX)	A	Dividend	J	T					
4.	Schwab S&P 500 Index Fd (SWPPX)	A	Dividend	L	T					
5.	Baird Core Plus Bd Inv (BCOSX)	A	Dividend	J	T					
6.	BNY Mellon Small Cap Stk Ind Fd (DISSX)	A	Dividend	J	T					
7.	Schwab Bank (cash account)	A	Interest	J	T					
8.	Schwab Value Advantage Money Mkt Fd (SWVXX)	D	Dividend	M	T					
9.	Schwab US Treasury Money Investor (SNSXX)	A	Dividend	K	T	Buy	11/13/24	K		
10.	Schwab Treasury Oblig Money Inv (SNOXX)	A	Dividend	J	T					
11.	Schwab S&P 500 Index Fd (SWPPX)	C	Dividend	N	T					
12.	Victory Tax Exempt Inter-term Fd (USATX)	D	Dividend	N	T	Buy (add'l)	01/19/24	J		
13.	Baird Core Plus Bd Inv (BCOSX)	C	Dividend	M	T					
14.	Schwab Fund Intl Large Co Index (SFNNX)	D	Dividend	M	T	Buy (add'l)	01/05/24	J		
15.						Buy (add'l)	01/10/24	J		
16.						Buy (add'l)	01/18/24	J		
17.						Buy (add'l)	01/24/24	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

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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.	Schwab Fund Intl Small Co Index (SFILX)	B	Dividend	K	T	Buy (add'l)	01/05/24	J		
19.						Buy (add'l)	01/10/24	J		
20.	Dodge & Cox Income Fd (DODIX)	B	Dividend	K	T					
21.	Schwab US Small Cap ETF (SCHA)	A	Dividend	K	T	Sold (part)	10/11/24	J	A	
22.	Schwab US Aggregate Bond ETF (SCHZ)	C	Dividend	L	T	Sold (part)	10/11/24	J	A	
23.	Ishares Russell 2000 (IWM)	A	Dividend	K	T					
24.	SPDR S&P 500 ETF (SPY)	A	Dividend	K	T					
25.	Schwab Bank Savings Sweep	D	Interest	M	T					
26.	Charles Schwab US REIT (SCHH)	A	Dividend	J	T	Buy (add'l)	06/12/24	J		
27.						Buy (add'l)	12/30/24	J		
28.	IShares Gold ETF (IAU)		None			Sold	08/06/24	J	C	
29.	Schwab Emerging Markets Equity ETF (SCHE)	A	Dividend	K	T	Buy (add'l)	01/05/24	J		
30.						Buy (add'l)	01/10/24	J		
31.						Buy (add'l)	08/27/24	J		
32.						Buy (add'l)	11/15/24	J		
33.	Schwab Fundamental Emerg Mkts Lg Co ETF (FNDE)	B	Dividend	K	T	Buy (add'l)	01/05/24	J		
34.						Buy (add'l)	01/18/24	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

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35.					Buy (add'l)	11/15/24	J		
36. Schwab Fundamental Intl Lg Co ETF (FNDF)	B	Dividend	L	T	Buy (add'l)	01/10/24	J		
37.					Buy (add'l)	06/12/24	J		
38.					Buy (add'l)	08/06/24	J		
39.					Buy (add'l)	10/22/24	J		
40.					Buy (add'l)	11/15/24	J		
41.					Buy (add'l)	12/30/24	J		
42. Schwab Fundamental Intl Sm Co ETF (FNDC)	B	Dividend	K	T					
43. Schwab Fundamental US Large Co ETF (FNDX)	B	Dividend	L	T	Buy (add'l)	01/05/24	J		
44.					Buy (add'l)	01/18/24	J		
45.					Buy (add'l)	06/12/24	J		
46.					Buy (add'l)	12/30/24	J		
47. Schwab Fundamental US Small Co ETF (FNDA)	B	Dividend	L	T	Buy (add'l)	04/12/24	J		
48.					Buy (add'l)	12/30/24	J		
49. Schwab International Equity ETF (SCHF)	B	Dividend	K	T	Buy (add'l)	01/18/24	J		
50.					Buy (add'l)	11/15/24	J		
51. Schwab International Small Cap Eqty ETF (SCHC)	A	Dividend	J	T	Buy (add'l)	02/05/24	J		

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52.					Buy (add'l)	04/12/24	J		
53.					Buy (add'l)	12/30/24	J		
54. Schwab US Large Cap ETF (SCHX)	A	Dividend	L	T	Buy (add'l)	01/10/24	J		
55.					Buy (add'l)	08/06/24	J		
56.					Buy (add'l)	08/27/24	J		
57.					Buy (add'l)	10/04/24	J		
58. Schwab US Small Cap ETF (SCHA)	B	Dividend	K	T	Buy (add'l)	06/12/24	J		
59. SPDR Blmbrg Brcly Emg Mkt LCL ETF (EBND)	A	Dividend	J	T	Buy (add'l)	01/05/24	J		
60.					Buy (add'l)	01/10/24	J		
61.					Buy (add'l)	02/05/24	J		
62.					Buy (add'l)	04/12/24	J		
63. Xtrackers Inter Real Est ETF (HAUZ)	A	Dividend	J	T					
64. IShares CA Muni Bond ETF (CMF)	C	Dividend	M	T	Buy (add'l)	01/05/24	J		
65.					Buy (add'l)	01/10/24	J		
66.					Buy (add'l)	01/18/24	J		
67.					Buy (add'l)	02/05/24	J		
68.					Buy (add'l)	04/02/24	J		

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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)	
69.					Buy (add'l)	04/12/24	J		
70.					Buy (add'l)	06/12/24	J		
71.					Buy (add'l)	08/06/24	L		
72.					Buy (add'l)	08/27/24	K		
73.					Buy (add'l)	10/04/24	J		
74.					Buy (add'l)	10/22/24	J		
75.					Buy (add'l)	11/15/24	J		
76.					Sold (part)	12/19/24	M		
77.	Schwab US TIPS ETF (SCHP)	A	Dividend	K	T	Buy (add'l)	02/05/24	J		
78.					Buy (add'l)	10/22/24	J		
79.	Invesco FTSE RAFI Emerging Mkts ETF (PXH)	B	Dividend	K	T	Buy (add'l)	01/10/24	J		
80.	Invesco CA AMT Free Mncpl Bnd ETF (PWZ)	B	Dividend			Sold	08/06/24	L	D	
81.	IShares Core MSCI Emerging ETF (IEMG)	B	Dividend	K	T					
82.	IShares Core US REIT ETF (USRT)	A	Dividend	J	T					
83.	SPDR Portfolio TIPS ETF (SPIP)	A	Dividend	J	T	Buy	10/04/24	J		
84.	Vaneck JP Morgan EM LCL Cry Bnd ETF (EMLC)	A	Dividend	J	T					
85.	Vanguard FTSE All Wrld Ex US Sml Cap ETF (VSS)	A	Dividend	J	T					

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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
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86. Xtrackers USD High Yield Cor Bnd ETF (HYLB)	A	Dividend	J	T					
87. Schwab High Yield Bond ETF (SCYB)	A	Dividend	J	T	Buy	08/06/24	J		
88. Vanguard California Tax Bnd ETF (VTEC)	C	Dividend	M	T	Buy	12/19/24	M		
89. IRA #1: Schwab Bank (cash account)	A	Interest	J	T					
90. IRA #1: Baird Core Plus Bd Inv (BCOSX)	A	Dividend	J	T	Distributed (part)	10/11/24	J		
91. IRA #1: BNY Mellon Small Cap Stk Ind Fd (DISSX)	B	Dividend	K	T	Distributed (part)	10/11/24	J		
92. IRA #1: Invesco S&P Intl Dev Low Vol ETF (IDLV)	A	Dividend	K	T					
93. IRA #1: Schwab S&P 500 Index Fd (SWPPX)	A	Dividend	J	T					
94. IRA #2: Schwab Bank (cash account)	A	Interest	J	T					
95. IRA #2: Dodge & Cox Income Fd (DODIX)	C	Dividend	L	T					
96. IRA #2: Vanguard 500 Index Fd (VFIAX)	D	Dividend	O	T					
97. IRA #2: Ishares Russell 2000 (IWM)	A	Dividend	K	T					
98. IRA #2: Baird Core Plus Bd Inv (BCOSX)	C	Dividend	K	T	Distributed (part)	10/15/24	K		
99. IRA #2: Ishares Core S&P ETF (IJH)	B	Dividend	M	T	Sold (part)	02/22/24	J	A	
100. IRA #2: SPDR S&P 500 ETF (SPY)	C	Dividend	N	T	Sold (part)	10/16/24	J	C	
101. IRA #2: SPDR S&P Dividend ETF (SDY)	B	Dividend	K	T					
102. IRA #2: Invesco S&P Intl Dev Low Vol ETF (IDLV)	B	Dividend	L	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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Name of Person Reporting	Date of Report
WILKEN, CLAUDIA	05/07/2025

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)	
103. IRA #2: Schwab Fund Intl Large Co Index (SFNNX)	A	Dividend	J	T					
104. SEP-IRA #1: Schwab Cash Deposit Account	A	Interest	J	T					
105. SEP-IRA #1: Schwab Tsy Obligation MMF (SNOXX)	A	Dividend	K	T	Distributed (part)	10/14/24	J		
106. SEP-IRA #1: Schwab S&P 500 Index Fd (SWPPX)	B	Dividend	K	T	Buy (add'l)	06/14/24	J		
107. SEP-IRA #1: SPDR S&P 500 ETF (SPY)	A	Dividend	K	T	Sold (part)	10/15/24	J	B	
108. SEP-IRA #1: Schwab US Aggregate Bond ETF (SCHZ)	C	Dividend	L	T	Sold (part)	10/11/24	J		
109. SEP-IRA #1: Schwab Fund Intl Large Co Index (SFNNX)	A	Dividend	J	T					
110. SEP-IRA #1: Schwab Value Advantage Money Mkt Fd (SWVXX)	A	Dividend	L	T	Buy	03/14/24	L		
111. Trust #3: Schwab 529 30% Equity Portfolio		None	K	T	Buy (add'l)	01/18/24	J		
112.					Distributed (part)	08/01/24	J		
113.					Distributed (part)	08/26/24	J		
114.					Distributed (part)	11/14/24	J		
115. Trust #5: Schwab 529 40% Equity Portfolio		None	K	T	Buy (add'l)	01/03/24	J		
116.					Buy (add'l)	01/18/24	J		
117.					Buy (add'l)	02/05/24	J		
118.					Buy (add'l)	03/05/24	J		
119.					Buy (add'l)	04/03/24	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
WILKEN, CLAUDIA	05/07/2025

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)	
120.					Buy (add'l)	05/03/24	J		
121.					Buy (add'l)	06/04/24	J		
122.					Buy (add'l)	07/03/24	J		
123.					Buy (add'l)	08/05/24	J		
124.					Buy (add'l)	09/04/24	J		
125.					Buy (add'l)	10/03/24	J		
126.					Buy (add'l)	11/05/24	J		
127.					Buy (add'l)	12/03/24	J		
128. Trust #5: Schwab 529 60% Equity Portfolio		None	K	T	Buy	06/04/24	J		
129.					Buy (add'l)	07/03/24	J		
130.					Buy (add'l)	08/05/24	J		
131.					Buy (add'l)	09/04/24	J		
132.					Buy (add'l)	10/03/24	J		
133.					Buy (add'l)	11/05/24	J		
134.					Buy (add'l)	12/03/24	J		
135. Trust #6: Schwab 529 70% Equity Portfolio		None	K	T	Buy (add'l)	01/18/24	J		
136.					Buy (add'l)	01/18/24	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	
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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)	
137.					Buy (add'l)	02/21/24	J		
138.					Buy (add'l)	03/19/24	J		
139.					Buy (add'l)	04/18/24	J		
140.					Buy (add'l)	05/20/24	J		
141.					Buy (add'l)	06/18/24	J		
142.					Buy (add'l)	07/18/24	J		
143.					Buy (add'l)	08/20/24	J		
144.					Buy (add'l)	09/18/24	J		
145.					Buy (add'l)	10/18/24	J		
146.					Buy (add'l)	11/19/24	J		
147.					Buy (add'l)	12/18/24	J		
148. Trust #7: Schwab 529 60% Equity Portfolio		None	J	T	Buy	08/22/24	J		
149. Trust #7: Schwab 529 95% Equity Portfolio		None	J	T	Buy	08/22/24	J		
150. Trust #8: Schwab 529 95% Equity Portfolio		None	J	T	Buy	10/11/24	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	
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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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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Part VII, Investments and Trusts:

Lines 5 & 90 - Baird Core Plus Bd Inv (BCOSX) shares transferred from IRA #1 to non-retirement account on 10/11/24. Value on date of transfer $1,079.00.

Lines 6 & 91 - BNY Mellon Small Cap Stk Ind Fd (DISSX) shares transferred from IRA #1 to non-retirement account on 10/11/24. Value on date of transfer $1,378.00.

Lines 10 & 105 - Schwab Tsy Obligation MMF (SNOXX) shares transferred from SEP-IRA #1 to non-retirement account on 10/14/24. Value on date of transfer $8,000.

Lines 13 & 98 - Baird Core Plus Bd Inv (BCOSX) shares transferred from IRA #2 to non-retirement account on 10/15/24. Value on date of transfer $37,870.

Lines 112, 113, & 114: Sec. 529 account distributions made to beneficiary.

Lines 115 & 128 - Trust #5 Age-based exchange of Sec. 529 education funds, with no purchase or sale by filer. 06/21/24 exchange out of Schwab 529 40% Equity Portfolio to Schwab 529 60% Equity Portfolio. Value on date of exchange $25,304.65.

Name of Person Reporting	Date of Report
WILKEN, CLAUDIA	05/07/2025

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/ CLAUDIA WILKEN

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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