AO 10
Rev. 1/2022

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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
Wood, Kimba M.	U.S. District Court, SDNY	10/27/2023
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 (Senior)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	1/1/2022 **to** 12/31/2022
7. Chambers or Office Address		
500 Pearl Street New York, NY 10007		

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.	Board Member - Resigned from Board on Aprl 12, 2022	New York City Ballet, Inc.
2.	Trustee	The Frank E. Richardson 2011 Insurance Trust Agreement (See Note 4 in Section VIII)
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.		

Name of Person Reporting	Date of Report
Wood, Kimba M.	10/27/2023

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.	2022*	Morgan Stanley Pension Benefit
2.		
3.		
4.		
5.	*(various)	

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.	Citibank	Line of Credit	O
2.	American Express	Credit Card	K
3.	Sentinel Capital Continuation Fund	Fund invested on behalf of LPs in 2022 (Sect VII Line 1787).Will issue capital call to cover in 2023	M
4.			
5.			

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Wood, Kimba M.	10/27/2023

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. EXXON CORP COMMON STOCK	C	Dividend	L	T					
2. INVESTMENT ACCOUNT #1 (LINES 3-27) (IA) (H)									
3. ---FIRST AM GOVT OB FUND CL Z MMF (NOTE 14 IN SECT VIII)	B	Dividend	K	T	Buy (add'l)	03/30/22	K		
4.					Sold (part)	04/06/22	L		
5.					Buy (add'l)	05/20/22	M		
6.					Sold (part)	07/25/22	M		
7.					Buy (add'l)	08/29/22	M		
8.					Sold (part)	09/26/22	L		
9.					Buy (add'l)	11/07/22	L		
10.					Buy (add'l)	11/08/22	K		
11.					Sold (part)	11/17/22	M		
12.					Buy (add'l)	12/29/22	J		
13. ---ARTISAN INTERNATIONAL VALUE ADVISOR	B	Dividend	L	T	Buy (add'l)	11/16/22	J		
14. ---BROWN ADV BEUTI GDMAN LRGE CAP INST	D	Dividend	N	T	Buy (add'l)	09/23/22	L		
15.					Buy (add'l)	12/14/22	J		
16. ---BROWN ADV EMG MKTS INS	A	Dividend	L	T	Buy (add'l)	04/05/22	J		
17. ---BROWN ADV GLOBAL LEADERS	A	Dividend	M	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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☐ 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)	
18. ---BROWN ADV SMALL CAP FUNDAMENTAL VALUE	D	Dividend	M	T	Sold (part)	07/22/22	J		
19.					Buy (add'l)	12/14/22	J		
20. ---BROWN ADV SMALL CAP GROWTH INV	D	Dividend	M	T	Buy (add'l)	04/05/22	K		
21.					Buy (add'l)	07/22/22	J		
22.					Buy (add'l)	11/16/22	J		
23.					Buy (add'l)	12/14/22	J		
24. ---BROWN ADV SUSTAINABLE GROWTH	A	Dividend	N	T	Buy (add'l)	04/05/22	K		
25.					Buy (add'l)	11/16/22	L		
26. ---BROWN ADV TAX EXEMPT BND INS	C	Dividend	M	T	Buy (add'l)	11/16/22	K		
27. ---US TREASURY BILL (INTEREST PAID AT MATURITY IN 2023)		None	M	T	Buy	07/22/22	M		
28. INVESTMENT ACCOUNT #2 - FOR IRA #1 (LINES 29-53) (H)									
29. ---FIRST AM GOVT OB MMF (NOTE 14 IN SECT VIII)	A	Dividend	L	T	Sold (part)	03/01/22	L		
30.					Buy (add'l)	07/01/22	L		
31.					Sold (part)	07/05/22	L		
32.					Buy (add'l)	07/25/22	J		
33.					Buy (add'l)	09/19/22	J		
34.					Buy (add'l)	12/29/22	K		

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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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	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)	
35.	---ARTISAN INTERNATIONAL VALUE ADVISOR	D	Dividend	N	T	Buy (add'l)	02/28/22	K		
36.						Buy (add'l)	11/16/22	J		
37.	---BROWN ADV BEUTI GDMAN LRG CAP INST	E	Dividend	O	T	Buy (add'l)	12/14/22	J		
38.	---BROWN ADV EMG MKTS INS	B	Dividend	M	T	Buy (add'l)	02/28/22	K		
39.						Sold (part)	10/24/22	L		
40.	---BROWN ADV FLEXIBLE EQUITY INST	D	Dividend	N	T	Buy	02/28/22	N		
41.						Buy (add'l)	12/14/22	J		
42.	---BROWN ADV GLOBAL LEADERS INST	B	Dividend	M	T					
43.	---BROWN ADV SM CAP FUNDAMENTAL VALUE	E	Dividend	N	T	Sold (part)	07/22/22	K		
44.						Buy (add'l)	12/14/22	K		
45.	---BROWN ADV SMALL CAP GROWTH INV	E	Dividend	N	T	Buy (add'l)	02/28/22	L		
46.						Buy (add'l)	07/22/22	K		
47.						Buy (add'l)	12/14/22	K		
48.	---BROWN ADV SUSTAINABLE GROWTH	A	Dividend	N	T	Sold (part)	02/28/22	M	F	
49.	---BROWN ADV TOTAL RETURN INS	B	Dividend	M	T	Sold (part)	02/28/22	M	B	
50.						Buy (add'l)	10/24/22	L		
51.	---METROPOLITAN WEST UNCONSTR BOND INDEX	B	Dividend			Sold	06/30/22	L		

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	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000		
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52. ---VANGUARD SHORT TERM BOND INDEX	A	Dividend			Sold	02/28/22	L		
53. ---VANGUARD S/T TREASURY INDEX FUND	A	Dividend	L	T	Buy	06/30/22	L		
54. MERRILL LYNCH BANK DEPOSIT MM/ CASH (ML EDGE)	A	Interest	M	T					
55. INVESTMENT ACCOUNT #3 - (LINES 56-91) (12-MAIN) (H)									
56. ---FIRST AMERICAN GOVT OBLIG MMF/CASH (NOTE 14 IN SECT VIII)	E	Int./Div.	P1	T	Sold (part)	01/31/22	K		
57.					Buy (add'l)	03/30/22	J		
58.					Sold (part)	05/02/22	J		
59.					Buy (add'l)	05/03/22	J		
60.					Buy (add'l)	06/02/22	J		
61.					Buy (add'l)	06/22/22	K		
62.					Buy (add'l)	07/05/22	P1		
63.					Buy (add'l)	07/06/22	J		
64.					Sold (part)	08/01/22	K		
65.					Buy (add'l)	08/02/22	J		
66.					Buy (add'l)	09/02/22	J		
67.					Buy (add'l)	09/09/22	P1		
68.					Sold (part)	09/12/22	P1		

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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	
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69.					Buy (add'l)	10/04/22	J		
70.					Buy (add'l)	10/06/22	J		
71.					Sold (part)	10/31/22	K		
72.					Buy (add'l)	11/02/22	J		
73.					Buy (add'l)	11/04/22	J		
74.					Buy (add'l)	11/21/22	P1		
75.					Sold (part)	11/22/22	P1		
76.					Sold (part)	12/01/22	P1		
77.					Buy (add'l)	12/02/22	J		
78.					Buy (add'l)	12/09/22	P1		
79.					Sold (part)	12/16/22	P1		
80.					Buy (add'l)	12/19/22	K		
81.					Buy (add'l)	12/30/22	K		
82. ---BROWN ADVISORY GLOBAL LEADERS MUTUAL FUND		None			Sold	11/18/22	P1		
83. ---EGERTON INVESTMNT PRTNRS (NOTE 1 IN SECT VIII)		None	P1	T					
84. ---BA GLOBAL HILLHOUSE CHINA VAL FND LLLP (NOTE 1 IN SEC VIII)	E	Distribution	O	T					
85. ---ISHARES MSCI ACWI ETF	E	Dividend	P1	T	Buy	11/18/22	P1		

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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86. ---US TREASURY BILL (INTEREST PAID AT MATURITY IN 2023)		None	P1	T	Buy	11/30/22	P1		
87. ---VANGUARD DIVIDEND GROWTH FUND	G	Dividend	P1	T	Buy (add'l)	03/29/22	L		
88.					Buy (add'l)	12/29/22	L		
89. ---VANGUARD SHORT TERM TAX EXEMPT FUND	D	Dividend			Sold	09/08/22	P1		
90. ---VANGUARD SHORT TERM TREASURY ETF	C	Dividend			Buy	09/08/22	P1		
91.					Sold	11/18/22	P1		
92. INVESTMENT ACCOUNT #4 (MUNI) (LINES 93-219) (H)									
93. ---FIRST AMERICAN GOVT OBLIG MMF/CSH (NOTE 14 IN SECT VIII)	C	Dividend	M	T	Buy (add'l)	01/03/22	N		
94.					Sold (part)	01/13/22	N		
95.					Buy (add'l)	01/28/22	M		
96.					Sold (part)	01/31/22	M		
97.					Buy (add'l)	02/01/22	K		
98.					Buy (add'l)	02/15/22	J		
99.					Buy (add'l)	03/01/22	J		
100.					Buy (add'l)	03/15/22	K		
101.					Sold (part)	03/15/22	M		
102.					Buy (add'l)	04/01/22	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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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)
103.					Buy (add'l)	05/02/22	L	
104.					Sold (part)	05/02/22	L	
105.					Buy (add'l)	05/03/22	J	
106.					Buy (add'l)	05/12/22	J	
107.					Buy (add'l)	05/16/22	K	
108.					Buy (add'l)	06/01/22	M	
109.					Buy (add'l)	06/07/22	J	
110.					Buy (add'l)	06/15/22	J	
111.					Buy (add'l)	06/30/22	J	
112.					Buy (add'l)	07/01/22	K	
113.					Sold (part)	08/01/22	M	
114.					Buy (add'l)	08/15/22	J	
115.					Buy (add'l)	08/17/22	L	
116.					Buy (add'l)	08/19/22	J	
117.					Buy (add'l)	09/01/22	J	
118.					Buy (add'l)	09/15/22	K	
119.					Buy (add'l)	09/23/22	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
Wood, Kimba M.	10/27/2023

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)	
120.					Buy (add'l)	10/03/22	L		
121.					Sold (part)	10/07/22	N		
122.					Buy (add'l)	10/11/22	J		
123.					Buy (add'l)	10/17/22	L		
124.					Sold (part)	10/28/22	J		
125.					Buy (add'l)	10/28/22	J		
126.					Sold (part)	10/31/22	L		
127.					Buy (add'l)	11/02/22	J		
128.					Buy (add'l)	11/04/22	K		
129.					Buy (add'l)	11/07/22	M		
130.					Buy (add'l)	11/08/22	J		
131.					Buy (add'l)	11/14/22	K		
132.					Buy (add'l)	11/15/22	K		
133.					Buy (add'l)	11/25/22	L		
134.					Sold (part)	11/28/22	J		
135.					Buy (add'l)	12/01/22	K		
136.					Buy (add'l)	12/02/22	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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Name of Person Reporting	Date of Report
Wood, Kimba M.	10/27/2023

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.					Buy (add'l)	12/05/22	K		
138.					Buy (add'l)	12/08/22	J		
139.					Sold (part)	12/09/22	N		
140.					Buy (add'l)	12/15/22	J		
141.					Buy (add'l)	12/16/22	P1		
142.					Sold (part)	12/21/22	O		
143.					Sold (part)	12/22/22	O		
144.					Buy (add'l)	12/30/22	J		
145. ---BLACK BELT ENERGY GAS DIST AL DUE 12/1/48	D	Interest	N	T					
146. ---BUFFALO NY SEWER AUTH-GREEN BOND DUE 6/15/24	D	Interest	M	T					
147. ---CHANDLER AZ INDL DEV BOND DUE 12/1/37	C	Interest	M	T					
148. ---CHARLOTTE NC AIRPORT 5% DUE 7/1/49	E	Interest			Sold	10/06/22	N		
149. ---CHICAGO IL O'HARE INTL AIRPORT 5% DUE 1/1/31	D	Interest			Sold	01/01/22	N		
150. ---CLARK COUNTY NV SCH BOND DUE 6/15/32	C	Interest	M	T					
151. ---COMMONWEALTH FINANCING AUTHORITY PA DUE 6/1/23	D	Interest	M	T					
152. ---EDINBURG TX CONSOL BOND DUE 2/15/31	C	Interest	M	T					
153. ---EDINBURG TX CONS INDPT SCH DIST 5% 2/15/2035		None	M	T	Buy	12/20/22	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
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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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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. ---GOLDEN ST TABACCO SECURITIZATION BOND DUE 6/1/30	B	Interest	L	T					
155. ---HEALTHCARE AUTH BAPTIST HEALTH AL DUE 11/15/37	C	Interest	M	T	Sold (part)	11/14/22	K	A	
156. ---HIDALGO CO. TX GO DUE 8/15/35	D	Interest	M	T					
157. ---HOUSTON CO. AL HEALTH CARE AUTH-SE AL MED CENTER 10/1/30	D	Interest			Sold	11/03/22	M		
158. ---HOUSTON TX ARPT SYS BOND DUE 7/1/29	D	Interest			Sold	11/22/22	L		
159. ---ILLINOIS ST FIN AUTH BOND DUE 11/1/30	C	Interest			Sold	08/15/22	L		
160. ---ILLINOIS STATE SALES TAX DUE 6/15/33	D	Interest			Sold	06/03/22	N		
161. ---INDIANA ST FIN AUTH 5/1/24 BOND	B	Interest			Sold	05/02/22	L		
162. ---INDIANA ST FIN AUTH 5/1/22 BOND	A	Interest			Matured	05/01/22	J		
163. ---JACKSONVILLE FL CAPITAL IMPT BOND DUE 10/1/25	C	Interest			Sold	10/01/22	L		
164. ---LOS ANGELES CA DEPT OF AIRPORTS DUE 5/15/34	D	Interest			Sold	04/29/22	M		
165. ---LOS ANGELES CA DEPRT ARPTS BONDS 5% 5/15/2032	D	Interest	M	T	Buy	04/29/22	M		
166. ---LOUISIANA PUB FACS AUTH REV BOND DUE 12/15/31	C	Interest	L	T					
167. ---MD ST COMMUNITY DEV ADMIN DEPT HSG&COMM DEV DUE 9/1/31	C	Interest	M	T					
168. ---MARYLAND ST HEALTH - 7/1/24 BOND	C	Interest	L	T					
169. ---MARYLAND ST HEALTH -7/1/30 BOND	C	Interest	L	T					
170. ---MET TRANSPORTATION NY - 11/15/33 BOND	D	Interest	N	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	
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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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171. ---MET TRANSPORTATION AUTHORITY NY DUE 11/15/37	D	Interest			Sold	10/26/22	N		
172. ---METROPOLITAN TRANS AUTH BY BONDS 5% 11/15/2038	A	Interest	N	T	Buy	10/26/22	N		
173. ---MET WASHGTN DC AIRPORTS AUTH AIRPORT SYSTEMS DUE 10/1/39	D	Interest			Sold	10/31/22	N		
174. ---MET WASHGTN DC AIRPORTS BONDS 5% 10/1/2040		None	N	T	Buy	10/31/22	N		
175. ---MIAMI DADE CNTY FL SCHOOL DIS 5% 3/15/2030	D	Interest	N	T	Buy	01/11/22	N		
176. ---NASSAU CO NY INTERIM FINANCE AUTHORITY DUE 11/15/33	D	Interest			Sold	10/13/22	N		
177. ---NJ ECONOMIC DEV AUTH BONDS 4% 6/15/2039	A	Interest	N	T	Buy	12/07/22	N		
178. ---NJ STATE GO 5% DUE 6/1/29	D	Interest			Sold	11/02/22	N		
179. ---NJ ST TRANS AUTH 0% 12/15/25		None	N	T	Buy	11/02/22	N		
180. ---NEWPORT NEWS VA ECONOMIC DEVELOP AUTH DUE 12/1/38	D	Interest	M	T					
181. ---NEW YORK NY GO 5% DUE 8/1/23	D	Interest	N	T					
182. ---NEW YORK NY GO BDS FISCAL 5% 8/1/2023		None	N	T	Buy	12/20/22	N		
183. ---NEW YORK NY GO 5% SERIES B DUE 8/1/25	D	Interest	N	T					
184. ---NEW YORK NY CITY INDL DEV AGENCY 2.5% 3/1/2037		None	N	T	Buy	12/19/22	N		
185. ---NEW YORK NY TRANSITIONAL FIN AUTHORITY DUE 2/1/31	D	Interest	N	T					
186. ---NY STATE DORM AUTH MEM SLOAN KETT CANCR CTR DUE 7/1/36	D	Interest	M	T					
187. ---NY STATE DORM AUTH 5% 3/15/2032	C	Interest	N	T	Buy	05/10/22	N		

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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188. ---NY ST DORM AUTH GEN PURP BONDS 5% 3/15/2036		None	N	T	Buy	12/19/22	N		
189. ---NY STATE LIBERTY DEV CORP 3% 9/15/2043	C	Interest			Buy	02/17/22	M		
190.					Sold	12/06/22	M		
191. ---NEW YORK ST THRUWAY BOND DUE 1/1/22	B	Interest			Matured	01/01/22	L		
192. ---NEW YORK ST URBAN BOND DUE 3/15/27	D	Interest	M	T					
193. ---NEW YORK ST URBAN DEV CORP 5% 3/15/2029		None	N	T	Buy	10/13/22	N		
194. ---NEW YORK STATE URBAN DEVELOPMENT CORP DUE 3/15/32	D	Interest			Sold	05/10/22	N		
195. ---NEW YORK STATE URBAN DEV CORP SALES TAX DUE 3/15/27	D	Interest			Sold	12/01/22	N		
196. ---NEW YORK LIBERTY DEV CORP BONDS 3.125% 9/15/2050		None	M	T	Buy	12/06/22	M		
197. ---OHIO ST HOSP FAC REV CLEVELAND CLINIC 1/1/2052		None	N	T	Buy	12/21/22	N		
198. ---PALM BEACH CO FL HEALTH FACS AUTH DUE 11/15/32	D	Interest			Sold	11/04/22	M		
199. ---PALM BEACH CNTY FL HEALTH BONDS 5% 11/15/2042	A	Interest	M	T	Buy	11/04/22	M		
200. ---PENNSYLVANIA ST TURNPIKE COMM BOND DUE 12/1/28	C	Interest	L	T					
201. ---PHILADELPHIA PA REF SER A BOND DUE 8/1/26	C	Interest	L	T					
202. ---POMPANO BEACH FL 3.5% DUE 9/1/35	C	Interest			Sold	01/26/22	M	D	
203. ---PORT AUTH OF NY & NJ NY AMT DUE 11/1/37	D	Interest			Sold	10/26/22	M		
204. ---PORT AUTH NY NJ CONSOLIDATED BDS 4% 7/15/2034		None	M	T	Buy	10/26/22	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		
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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)	
205. ---PORT OF CORPUS CHRISTI TX AUTH BOND 12/1/31	C	Interest	M	T					
206. ---RIO HONDO CA COMMUNITY COLLEGE DIST GO DUE 8/1/31		None	M	T					
207. ---SALES TAX SECURITIZATION CORP 5% 1/1/2037		None	N	T	Buy	10/05/22	N		
208. ---SALT LAKE CITY UT ARPT REV SER B 5% 7/1/2042		None	N	T	Buy	10/06/22	N		
209. ---SEATTLE WA MUNI LIGHT PWR REV BOND DUE 1/1/30	C	Interest			Sold	10/13/22	L		
210. ---SOUTH DAKOTA ST EDU BOND DUE 6/1/25	C	Interest	L	T					
211. ---SPRINGFIELD IL ELECTRIC DUE 3/1/26	D	Interest	M	T					
212. ---TOBACCO SETTLEMENT NJ FINANCING CORP DUE 6/1/31	D	Interest			Sold	11/16/22	M		
213. ---TOBACCO SETTLEMENT FING CORP NJ 5% 6/1/2029	A	Interest	M	T	Buy	11/16/22	M		
214. ---TOBACCO SETTLMENT AUTH WA BOND DUE 6/1/22	B	Interest			Matured	06/01/22	L		
215. ---UNIVERSITY IL UNIV REVS AUX BONDS 3% 4/1/2036	C	Interest	M	T	Buy	06/03/22	N		
216. ---UNIVERSITY OF TOLEDO OH DUE 6/1/36	D	Interest	N	T					
217. ---UPPER SANTA CLARA VY JT PWRS AUTH CA		None	M	T	Buy	12/01/22	M		
218. ---WINNEBAGO CNTY IL REF SER C BOND DUE 12/30/26	C	Interest	L	T					
219. ---YAKIMA & KITTITAS CNTYS WA GO DUE 12/1/29	D	Interest	N	T					
220. INV ACCT #6 (SCG) (LINES 221-867) (H)									
221. ---FIRST AMERICN GOVT OBLGTNS (MMF)/CSH (NOTE 14 IN SECT VIII)	C	Dividend	M	T	Buy (add'l)	01/05/22	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
Wood, Kimba M.	10/27/2023

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)
222.					Buy (add'l)	01/06/22	J	
223.					Sold (part)	01/07/22	J	
224.					Buy (add'l)	01/11/22	J	
225.					Buy (add'l)	01/12/22	J	
226.					Sold (part)	01/24/22	J	
227.					Sold (part)	01/25/22	J	
228.					Buy (add'l)	01/26/22	J	
229.					Sold (part)	02/01/22	J	
230.					Buy (add'l)	02/03/22	J	
231.					Sold (part)	02/09/22	J	
232.					Buy (add'l)	02/11/22	J	
233.					Sold (part)	02/15/22	J	
234.					Buy (add'l)	02/16/22	J	
235.					Buy (add'l)	02/17/22	K	
236.					Buy (add'l)	02/18/22	J	
237.					Sold (part)	02/22/22	J	
238.					Sold (part)	02/23/22	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
Wood, Kimba M.	10/27/2023

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)	
239.					Sold (part)	02/24/22	J		
240.					Sold (part)	02/25/22	J		
241.					Sold (part)	03/01/22	J		
242.					Sold (part)	03/04/22	J		
243.					Sold (part)	03/07/22	J		
244.					Sold (part)	03/08/22	J		
245.					Sold (part)	03/10/22	J		
246.					Sold (part)	03/11/22	J		
247.					Sold (part)	03/15/22	J		
248.					Buy (add'l)	03/17/22	J		
249.					Sold (part)	03/21/22	J		
250.					Sold (part)	03/22/22	J		
251.					Buy (add'l)	03/28/22	J		
252.					Buy (add'l)	03/29/22	J		
253.					Buy (add'l)	03/30/22	J		
254.					Buy (add'l)	03/31/22	J		
255.					Sold (part)	04/01/22	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
Wood, Kimba M.	10/27/2023

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)	
256.					Buy (add'l)	04/06/22	J		
257.					Buy (add'l)	04/07/22	J		
258.					Buy (add'l)	04/08/22	J		
259.					Buy (add'l)	04/14/22	J		
260.					Buy (add'l)	04/18/22	J		
261.					Buy (add'l)	04/19/22	J		
262.					Buy (add'l)	04/20/22	J		
263.					Buy (add'l)	04/21/22	J		
264.					Buy (add'l)	04/25/22	J		
265.					Buy (add'l)	04/26/22	K		
266.					Buy (add'l)	04/27/22	J		
267.					Sold (part)	05/03/22	J		
268.					Buy (add'l)	05/04/22	J		
269.					Buy (add'l)	05/05/22	J		
270.					Sold (part)	05/06/22	J		
271.					Sold (part)	05/09/22	J		
272.					Sold (part)	05/10/22	K		

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
Wood, Kimba M.	10/27/2023

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)	
273.					Sold (part)	05/11/22	K		
274.					Sold (part)	05/12/22	J		
275.					Sold (part)	05/13/22	K		
276.					Sold (part)	05/16/22	J		
277.					Sold (part)	05/17/22	J		
278.					Sold (part)	05/19/22	J		
279.					Buy (add'l)	05/19/22	K		
280.					Sold (part)	05/20/22	K		
281.					Sold (part)	05/23/22	J		
282.					Buy (add'l)	05/24/22	K		
283.					Sold (part)	05/24/22	J		
284.					Sold (part)	05/25/22	J		
285.					Sold (part)	05/26/22	J		
286.					Sold (part)	05/31/22	J		
287.					Sold (part)	06/01/22	J		
288.					Sold (part)	06/02/22	J		
289.					Sold (part)	06/03/22	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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Name of Person Reporting	Date of Report
Wood, Kimba M.	10/27/2023

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)	
290.					Sold (part)	06/06/22	J		
291.					Sold (part)	06/07/22	J		
292.					Sold (part)	06/08/22	J		
293.					Buy (add'l)	06/10/22	J		
294.					Buy (add'l)	06/13/22	J		
295.					Sold (part)	06/14/22	J		
296.					Sold (part)	06/15/22	J		
297.					Buy (add'l)	06/16/22	J		
298.					Buy (add'l)	06/17/22	J		
299.					Sold (part)	06/21/22	J		
300.					Sold (part)	06/22/22	J		
301.					Sold (part)	06/24/22	J		
302.					Buy (add'l)	06/28/22	J		
303.					Buy (add'l)	07/07/22	K		
304.					Buy (add'l)	07/11/22	J		
305.					Sold (part)	07/12/22	J		
306.					Sold (part)	07/13/22	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
Wood, Kimba M.	10/27/2023

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)	
307.					Sold (part)	07/14/22	J		
308.					Sold (part)	07/15/22	J		
309.					Buy (add'l)	07/28/22	J		
310.					Buy (add'l)	07/29/22	J		
311.					Sold (part)	08/01/22	J		
312.					Sold (part)	08/02/22	J		
313.					Buy (add'l)	08/03/22	J		
314.					Sold (part)	08/04/22	J		
315.					Buy (add'l)	08/05/22	J		
316.					Sold (part)	08/08/22	J		
317.					Buy (add'l)	08/09/22	J		
318.					Buy (add'l)	08/10/22	J		
319.					Sold (part)	08/11/22	J		
320.					Sold (part)	08/12/22	J		
321.					Sold (part)	08/19/22	J		
322.					Sold (part)	08/23/22	J		
323.					Buy (add'l)	08/25/22	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
Wood, Kimba M.	10/27/2023

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)	
324.					Buy (add'l)	08/26/22	J		
325.					Sold (part)	08/29/22	J		
326.					Sold (part)	08/30/22	J		
327.					Sold (part)	08/31/22	J		
328.					Buy (add'l)	09/02/22	J		
329.					Buy (add'l)	09/06/22	J		
330.					Sold (part)	09/07/22	J		
331.					Sold (part)	09/08/22	J		
332.					Sold (part)	09/09/22	J		
333.					Sold (part)	09/12/22	J		
334.					Sold (part)	09/13/22	J		
335.					Sold (part)	09/14/22	J		
336.					Sold (part)	09/15/22	J		
337.					Buy (add'l)	09/15/22	L		
338.					Sold (part)	09/16/22	J		
339.					Sold (part)	09/19/22	J		
340.					Sold (part)	09/20/22	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
Wood, Kimba M.	10/27/2023

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)	
341.					Sold (part)	09/27/22	J		
342.					Sold (part)	09/28/22	J		
343.					Sold (part)	09/29/22	J		
344.					Sold (part)	09/30/22	K		
345.					Sold (part)	10/04/22	J		
346.					Buy (add'l)	10/06/22	K		
347.					Sold (part)	10/06/22	J		
348.					Buy (add'l)	10/07/22	J		
349.					Sold (part)	10/11/22	J		
350.					Buy (add'l)	10/12/22	J		
351.					Buy (add'l)	10/17/22	K		
352.					Sold (part)	10/18/22	J		
353.					Buy (add'l)	10/19/22	J		
354.					Sold (part)	10/25/22	J		
355.					Buy (add'l)	10/26/22	J		
356.					Buy (add'l)	10/27/22	J		
357.					Buy (add'l)	10/28/22	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
Wood, Kimba M.	10/27/2023

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)	
358.					Buy (add'l)	10/31/22	J		
359.					Sold (part)	11/01/22	J		
360.					Sold (part)	11/03/22	J		
361.					Sold (part)	11/04/22	J		
362.					Sold (part)	11/07/22	J		
363.					Sold (part)	11/08/22	J		
364.					Buy (add'l)	11/10/22	J		
365.					Buy (add'l)	11/15/22	J		
366.					Buy (add'l)	11/16/22	J		
367.					Sold (part)	11/17/22	K		
368.					Sold (part)	11/18/22	J		
369.					Buy (add'l)	11/22/22	J		
370.					Buy (add'l)	11/23/22	J		
371.					Buy (add'l)	11/28/22	J		
372.					Buy (add'l)	11/29/22	J		
373.					Buy (add'l)	11/30/22	J		
374.					Buy (add'l)	12/02/22	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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Name of Person Reporting	Date of Report
Wood, Kimba M.	10/27/2023

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)	
375.					Sold (part)	12/06/22	J		
376.					Sold (part)	12/07/22	J		
377.					Sold (part)	12/08/22	J		
378.					Sold (part)	12/14/22	J		
379.					Sold (part)	12/19/22	J		
380.					Sold (part)	12/20/22	J		
381.					Sold (part)	12/21/22	J		
382.					Buy (add'l)	12/22/22	J		
383.					Sold (part)	12/23/22	J		
384.					Sold (part)	12/27/22	J		
385.					Sold (part)	12/29/22	J		
386.					Sold (part)	12/30/22	J		
387. COMMON STOCKS (SCG)(LINES 388-867)(H)									
388. ---ABCAM PLC		None	K	T	Buy (add'l)	10/10/22	J		
389.					Buy (add'l)	12/12/22	J		
390. ---ACCOLADE INC		None	K	T	Buy (add'l)	01/20/22	J		
391.					Buy (add'l)	02/03/22	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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Name of Person Reporting	Date of Report
Wood, Kimba M.	10/27/2023

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)	
392.					Buy (add'l)	02/07/22	J		
393.					Buy (add'l)	03/04/22	J		
394.					Buy (add'l)	05/06/22	J		
395.					Buy (add'l)	05/11/22	J		
396.					Sold (part)	10/04/22	J		
397.					Sold (part)	10/05/22	J		
398. ---AGILON HEALTH INC		None	K	T	Buy (add'l)	12/22/22	J		
399. ---ALIGNMENT HEALTHCARE INC		None	K	T					
400. ---ANGI HOMESERVICES INC		None	J	T	Buy (add'l)	02/18/22	J		
401.					Buy (add'l)	02/23/22	J		
402.					Buy (add'l)	02/25/22	J		
403.					Buy (add'l)	03/09/22	J		
404.					Sold (part)	10/14/22	J		
405. ---ARVINAS INC		None	J	T	Buy	05/12/22	J		
406.					Buy (add'l)	05/16/22	J		
407.					Buy (add'l)	05/18/22	J		
408. ---ASCENDIS PHARMA		None	K	T	Buy (add'l)	05/06/22	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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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	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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409.					Buy (add'l)	05/09/22	J		
410.					Sold (part)	10/24/22	J		
411.					Sold (part)	10/25/22	J		
412.					Sold (part)	10/26/22	J		
413. ---THE AZEK CO INC		None	K	T	Sold (part)	03/25/22	J		
414.					Sold (part)	03/28/22	J		
415.					Sold (part)	06/15/22	J		
416.					Sold (part)	08/03/22	J		
417. ---AZENTA INC		None	K	T	Buy	05/26/22	J		
418.					Buy (add'l)	05/31/22	J		
419.					Buy (add'l)	06/01/22	J		
420.					Buy (add'l)	06/03/22	J		
421.					Buy (add'l)	06/09/22	J		
422.					Buy (add'l)	06/17/22	J		
423.					Buy (add'l)	07/06/22	J		
424.					Buy (add'l)	07/13/22	J		
425.					Buy (add'l)	08/02/22	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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	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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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	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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426.					Buy (add'l)	08/04/22	J		
427.					Buy (add'l)	08/08/22	J		
428.					Buy (add'l)	08/10/22	J		
429.					Buy (add'l)	08/23/22	J		
430.					Buy (add'l)	09/14/22	J		
431.					Buy (add'l)	09/15/22	J		
432.					Buy (add'l)	09/16/22	J		
433. ---BENTLEY SYS INC	A	Dividend	K	T	Buy	05/12/22	J		
434.					Buy (add'l)	05/13/22	J		
435.					Buy (add'l)	05/16/22	J		
436.					Buy (add'l)	05/17/22	J		
437.					Buy (add'l)	05/18/22	J		
438.					Buy (add'l)	05/19/22	J		
439.					Buy (add'l)	05/31/22	J		
440.					Buy (add'l)	12/28/22	J		
441. ---BIOHAVEN LTD		None	J	T	Buy	10/04/22	J		
442. ---BIOHAVEN PHARMACEUTICAL HOLDING CO LTD	B	Dividend			Sold (part)	04/29/22	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
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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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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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443.					Sold	10/04/22	K	E	
444. ---BLACKLINE, INC		None	K	T	Buy (add'l)	02/14/22	J		
445.					Buy (add'l)	02/15/22	J		
446.					Buy (add'l)	02/16/22	J		
447.					Buy (add'l)	02/17/22	J		
448.					Buy (add'l)	02/18/22	J		
449.					Buy (add'l)	02/25/22	J		
450.					Buy (add'l)	05/09/22	J		
451.					Buy (add'l)	05/10/22	J		
452.					Buy (add'l)	05/11/22	J		
453. ---BLUEPRINT MEDICINES CORP		None	J	T	Buy (add'l)	05/05/22	J		
454.					Sold (part)	10/21/22	J		
455.					Sold (part)	10/24/22	J		
456.					Sold (part)	10/25/22	J		
457.					Sold (part)	10/26/22	J		
458.					Sold (part)	10/27/22	J		
459. ---BRIGHT HORIZONS FAMILY SOLUTION, INC		None	L	T	Buy (add'l)	02/18/22	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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460.					Buy (add'l)	02/22/22	J		
461.					Buy (add'l)	02/23/22	J		
462.					Buy (add'l)	05/04/22	J		
463.					Buy (add'l)	05/05/22	J		
464.					Buy (add'l)	05/06/22	J		
465.					Buy (add'l)	05/09/22	J		
466.					Buy (add'l)	05/11/22	J		
467.					Sold (part)	08/01/22	J		
468.					Sold (part)	08/02/22	J		
469.					Buy (add'l)	11/07/22	J		
470.					Buy (add'l)	11/08/22	J		
471.					Buy (add'l)	11/09/22	J		
472.					Buy (add'l)	11/28/22	J		
473.					Buy (add'l)	11/29/22	J		
474.					Buy (add'l)	12/12/22	J		
475.					Buy (add'l)	12/15/22	J		
476.					Buy (add'l)	12/21/22	J		

1 Income Gain Codes: (See Columns B1 and D4)
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477.					Buy (add'l)	12/28/22	J		
478. ---BRUKER CORPORATION	A	Dividend	K	T	Buy (add'l)	05/05/22	J		
479.					Buy (add'l)	05/06/22	J		
480.					Buy (add'l)	05/09/22	J		
481. ---CACTUS, INC	A	Dividend	K	T					
482. ---CASELLA WASTE SYSTEMS INC		None	J	T	Buy	06/09/22	J		
483.					Buy (add'l)	06/10/22	J		
484.					Buy (add'l)	06/13/22	J		
485.					Buy (add'l)	06/14/22	J		
486. ---CASEY'S GENERAL STORES, INC	A	Dividend	L	T	Sold (part)	12/02/22	J	A	
487.					Sold (part)	12/06/22	J	A	
488. ---CATALENT, INC		None			Sold (part)	01/07/22	J	C	
489.					Sold (part)	01/10/22	J	C	
490.					Sold (part)	04/12/22	J	C	
491.					Sold (part)	04/13/22	J	C	
492.					Sold (part)	04/14/22	J	C	
493.					Sold (part)	04/18/22	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
Wood, Kimba M.	10/27/2023

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)	
494.					Sold (part)	04/19/22	J	B	
495.					Sold (part)	04/21/22	J	C	
496.					Sold (part)	04/22/22	J	D	
497.					Sold (part)	06/08/22	J	C	
498.					Sold (part)	06/09/22	J	C	
499.					Sold	07/06/22	J	A	
500. ---CHAMPIONX CORP	A	Dividend	L	T	Buy	05/26/22	J		
501.					Buy (add'l)	05/27/22	J		
502.					Buy (add'l)	05/31/22	J		
503.					Buy (add'l)	06/02/22	J		
504.					Buy (add'l)	06/07/22	J		
505.					Buy (add'l)	06/09/22	J		
506.					Buy (add'l)	06/10/22	J		
507.					Buy (add'l)	06/16/22	J		
508.					Buy (add'l)	06/17/22	J		
509.					Buy (add'l)	07/11/22	J		
510.					Buy (add'l)	08/01/22	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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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	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)	
511.					Buy (add'l)	08/02/22	J		
512.					Buy (add'l)	08/04/22	J		
513.					Buy (add'l)	09/23/22	J		
514.					Buy (add'l)	10/14/22	J		
515.					Buy (add'l)	10/17/22	J		
516.					Buy (add'l)	10/18/22	J		
517.					Buy (add'l)	12/21/22	J		
518. ---CHARLES RIVER LABORATORIES INTERNATIONAL, INC		None	J	T	Sold (part)	01/07/22	J	B	
519.					Sold (part)	01/10/22	J	C	
520.					Sold (part)	02/14/22	J	D	
521.					Sold (part)	02/15/22	K	E	
522.					Sold (part)	02/16/22	J	D	
523.					Sold (part)	06/09/22	J	C	
524. ---CHOICE HOTELS INTERNATIONAL, INC	A	Dividend	K	T					
525. ---CHURCHILL DOWNS	A	Dividend	K	T	Buy (add'l)	01/20/22	J		
526.					Buy (add'l)	01/21/22	J		
527.					Sold (part)	10/26/22	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)
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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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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)	
528. ---CLARUS CORP	A	Dividend	J	T	Buy (add'l)	09/01/22	J		
529.					Buy (add'l)	09/02/22	J		
530.					Buy (add'l)	09/15/22	J		
531.					Buy (add'l)	09/28/22	J		
532. ---CMC MATLS INC	A	Dividend			Sold	07/06/22	K	E	
533. ---COGENT COMMUNICATIONS GROUP, INC	B	Dividend	K	T	Sold (part)	04/11/22	J		
534.					Sold (part)	04/19/22	J		
535.					Sold (part)	04/21/22	J		
536.					Sold (part)	04/25/22	J		
537. ---COUCHBASE INC (SEE NOTE 25 IN SECT VIII)		None			Sold (part)	06/09/22	J		
538.					Sold (part)	06/24/22	J		
539. DENBURY INC		None	K	T	Buy	09/06/22	J		
540.					Buy (add'l)	09/07/22	J		
541.					Buy (add'l)	09/08/22	J		
542.					Buy (add'l)	09/12/22	J		
543.					Buy (add'l)	09/14/22	J		
544.					Buy (add'l)	09/15/22	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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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	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)	
545.					Buy (add'l)	09/23/22	J		
546.					Buy (add'l)	09/27/22	J		
547.					Buy (add'l)	10/14/22	J		
548.					Buy (add'l)	10/26/22	J		
549.					Buy (add'l)	11/07/22	J		
550.					Buy (add'l)	11/15/22	J		
551.					Buy (add'l)	11/16/22	J		
552.					Buy (add'l)	12/02/22	J		
553.					Buy (add'l)	12/12/22	J		
554.					Buy (add'l)	12/21/22	J		
555. ---DIGITALBRIDGE GROUP INC	A	Dividend	J	T					
556. ---DYNATRACE HOLDINGS LLC		None	K	T	Buy (add'l)	05/09/22	J		
557.					Buy (add'l)	05/19/22	J		
558.					Buy (add'l)	05/20/22	J		
559.					Buy (add'l)	05/23/22	J		
560.					Buy (add'l)	08/04/22	J		
561. ---EASTGROUP PROPERTIES INC	B	Dividend	K	T	Sold (part)	05/02/22	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		
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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.)*

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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				
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562.					Sold (part)	05/03/22	J	A	
563.					Sold (part)	05/04/22	J	B	
564.					Buy (add'l)	11/15/22	J		
565. ---ENCOMPASS HEALTH CORP	A	Dividend	K	T	Buy (add'l)	08/02/22	J		
566.					Buy (add'l)	08/04/22	J		
567.					Buy (add'l)	08/05/22	J		
568.					Buy (add'l)	12/21/22	J		
569. ---ENHABIT, INC		None			Spinoff (from line 565)	07/01/22	J		
570.					Sold (part)	07/07/22	J		
571.					Sold	07/11/22	J		
572. ---ENTEGRIS INC	A	Dividend	K	T	Sold (part)	04/05/22	J	B	
573.					Sold (part)	04/06/22	J	B	
574. ---ENVESTNET INC		None	K	T	Sold (part)	01/21/22	J		
575.					Sold (part)	01/24/22	J		
576.					Buy (add'l)	05/09/22	J		
577.					Buy (add'l)	05/10/22	J		
578.					Buy (add'l)	05/11/22	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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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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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)	
579.					Buy (add'l)	05/12/22	J		
580.					Buy (add'l)	05/13/22	J		
581.					Buy (add'l)	05/16/22	J		
582.					Buy (add'l)	05/17/22	J		
583.					Buy (add'l)	05/20/22	J		
584. ---ESTABLISHMENT LABS HOLDINGS		None	K	T	Sold (part)	11/04/22	J	A	
585.					Sold (part)	11/07/22	J	A	
586. ---EVO PAYMENTS HOLDINGS, INC		None	L	T	Sold (part)	08/23/22	J	A	
587.					Sold (part)	08/26/22	J	A	
588.					Sold (part)	12/20/22	J	B	
589.					Sold (part)	12/21/22	K	C	
590. ---FATE THERAPEUTICS INC (SEE NOTE 25 IN SECT VIII)		None			Buy (add'l)	01/04/22	J		
591.					Buy (add'l)	01/05/22	J		
592.					Buy (add'l)	10/26/22	J		
593.					Sold (part)	12/27/22	J		
594. ---FIRST WATCH RESTAURANT GROUP		None	J	T					
595. ---FTI CONSULTING INC		None	K	T	Sold (part)	06/24/22	J	C	

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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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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596.					Sold (part)	07/26/22	J	A	
597.					Sold (part)	07/27/22	J	B	
598.					Sold (part)	10/24/22	J	A	
599.					Sold (part)	10/25/22	J	A	
600.					Sold (part)	10/26/22	J	C	
601. ---FULLER H B CO	A	Dividend	L	T	Buy (add'l)	08/08/22	J		
602.					Buy (add'l)	08/09/22	J		
603. ---GENPACT LTD	B	Dividend	L	T	Sold (part)	02/01/22	J	A	
604.					Sold (part)	02/10/22	J	A	
605.					Buy (add'l)	05/09/22	J		
606.					Buy (add'l)	05/10/22	J		
607.					Buy (add'l)	05/11/22	J		
608.					Sold (part)	10/24/22	J	A	
609.					Sold (part)	10/25/22	J	A	
610.					Sold (part)	10/26/22	J	A	
611.					Sold (part)	11/08/22	J	A	
612.					Sold (part)	11/09/22	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		
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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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613. ---HEALTHEQUITY, INC		None	K	T	Buy (add'l)	08/01/22	J		
614.					Buy (add'l)	08/02/22	J		
615.					Sold (part)	10/24/22	J		
616. ---IAA, INC (FKA IAA SPINCO, INC)		None	K	T	Buy (add'l)	05/11/22	J		
617.					Buy (add'l)	05/12/22	J		
618.					Buy (add'l)	05/13/22	J		
619.					Buy (add'l)	05/18/22	J		
620.					Sold (part)	11/07/22	J		
621.					Sold (part)	11/08/22	J		
622.					Sold (part)	11/10/22	J		
623.					Sold (part)	11/11/22	J		
624.					Sold (part)	11/14/22	J		
625.					Sold (part)	11/16/22	J		
626.					Sold (part)	11/17/22	J		
627.					Sold (part)	11/18/22	J		
628.					Sold (part)	11/21/22	J		
629.					Sold (part)	11/22/22	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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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	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)	
630.					Sold (part)	11/23/22	J		
631.					Sold (part)	11/25/22	J		
632.					Sold (part)	11/28/22	J		
633.					Sold (part)	11/29/22	J		
634.					Sold (part)	11/30/22	J		
635. ---IDEX CORP	A	Dividend	K	T					
636. ---INARI MED INC		None	K	T	Buy (add'l)	02/25/22	J		
637.					Buy (add'l)	05/06/22	J		
638.					Buy (add'l)	05/09/22	J		
639.					Buy (add'l)	05/10/22	J		
640.					Buy (add'l)	05/20/22	J		
641.					Buy (add'l)	11/15/22	J		
642.					Buy (add'l)	12/27/22	J		
643. ---INFINERA CORP		None	K	T	Buy (add'l)	05/20/22	J		
644. ---JOHN BEAN TECHNOLOGIES CORP	A	Dividend	K	T	Buy (add'l)	04/29/22	J		
645.					Buy (add'l)	05/06/22	J		
646.					Buy (add'l)	05/09/22	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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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)	
647.					Buy (add'l)	06/17/22	J		
648. ---KARUNA THERAPEUTICS INC		None	K	T	Buy	07/27/22	J		
649.					Buy (add'l)	07/28/22	J		
650.					Buy (add'l)	08/01/22	J		
651.					Buy (add'l)	08/04/22	J		
652.					Buy (add'l)	08/10/22	J		
653.					Buy (add'l)	09/23/22	J		
654.					Buy (add'l)	09/27/22	J		
655.					Buy (add'l)	10/26/22	J		
656. ---KNIGHT-SWIFT TRANSPORTATION HOLDINGS, INC	A	Dividend	K	T	Sold (part)	04/01/22	J	A	
657.					Sold (part)	04/04/22	J	A	
658.					Sold (part)	04/05/22	J	A	
659. ---LATTICE SEMICONDUCTOR CORP		None	K	T	Sold (part)	01/03/22	J	C	
660.					Sold (part)	01/04/22	J	A	
661.					Sold (part)	01/05/22	J	B	
662.					Sold (part)	02/10/22	J	B	
663.					Buy (add'l)	05/06/22	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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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	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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664. ---LESLIES INC		None	J	T	Sold (part)	05/27/22	J		
665.					Sold (part)	06/01/22	J		
666.					Sold (part)	06/07/22	J		
667.					Sold (part)	06/08/22	J		
668.					Sold (part)	06/15/22	J		
669.					Sold (part)	06/16/22	J		
670.					Sold (part)	10/17/22	J		
671.					Sold (part)	11/28/22	J		
672. ---LITTELFUSE, INC	A	Distribution	K	T	Sold (part)	08/01/22	J	A	
673.					Sold (part)	08/02/22	J	B	
674. ---MAKEMYTRIP LTD		None	K	T	Buy (add'l)	01/27/22	J		
675.					Buy (add'l)	05/04/22	J		
676.					Buy (add'l)	05/05/22	J		
677.					Buy (add'l)	05/20/22	J		
678.					Sold (part)	08/30/22	J	A	
679.					Sold (part)	08/31/22	J	A	
680.					Sold (part)	09/01/22	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
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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	
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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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681.					Sold (part)	09/02/22	J	A	
682.					Sold (part)	09/07/22	J	A	
683.					Sold (part)	10/25/22	J	A	
684. ---MANTECH INTL CORP	A	Dividend			Buy (add'l)	05/06/22	J		
685.					Sold	09/15/22	L	D	
686. ---MIMECAST, LTD		None			Sold	05/19/22	K	E	
687. ---MISTER CARWASH INC		None	K	T	Buy	08/25/22	J		
688.					Buy (add'l)	08/26/22	J		
689.					Buy (add'l)	08/29/22	J		
690.					Buy (add'l)	08/30/22	J		
691.					Buy (add'l)	09/02/22	J		
692.					Buy (add'l)	09/07/22	J		
693.					Buy (add'l)	09/08/22	J		
694.					Buy (add'l)	09/09/22	J		
695.					Buy (add'l)	09/12/22	J		
696.					Buy (add'l)	09/13/22	J		
697.					Buy (add'l)	09/14/22	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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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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698.					Buy (add'l)	09/15/22	J		
699.					Buy (add'l)	11/15/22	J		
700.					Buy (add'l)	12/06/22	J		
701.					Buy (add'l)	12/21/22	J		
702. ---MSA SAFETY, INC	A	Dividend	K	T	Buy (add'l)	04/29/22	J		
703.					Buy (add'l)	05/11/22	J		
704.					Buy (add'l)	08/02/22	J		
705. ---NATERA INC		None			Buy (add'l)	01/03/22	J		
706.					Buy (add'l)	01/28/22	J		
707.					Buy (add'l)	02/18/22	J		
708.					Buy (add'l)	02/22/22	J		
709.					Sold	03/15/22	J		
710. ---NATIONAL VISION HOLDINGS, INC		None			Sold (part)	02/02/22	J	A	
711.					Sold (part)	02/10/22	J	A	
712.					Sold (part)	06/14/22	J		
713.					Sold	06/15/22	J	A	
714. ---NEOGENOMICS, INC		None	K	T	Buy (add'l)	03/25/22	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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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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715.					Buy (add'l)	03/28/22	J		
716.					Buy (add'l)	03/29/22	J		
717.					Buy (add'l)	03/31/22	J		
718.					Buy (add'l)	04/05/22	J		
719.					Buy (add'l)	05/06/22	J		
720.					Buy (add'l)	12/15/22	J		
721. ---NEUROCRINE BIOSCIENCES, INC		None	L	T	Buy (add'l)	05/09/22	J		
722. ---NEVRO CORP		None	J	T	Buy (add'l)	02/25/22	J		
723.					Sold (part)	10/14/22	J		
724. ---OAK STR HEALTH INC		None			Sold (part)	01/31/22	J		
725.					Sold	02/01/22	J		
726. ---ORTHOPEDIATRICS CORP		None	K	T	Buy (add'l)	05/09/22	J		
727.					Buy (add'l)	05/11/22	J		
728. ---PHREESIA, INC		None	K	T	Buy (add'l)	06/03/22	J		
729.					Buy (add'l)	08/02/22	J		
730. --PINTEREST INC		None	K	T	Buy	09/27/22	J		
731.					Buy (add'l)	09/28/22	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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	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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732.					Buy (add'l)	09/30/22	J		
733.					Buy (add'l)	10/06/22	J		
734.					Buy (add'l)	10/24/22	J		
735.					Buy (add'l)	10/28/22	J		
736.					Buy (add'l)	11/02/22	J		
737.					Buy (add'l)	11/03/22	J		
738.					Buy (add'l)	11/04/22	J		
739.					Buy (add'l)	12/06/22	J		
740.					Buy (add'l)	12/12/22	J		
741. ---POWER INTEGRATIONS INC	A	Dividend	K	T	Buy	02/07/22	J		
742.					Buy (add'l)	02/11/22	J		
743.					Buy (add'l)	02/14/22	J		
744.					Buy (add'l)	02/23/22	J		
745.					Buy (add'l)	02/25/22	J		
746.					Buy (add'l)	03/03/22	J		
747.					Buy (add'l)	03/09/22	J		
748.					Buy (add'l)	05/09/22	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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	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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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)	
749.					Buy (add'l)	08/09/22	J		
750.					Buy (add'l)	08/17/22	J		
751.					Buy (add'l)	08/19/22	J		
752.					Buy (add'l)	08/22/22	J		
753.					Buy (add'l)	08/26/22	J		
754.					Buy (add'l)	08/29/22	J		
755. ---PROGYNY INC		None			Sold (part)	08/04/22	J	A	
756.					Sold	08/05/22	J	B	
757. ---PROS HOLDINGS, INC		None	K	T	Buy (add'l)	12/22/22	J		
758. ---PROSPERITY BANCSHARES, INC	B	Dividend	L	T	Buy (add'l)	01/05/22	J		
759.					Sold (part)	03/03/22	J		
760.					Sold (part)	03/04/22	J		
761. ---QUAKER CHEM CORP (FKA QUAKER HOUGHTON)	A	Dividend	K	T	Buy (add'l)	06/06/22	J		
762. ---RENTOKIL INITIAL PLC		None	K	T	Buy	10/26/22	J		
763.					Buy (add'l)	10/27/22	J		
764.					Buy (add'l)	10/28/22	J		
765.					Buy (add'l)	11/01/22	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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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				
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766.					Buy (add'l)	11/07/22	J		
767.					Buy (add'l)	11/08/22	J		
768.					Buy (add'l)	11/15/22	J		
769.					Buy (add'l)	11/17/22	J		
770.					Buy (add'l)	12/05/22	J		
771.					Buy (add'l)	12/06/22	J		
772.					Buy (add'l)	12/16/22	J		
773.					Buy (add'l)	12/21/22	J		
774. ---SI BONE INC		None	K	T	Buy (add'l)	05/10/22	J		
775. ---SIMPLY GOOD FOODS COMPANY		None	K	T	Sold (part)	04/05/22	J	B	
776.					Sold (part)	04/06/22	J	A	
777.					Buy (add'l)	10/24/22	J		
778. ---SITEONE LANDSCAPE SUPPLY, INC		None	J	T	Sold (part)	01/03/22	J	C	
779.					Sold (part)	01/04/22	J	C	
780.					Sold (part)	01/07/22	J	A	
781.					Sold (part)	03/24/22	J	B	
782.					Sold (part)	03/25/22	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
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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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783.					Sold (part)	03/28/22	J	B	
784.					Sold (part)	03/29/22	J	C	
785. ---SPDR S&P BIOTECH ETF		None	L	T	Buy	09/28/22	K		
786.					Buy (add'l)	09/30/22	J		
787.					Buy (add'l)	10/04/22	J		
788.					Buy (add'l)	10/06/22	J		
789.					Buy (add'l)	10/14/22	J		
790.					Buy (add'l)	10/21/22	J		
791.					Buy (add'l)	10/26/22	J		
792.					Buy (add'l)	11/15/22	J		
793.					Buy (add'l)	12/02/22	J		
794.					Buy (add'l)	12/12/22	J		
795.					Buy (add'l)	12/21/22	J		
796.					Buy (add'l)	12/27/22	J		
797. ---SUMO LOGIC INC		None	J	T					
798. ---TAKE-TWO INTERACTIVE SOFTWARE INC (RECVD SH FROM ZYNGA MERGER)		None	K	T	Sold (part)	08/04/22	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
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799.					Sold (part)	08/08/22	J	A	
800.					Sold (part)	10/26/22	J	A	
801.					Sold (part)	10/27/22	J	A	
802.					Buy (add'l)	11/15/22	J		
803.					Buy (add'l)	12/02/22	J		
804.					Buy (add'l)	12/12/22	J		
805. ---TELEFLEX INC	A	Dividend	J	T	Buy	05/12/22	J		
806.					Buy (add'l)	05/13/22	J		
807.					Buy (add'l)	05/17/22	J		
808.					Buy (add'l)	05/18/22	J		
809.					Buy (add'l)	05/19/22	J		
810.					Buy (add'l)	05/26/22	J		
811.					Buy (add'l)	05/27/22	J		
812.					Buy (add'l)	06/01/22	J		
813.					Buy (add'l)	06/03/22	J		
814.					Buy (add'l)	06/16/22	J		
815.					Buy (add'l)	09/27/22	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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816.					Sold (part)	10/04/22	J		
817.					Sold (part)	10/05/22	J		
818.					Sold (part)	10/06/22	J		
819.					Sold (part)	10/07/22	J		
820.					Sold (part)	10/10/22	J		
821.					Sold (part)	10/17/22	J		
822.					Sold (part)	10/18/22	J		
823. ---TERMINIX GLOBAL HOLDINGS		None			Buy (add'l)	01/20/22	J		
824.					Buy (add'l)	01/21/22	J		
825.					Buy (add'l)	01/31/22	J		
826.					Buy (add'l)	02/01/22	J		
827.					Buy (add'l)	02/10/22	J		
828.					Buy (add'l)	05/10/22	J		
829.					Sold	10/14/22	K		
830. ---TOPBUILD CORP		None	K	T	Sold (part)	01/03/22	J	B	
831.					Sold (part)	01/04/22	J	B	
832.					Sold (part)	03/24/22	J	C	

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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833.					Sold (part)	03/25/22	J	B	
834.					Sold (part)	03/28/22	J	B	
835.					Sold (part)	11/28/22	J	A	
836. ---VALMONT INDS INC	A	Dividend	K	T	Buy (add'l)	04/29/22	J		
837.					Buy (add'l)	07/08/22	J		
838.					Buy (add'l)	07/11/22	J		
839. ---VIZIO HLDG CORP		None	J	T	Buy	12/19/22	J		
840. ---WASTE CONNECTIONS INC	A	Dividend	L	T					
841. ---WEX, INC		None	K	T	Buy (add'l)	04/29/22	J		
842.					Buy (add'l)	11/15/22	J		
843.					Buy (add'l)	12/15/22	J		
844.					Buy (add'l)	12/21/22	J		
845. ---WOODWARD, INC	A	Dividend	K	T	Buy (add'l)	05/26/22	J		
846.					Buy (add'l)	12/02/22	J		
847.					Buy (add'l)	12/05/22	J		
848.					Buy (add'l)	12/06/22	J		
849.					Buy (add'l)	12/12/22	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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850. ---WORKIVA, INC		None	L	T	Sold (part)	04/29/22	J	B	
851.					Sold (part)	5/02/22	J	B	
852.					Sold (part)	05/03/22	J	B	
853.					Buy (add'l)	09/23/22	J		
854. ---XPEL INC (X)		None	J	T					
855. ---ZUORA, INC		None	J	T	Sold (part)	08/24/22	J		
856.					Sold (part)	10/17/22	J		
857.					Sold (part)	12/02/22	J		
858.					Sold (part)	12/08/22	J		
859. ---ZURN ELKAY WATER SOLUTIONS CORP (FKA ZURN WATER)	A	Dividend	K	T	Buy (add'l)	02/15/22	J		
860.					Buy (add'l)	02/16/22	J		
861.					Buy (add'l)	03/09/22	J		
862.					Buy (add'l)	04/29/22	J		
863. ---ZYNGA, INC		None			Sold (part)	04/21/22	J		
864.					Sold (part)	04/22/22	J		
865.					Sold (part)	05/10/22	J	A	
866.					Sold (part)	05/16/22	J	B	

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867.					Merged (with line 798)	05/24/22	L	E	
868. INV ACCT #7 (ACM) (LINES 869-985) (H)									
869. ---FIRST AMERICN GOVT OBLGTN FND MMF/CASH (NOTE 14 IN SECT VIII)	B	Dividend	N	T	Buy (add'l)	01/13/22	L		
870.					Sold (part)	01/14/22	L		
871.					Sold (part)	01/19/22	J		
872.					Buy (add'l)	02/24/22	L		
873.					Sold (part)	04/21/22	K		
874.					Sold (part)	05/04/22	K		
875.					Sold (part)	05/11/22	K		
876.					Buy (add'l)	05/16/22	K		
877.					Buy (add'l)	06/06/22	K		
878.					Sold (part)	06/24/22	L		
879.					Sold (part)	06/27/22	K		
880.					Buy (add'l)	07/12/22	K		
881.					Buy (add'l)	08/12/22	J		
882.					Buy (add'l)	09/12/22	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	
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Name of Person Reporting	Date of Report
Wood, Kimba M.	10/27/2023

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)	
883.					Sold (part)	09/13/22	K		
884.					Buy (add'l)	09/14/22	J		
885.					Buy (add'l)	09/15/22	J		
886.					Buy (add'l)	09/16/22	J		
887.					Buy (add'l)	09/19/22	J		
888.					Buy (add'l)	09/20/22	J		
889.					Buy (add'l)	09/23/22	J		
890.					Sold (part)	09/27/22	K		
891.					Buy (add'l)	09/28/22	J		
892.					Buy (add'l)	09/29/22	J		
893.					Sold (part)	10/17/22	K		
894.					Buy (add'l)	10/20/22	K		
895.					Buy (add'l)	10/27/22	J		
896.					Sold (part)	11/10/22	J		
897.					Sold (part)	11/14/22	J		
898.					Sold (part)	11/15/22	K		
899.					Sold (part)	11/16/22	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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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.)*

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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)	
900.					Sold (part)	12/05/22	K		
901.					Sold (part)	12/22/22	K		
902.					Buy (add'l)	12/28/22	M		
903.					Buy (add'l)	12/30/22	J		
904. COMMON STOCKS (ACM)(LINES 905-985) (H)									
905. ---ABIOMED INC		None			Buy (add'l)	10/13/22	J		
906.					Sold (part)	11/01/22	K	C	
907.					Sold	12/23/22	M	E	
908. ---AEROVIRONMENT INC		None	M	T	Sold (part)	09/08/22	J		
909. ---ANSYS INC		None	M	T	Sold (part)	10/18/22	K		
910. ---AZENTA INC		None	L	T					
911. ---BIO TECHNE CORP	A	Dividend	M	T	Sold (part)	02/22/22	K	A	
912.					Sold (part)	04/19/22	K	C	
913. ---BLACKBAUD INC		None	L	T	Sold (part)	09/08/22	K		
914. ---CERENCE INC		None	L	T	Buy	01/11/22	K		
915.					Buy (add'l)	01/12/22	K		
916.					Buy (add'l)	01/14/22	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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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	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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917.					Buy (add'l)	10/25/22	K		
918.					Buy (add'l)	12/01/22	K		
919. ---COGNEX CORP	A	Dividend	M	T	Buy (add'l)	05/09/22	K		
920. ---COGNYTE SOFTWARE LTD		None	K	T	Buy (add'l)	11/08/22	J		
921.					Buy (add'l)	11/09/22	J		
922.					Buy (add'l)	11/10/22	J		
923.					Buy (add'l)	11/11/22	J		
924.					Buy (add'l)	11/14/22	J		
925.					Sold (part)	12/28/22	J		
926. ---COMMVAULT SYSTEMS INC		None	L	T	Buy	06/22/22	K		
927.					Buy (add'l)	10/25/22	K		
928.					Buy (add'l)	12/20/22	K		
929. ---COSTAR GROUP INC		None	M	T	Buy (add'l)	10/13/22	J		
930. ---CYBERARK SOFTWARE LTD ISRAEL		None	M	T					
931. ---DEXCOM INC		None	L	T					
932. ---FACTSET RESEARCH SYSTEMS INC	B	Dividend	M	T					
933. ---FORTINET INC		None	M	T	Sold (part)	01/11/22	K	E	

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

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934.					Sold (part)	02/22/22	K	E	
935.					Sold (part)	04/19/22	K	E	
936.					Sold (part)	06/02/22	K	E	
937.					Sold (part)	07/08/22	K	E	
938.					Sold (part)	10/18/22	J	D	
939. ---GENTEX CORP	B	Dividend	L	T	Buy (add'l)	05/09/22	K		
940. ---GUIDEWIRE SOFTWARE INC		None	K	T	Buy (add'l)	11/08/22	J		
941. ---ICON PLC		None	M	T	Sold (part)	09/08/22	L	E	
942. ---IDEXX LABS INC		None	M	T	Sold (part)	02/22/22	K	B	
943. ---ILLUMINA INC		None	L	T	Sold (part)	05/09/22	K		
944. ---JACK HENRY ASSOCIATES INC	B	Dividend	M	T	Buy (add'l)	04/19/22	K		
945. ---KORNIT DIGITAL LTD		None	L	T					
946. ---KRATOS DEFENSE & SECURITY		None			Sold	10/25/22	K		
947. ---MANHATTAN ASSOCS INC		None	M	T					
948. ---MEDPACE HOLDINGS INC		None	M	T	Buy (add'l)	05/09/22	K		
949.					Sold (part)	10/18/22	J		
950.					Sold (part)	10/25/22	K	C	

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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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951. ---MORNINGSTAR INC	A	Dividend	M	T					
952. ---NATIONAL INSTRS CORP	A	Dividend	L	T	Buy	09/08/22	K		
953.					Buy (add'l)	09/09/22	K		
954.					Buy (add'l)	09/23/22	K		
955. ---NICE LTD ADR		None	M	T					
956. ---ORASURE TECHNOLOGIES INC		None			Sold (part)	08/10/22	J		
957.					Sold (part)	09/08/22	J		
958.					Sold (part)	09/09/22	J		
959.					Sold (part)	09/12/22	J		
960.					Sold (part)	09/13/22	J		
961.					Sold (part)	09/14/22	J		
962.					Sold (part)	09/15/22	J		
963.					Sold (part)	09/16/22	J		
964.					Sold (part)	09/21/22	J		
965.					Sold (part)	09/26/22	J		
966.					Sold	09/27/22	J		
967. ---PAYCOM SOFTWARE INC		None	K	T	Buy	04/19/22	K		

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968.					Buy (add'l)	05/02/22	K		
969. ---QUALYS INC		None	M	T	Buy (add'l)	12/20/22	K		
970. ---QUIDEL CORP		None			Sold	01/11/22	L		
971. ---RBC BEARINGS INC		None	M	T	Buy (add'l)	02/22/22	J		
972. ---REPLIGEN CORP		None	L	T	Buy (add'l)	04/19/22	K		
973.					Buy (add'l)	11/01/22	K		
974. ---RESMED INC	B	Dividend	M	T	Sold (part)	02/22/22	K	C	
975. ---SEI INVESTMENTS CO	A	Dividend			Sold (part)	01/11/22	K	C	
976.					Sold	05/12/22	K	C	
977. ---SPS COMMERCE INC		None	L	T	Buy	01/11/22	K		
978.					Buy (add'l)	01/12/22	K		
979. ---STAAR SURGICAL CO		None	K	T	Buy	06/22/22	K		
980.					Buy (add'l)	06/23/22	K		
981.					Buy (add'l)	09/23/22	J		
982.					Buy (add'l)	12/01/22	J		
983. ---TRADEWEB MARKETS INC	A	Dividend	L	T	Buy (add'l)	02/22/22	J		
984. ---VEEVA SYSTEMS INC		None	L	T					

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985. ---VERINT SYSTEMS INC		None	L	T	Sold (part)	12/20/22	K		
986. CITI BROKERAGE ACCOUNT - BANK DEPOSIT/CASH (X)	A	Interest	L	T					
987. ---TREASURY BILLS (INTEREST PAID AT MATURITY IN 2023)		None	P1	T	Buy	09/19/22	P1		
988. ADDL CMN STCKS, OPTNS & FUNDS (NON-IRA)(LINES 989-1051)(H)									
989. 908 DEVICES COMMON STOCK		None			Sold	03/04/22	M	F	
990. ABBOTT LABS COMMON STOCK	B	Dividend	M	T	Buy (add'l)	04/12/22	K		
991. ABBVIE, INC COMMON STOCK	D	Dividend	N	T					
992. AIR PRODS & CHEMS COMMON STOCK	C	Dividend	M	T					
993. ALPHABET COMMON STOCK		None	O	T					
994. AMAZON.COM COMMON STOCK		None	P1	T					
995. ANALOG DEVICES COMMON STOCK	C	Dividend	M	T					
996. ANTERO MIDSTREAM CORP		None			Spinoff (from line 1822)	04/06/22	M		
997.					Sold	04/08/22	M	E	
998. APPLE INC COMMON STOCK	B	Dividend	M	T					
999. AUTOMATIC DATA PROCESSING COMMON STOCK	B	Dividend	M	T					
1000. BERKSHIRE HATHAWAY COMMON STOCK		None	P1	T					
1001. BLACKROCK INC COMMON STOCK	E	Dividend	O	T	Sold (part)	08/12/22	M	G	

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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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1002. BLACKSTONE GROUP COMMON STOCK	E	Dividend	O	T	Buy (add'l)	12/08/22	M		
1003. BLACKSKY TECHNOLOGY INC		None	K	T	Spinoff (from line 1769)	10/11/22	M		
1004. BRISTOL MYERS SQUIBB COMMON STOCK	D	Dividend	M	T	Buy (add'l)	04/12/22	K		
1005. BROADCOM, INC COMMON STOCK	D	Dividend	N	T					
1006. CATERPILLAR COMMON STOCK	B	Dividend	M	T					
1007. CHEVRON COMMON STOCK	D	Dividend	N	T	Buy (add'l)	02/08/22	L		
1008. CME GROUP COMMON STOCK	D	Dividend	M	T					
1009. CMS ENERGY COMMON STOCK	C	Dividend	M	T					
1010. COCA COLA COMMON STOCK	D	Dividend	M	T	Buy (add'l)	04/12/22	K		
1011. COMCAST COMMON STOCK	D	Dividend	M	T					
1012. CORSA COAL COMMON STOCK		None			Sold	04/12/22	K	C	
1013. COSTCO WHOLESALE COMMON STOCK	C	Dividend	N	T	Buy (add'l)	01/19/22	L		
1014. CROWDSTRIKE HOLDINGS COMMON STOCK		None	M	T	Sold (part)	11/07/22	M		
1015. CROWN CASTLE COMMON STOCK	D	Dividend	M	T					
1016. CUMMINS COMMON STOCK	C	Dividend	M	T	Sold (part)	04/12/22	J		
1017. DANAHER CORP	A	Dividend	N	T	Buy	01/19/22	N		
1018.					Buy (add'l)	12/14/22	M		

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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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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.)*

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1019. DATADOG COMMON STOCK		None	M	T					
1020. DOCGO INC (FORMERLY INCLUDED ON LINE 1853)		None	P1	T					
1021. DOCUSIGN COMMON STOCK		None			Sold	01/26/22	M	D	
1022. HOME DEPOT COMMON STOCK	E	Dividend	O	T	Sold (part)	04/12/22	M	F	
1023.					Sold (part)	07/05/22	M	E	
1024. HONEYWELL COMMON STOCK	C	Dividend	M	T					
1025. INTUIT COMMON STOCK	C	Dividend	N	T	Sold (part)	05/09/22	M		
1026.					Buy (add'l)	06/23/22	M		
1027. JOHNSON & JOHNSON COMMON STOCK	E	Dividend	P1	T					
1028. JPMORGAN CHASE COMMON STOCK	D	Dividend	N	T					
1029. KENNAMETAL, INC COMMON STOCK	B	Dividend			Spinoff (from line 1822)	04/27/22	N		
1030.					Sold	06/07/22	N	E	
1031. KRAFT HEINZ CO COMMON STOCK	E	Dividend	O	T	Spinoff (from line 1839)	06/01/22	P1		
1032.					Sold (part)	07/29/22	O		
1033. LOCKHEED MARTIN CORP COMMON STOCK	D	Dividend	M	T					
1034. MCDONALDS INC COMMON STOCK	C	Dividend	M	T					
1035. MEDTRONIC PLC COMMON STOCK	C	Dividend	M	T					

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1036. MERCK & CO COMMON STOCK	D	Dividend	N	T					
1037. MICROSOFT COMMON STOCK	E	Dividend	P1	T					
1038. MONDELEZ INTL COMMON STOCK	D	Dividend	M	T					
1039. NVIDIA CORP COMMON STOCK	A	Dividend			Buy	01/26/22	M		
1040.					Buy (add'l)	03/18/22	M		
1041.					Buy (add'l)	07/05/22	M		
1042.					Sold	08/29/22	N		
1043. ORACLE CORP COMMON STOCK	B	Dividend	M	T	Buy	07/05/22	M		
1044.					Buy (add'l)	12/16/22	L		
1045. O'REILLY AUTOMOTIVE, INC COMMON STOCK		None	N	T	Buy	06/28/22	N		
1046. PAYPAL HOLDINGS COMMON STOCK		None			Sold	03/03/22	O		
1047. PEPSICO COMMON STOCK	D	Dividend	N	T					
1048. PHILLIPS 66 COMMON STOCK	D	Dividend	M	T					
1049. PROCTER & GAMBLE COMMON STOCK	D	Dividend	N	T	Buy (add'l)	04/12/22	L		
1050. PROSHARES ULTRAPRO SHORT ETF	A	Dividend	N	T	Buy	12/19/22	N		
1051. RAYTHEON TECH COMMON STOCK	C	Dividend	M	T					
1052. IRA ACCOUNT #2 (LINES 1053-1164) (H)									

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1053. ---ACTIVISION BLIZZARD INC COMMON STOCK		None			Sold	02/09/22	K		
1054. ---AIRBNB, INC COMMON STOCK		None			Buy	03/02/22	K		
1055.					Sold	07/06/22	J		
1056. ---ALPHABET INC COMMON STOCK		None			Sold (part)	02/17/22	K	E	
1057.					Sold	07/06/22	K	D	
1058. ---AMAZON COM INC COMMON STOCK		None			Sold (part)	02/17/22	K	D	
1059.					Sold	07/06/22	K	D	
1060. ---APOLLO GLOBAL MANAGEMENT INC COMMON STOCK	A	Dividend			Sold (part)	02/17/22	J	B	
1061.					Sold	07/06/22	K	B	
1062. ---ARDAGH METAL PKGING COMMON STOCK	A	Dividend			Sold	07/06/22	J		
1063. ---ARTISAN INTERNATIONAL VALUE FUND		None			Buy	02/17/22	K		
1064.					Buy (add'l)	07/06/22	J		
1065.					Sold	09/13/22	K		
1066. ---BARON GROWTH INSTITUTIONAL FUND (BGRIX)	B	Dividend	K	T	Buy	11/15/22	K		
1067. ---BNY MELLON GLB EMERG MKTS FUND (DGIEX)	A	Dividend	K	T	Buy	09/13/22	K		
1068. ---BOOKING HOLDINGS INC COMMON STOCK		None			Sold (part)	02/17/22	J	A	
1069.					Sold	07/06/22	K	A	

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1070. ---CARNIVAL CP COMMON STOCK		None			Sold (part)	02/17/22	J		
1071.					Sold	03/02/22	K		
1072. ---CITIGROUP INC COMMON STOCK	A	Dividend			Sold	02/17/22	K	D	
1073. ---COMMUNICATION SERVICES SELECT SECTOR FUND	A	Dividend			Buy	02/17/22	K		
1074.					Sold	07/06/22	J		
1075. ---DANAHER CORP COMMON STOCK	A	Dividend			Sold	02/17/22	K	E	
1076. ---META PLATFORMS INC COMMON STOCK					Sold (part)	02/17/22	J	A	
1077.					Sold	07/06/22	K	A	
1078. ---FIDELITY ADV HEALTH CARE FUND (FHCIX)		None	K	T	Sold (part)	02/17/22	K	A	
1079.					Buy (add'l)	07/06/22	J		
1080. ---FIRST TR DOW JONES STOXX EUR FUND (FDD)		None			Sold	02/17/22	K		
1081. ---FRANKLIN INTL GROWTH ADV FUND (FNGZX)	A	Dividend	K	T	Sold (part)	02/17/22	J		
1082.					Sold (part)	03/02/22	J		
1083.					Buy (add'l)	07/06/22	J		
1084.					Sold (part)	09/13/22	J		
1085. ---GLOBAL X CYBERSECURITY ETF (BUG)	A	Dividend			Sold (part)	02/17/22	J		
1086.					Buy (add'l)	07/06/22	J		

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1087.					Sold	11/15/22	K		
1088. ---GOLDMAN SACHS GQG INTL OPP FUND (GSIMX)	B	Dividend	K	T	Buy	09/13/22	K		
1089. ---GQG PARTNERS EMRG MKTS EQ INS FUND (GQGIX)	B	Dividend	K	T	Buy (add'l)	02/17/22	J		
1090.					Sold (part)	03/02/22	J		
1091.					Sold (part)	03/11/22	J		
1092.					Buy (add'l)	07/06/22	J		
1093. ---GUGGENHEIM S&P 500 EQUAL WEIGHT CONSUMER DISCR ETF (RCD)	A	Dividend			Buy	02/17/22	K		
1094.					Sold	07/06/22	J		
1095. ---INVESCO S&P 500 EQUAL WEIGHT FINANCIAL ETF	A	Dividend			Buy	03/11/22	K		
1096.					Sold	07/06/22	K		
1097. ---INVESCO S&P 500 GARP ETF (SPGP)	A	Dividend	L	T	Buy	07/06/22	L		
1098. ---ISHARES CORE S&P US GROWTH FUND (IUSG)	A	Dividend	L	T	Buy (add'l)	02/17/22	K		
1099.					Buy (add'l)	07/06/22	K		
1100. ---ISHARES EDGE MSCI MIN VOL USA FUND (USMV)	A	Dividend	L	T	Buy	02/17/22	K		
1101.					Buy (add'l)	07/06/22	K		
1102. ---ISHARES EDGE MSCI US MOMENTUM FUND (MTUM)		None			Sold	02/17/22	K	D	
1103. ---ISHARES EDGE MSCI US QLTY FAC FUND (QUAL)	B	Dividend	L	T	Buy (add'l)	02/17/22	K		

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1104.					Buy (add'l)	07/06/22	K		
1105. ---ISHARES N AMERICAN TECH SOFT FUND (IGV)	A	Dividend	K	T	Buy	02/17/22	K		
1106.					Buy (add'l)	03/02/22	J		
1107.					Buy (add'l)	07/06/22	J		
1108. ---ISHARES S&P MIDCAP 400 INDEX FUND (IJH)	A	Dividend	K	T	Sold (part)	02/17/22	J	A	
1109.					Buy (add'l)	07/06/22	K		
1110. ---ISHARES S&P 500 VAL ETF (IVE)	A	Dividend	K	T	Buy	02/17/22	K		
1111.					Buy (add'l)	07/06/22	J		
1112. ---JPMORGAN CHASE & CO COMMON STOCK	A	Dividend			Sold	02/17/22	K	D	
1113. ---KOPERNIK GLB ALL CAP INSTL FUND (KGGIX)		None			Sold	02/17/22	K		
1114. ---KRANESH BOSERA MSCI CHINA ETF (KBA)		None			Sold	02/17/22	K	C	
1115. ---KRANESHARES CSI CHINA INTERNET ETF (KWEB)		None			Sold	02/17/22	K		
1116. ---MCDONALDS CORP COMMON STOCK		None			Sold	02/17/22	K	B	
1117. ---MICROSOFT CORP COMMON STOCK	A	Dividend			Sold (part)	02/17/22	J	D	
1118.					Sold	07/06/22	K	D	
1119. ---MIRION TECHNOLOGIES INC COMMON STOCK		None			Sold (part)	02/17/22	J		
1120.					Sold	07/06/22	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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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)	
1121. ---NEUBERGER INTRINSIC VALUE INST FUND (NINLX)	B	Dividend	K	T	Buy	02/17/22	K		
1122.					Buy (add'l)	07/06/22	J		
1123. ---RITHM CAPITAL (FKA NEW RESIDENTIAL INVT CORP) COMMON STOCK	A	Dividend			Sold	02/17/22	K	A	
1124. ---NORWEGIAN CRUISE LINE HOLDING LTD COMMON STOCK		None			Sold (part)	02/17/22	J		
1125.					Sold	07/06/22	J		
1126. ---PAYPAL HOLDINGS INC COMMON STOCK					Buy (add'l)	02/07/22	J		
1127.					Buy (add'l)	02/17/22	J		
1128.					Sold	07/06/22	J		
1129. ---PROSHARES TR S&P 500 DV ARIST FUND (NOBL)	A	Dividend	K	T	Buy (add'l)	02/17/22	J		
1130.					Buy (add'l)	07/06/22	J		
1131. ---SALESFORCE.COM INC COMMON STOCK		None			Sold	02/17/22	K	C	
1132. ---SLR INVESTMENT CORP FUND (SLRC)	A	Dividend			Sold (part)	02/17/22	J		
1133.					Sold (part)	02/18/22	J	A	
1134.					Sold	02/24/22	J	B	
1135. ---SPDR S&P 500 ETF TRUST (SPY)	A	Dividend			Sold	02/17/22	J	C	
1136. ---THERMO FISHER SCIENTIFIC COMMON STOCK	A	Dividend			Sold	02/17/22	K	D	

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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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)	
1137. ---T ROWE PRICE HEALTH SCEINCE FD (PRHSX)	A	Dividend	K	T	Buy	02/17/22	J		
1138.					Buy (add'l)	07/06/22	J		
1139. ---THE EMERGING MARKETS INTERNET AND ECOMMERCE ETF		None			Buy	02/17/22	K		
1140.					Sold	07/06/22	K		
1141. ---UBER TECHNOLOGIES, INC COMMON STOCK		None			Buy	02/09/22	K		
1142.					Sold	07/06/22	J		
1143. ---UNITEDHEALTH GP INC COMMON STOCK	A	Dividend			Sold (part)	02/17/22	J	D	
1144.					Sold	07/06/22	K	D	
1145. ---VANGUARD INFO TECH ETF (VGT)	A	Dividend	K	T	Buy	02/17/22	K		
1146.					Buy (add'l)	07/06/22	J		
1147. ---VANGUARD S&P 500 ETF (VOO)	C	Dividend	M	T	Buy	02/17/22	M		
1148.					Buy (add'l)	07/06/22	K		
1149. ---VIRTUS KAR MID-CAP CORE FUND (VIMCX)	A	Dividend	K	T	Buy	02/17/22	K		
1150.					Buy (add'l)	07/06/22	J		
1151. ---VIRTUS KAR SM-CAP VALUE FUND (PXQSX)		None			Sold	02/17/22	K	C	
1152. ---VISA INC COMMON STOCK	A	Dividend			Sold	02/17/22	K	E	
1153. ---WARNER MUSIC GROUP CORP COMMON STOCK	A	Dividend			Sold (part)	02/17/22	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
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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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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)	
1154.					Sold	07/06/22	J		
1155. ---WELLS FARGO & CO COMMON STOCK	A	Dividend			Sold (part)	02/17/22	K	D	
1156.					Sold	07/06/22	J	D	
1157. ---WISDOMTREE CHINA EX-STATE-OWNED ENTERPRISES FUND (CXSE)		None			Buy	02/17/22	K		
1158.					Sold	03/11/22	J		
1159. ---WISDOMTREE GLOBAL EX-US QUAL DIV FUND (DNL)	A	Dividend	K	T	Buy	02/17/22	K		
1160.					Sold (part)	03/11/22	J		
1161.					Buy (add'l)	07/06/22	J		
1162.					Sold (part)	09/13/22	J		
1163. ---WISDOMTREE TR SMALLCAP FUND (EES)	A	Dividend	K	T	Buy	02/17/22	K		
1164.					Buy (add'l)	07/06/22	J		
1165. ADDL COMMN STOCKS (NON-IRA) (LINES 1166-1175) (H)									
1166. SALESFORCE, INC		None			Buy	08/12/22	N		
1167.					Sold	09/01/22	N		
1168. SEA LTD		None			Sold	03/15/22	M		
1169. SEMPRA ENERGY	C	Dividend	M	T					
1170. TARGET INC	C	Dividend	M	T	Sold (part)	02/08/22	L	E	

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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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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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1171. TRANSDIGM GRP	E	Dividend	O	T					
1172. UNION PACIFIC	B	Dividend	L	T	Sold (part)	04/12/22	K	C	
1173. UNITEDHEALTH GROUP	C	Dividend	N	T					
1174. VISA INC	D	Dividend	O	T					
1175. WALMART CORP	B	Dividend	M	T					
1176. PUT ACCT (LINES 1177-1224) (NOTE 3 IN SECT VIII) (H)									
1177. ---XSP PUT - CONTRACT CLOSED (EXP 2/18/22) OPENED IN 2021		None			Buy	02/17/22	J	A	
1178. ---XSP PUT - CONTRACT CLOSED (EXPIRES 2/11/22)		None			Buy	02/10/22	J		
1179. ---XSP PUT - CONTRACT OPENED (EXPIRES 4/14/22)		None			Sold	01/11/22	J		
1180. ---XSP CALL - CONTRACT CLOSED (EXP 5/6/22)		None			Buy	05/05/22	J		
1181. ---XSP PUT - CONTRACT OPENED (EXPIRES 5/20/22)		None			Sold	02/03/22	J		
1182. CONTRACT CLOSED					Buy	05/16/22	J		
1183. ---XSP PUT - CONTRACT OPENED (EXPIRES 4/14/22)		None			Sold	02/10/22	J		
1184. ---XSP PUT - CONTRACT OPENED (EXPIRES 3/31/22)		None			Sold	02/10/22	J		
1185. ---XSP PUT - CONTRACT OPENED (EXPIRES 5/20/22)		None			Sold	02/17/22	J		
1186. ---XSP PUT - CONTRACT OPENED (EXPIRES 4/29/22)		None			Sold	02/17/22	J		
1187. ---XSP PUT - CONTRACT OPENED (EXPIRES 5/31/22)		None			Sold	03/03/22	J		

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1188. ---XSP PUT - CONTRACT OPENED (EXPIRES 6/17/22)		None			Sold	03/17/22	J	
1189. CONTRACT CLOSED					Buy	06/16/22	J	
1190. ---XSP PUT - CONTRACT OPENED (EXPIRES 6/30/22)		None			Sold	04/01/22	J	
1191. CONTRACT CLOSED					Buy	06/29/22	J	
1192. ---XSP PUT - CONTRACT OPENED (EXPIRES 6/3/22)		None			Sold	04/08/22	J	
1193. CONTRACT CLOSED					Buy	05/31/22	J	
1194. ---XSP PUT - CONTRACT OPENED (EXPIRES 7/15/22)		None			Sold	04/12/22	J	
1195. CONTRACT CLOSED					Buy	07/14/22	J	
1196. ---XSP PUT - CONTRACT OPENED (EXPIRES 8/19/22)		None			Sold	05/05/22	J	
1197. ---XSP PUT - CONTRACT OPENED (EXPIRES 8/19/22)		None			Sold	05/16/22	J	
1198. ---XSP PUT - CONTRACT OPENED (EXPIRES 7/15/22)		None			Sold	05/16/22	J	
1199. ---XSP PUT - CONTRACT OPENED (EXPIRES 9/16/22)		None			Sold	05/31/22	J	
1200. ---XSP PUT - CONTRACT OPENED (EXPIRES 10/21/22)		None			Sold	06/16/22	J	
1201. ---XSP PUT - CONTRACT OPENED (EXPIRES 8/5/22)		None			Sold	06/27/22	J	
1202. ---XSP PUT - CONTRACT CLOSED (EXPIRES 10/7/22)		None			Buy	10/04/22	J	
1203. ---XSP PUT - CONTRACT OPENED (EXPIRES 10/21/22)		None			Sold	06/29/22	J	
1204. ---XSP PUT - CONTRACT OPENED (EXPIRES 9/16/22)		None			Sold	06/29/22	J	

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	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
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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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1205. ---XSP PUT - CONTRACT OPENED (EXPIRES 11/18/22)		None			Sold	07/14/22	J		
1206. ---XSP PUT - CONTRACT OPENED (EXPIRES 10/31/22)		None			Sold	07/14/22	J		
1207. ---XSP PUT - CONTRACT OPENED (EXPIRES 10/21/22)		None			Sold	08/05/22	J		
1208. CONTRACT CLOSED					Buy	10/19/22	J		
1209. ---XSP PUT - CONTRACT OPENED (EXPIRES 9/23/22)		None			Sold	08/12/22	J		
1210. CONTRACT CLOSED					Buy	09/19/22	J		
1211. ---XSP CALL - CONTRACT OPENED (EXPIRES 9/30/22)		None			Sold	08/16/22	J		
1212. CONTRACT CLOSED					Buy	09/28/22	J		
1213. ---XSP PUT - CONTRACT CLOSED (EXPIRES 11/4/22)		None			Buy	11/03/22	J		
1214. ---XSP PUT - CONTRACT OPENED (EXPIRES 12/16/22)		None			Sold	09/19/22	J		
1215. ---XSP PUT - CONTRACT OPENED (EXPIRES 11/18/22)		None			Sold	09/19/22	J		
1216. ---XSP PUT - CONTRACT OPENED (EXPIRES 12/16/22)		None			Sold	10/19/22	J		
1217. ---XSP PUT - CONTRACT OPENED (EXPIRES 12/2/22)		None			Sold	10/19/22	J		
1218. ---XSP PUT - CONTRACT OPENED (EXPIRES 12/9/22)		None			Sold	10/27/22	J		
1219. ---XSP PUT - CONTRACT OPENED (EXPIRES 1/20/23)		None			Sold	09/28/22	J		
1220. ---XSP PUT - CONTRACT OPENED (EXPIRES 1/31/23)		None			Sold	10/04/22	J		
1221. ---XSP PUT - CONTRACT OPENED (EXPIRES 2/17/23)		None			Sold	11/03/22	J		

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1222. ---XSP PUT - CONTRACT OPENED (EXPIRES 1/20/23)		None			Sold	11/03/22	J		
1223. ---XSP PUT - CONTRACT OPENED (EXPIRES 2/17/23)		None			Sold	12/08/22	J		
1224. ---XSP PUT - CONTRACT OPENED (EXPIRES 2/28/23)		None			Sold	12/15/22	J		
1225. CASH/S/T INVESTS/MM(F) ACCTS (LINES 1226-1305) (H)									
1226. GOLDMN SACHS BANK MM/CASH	E	Interest	P1	T					
1227. GOLDMN SACHS (PUT) MM/CSH	B	Interest	L	T					
1228. GOLDMAN SACHS DEPOSIT/CASH #2 (FDN)	A	Interest	J	T					
1229. CITIBANK CHECKING ACCOUNT - FOUNDATION		None	K	T					
1230. CITIBANK INTEREST CHECKING ACCOUNT #1 (FERP)	A	Interest	K	T					
1231. CITIBANK CHECKING ACCOUNT (HH)		None	K	T					
1232. CITI AGENCY CASH/WESTERN ASSET MM FUND (NOTE 14 SECT VIII)	C	Dividend	N	T	Buy (add'l)	01/07/22	J		
1233.					Buy (add'l)	01/26/22	J		
1234.					Buy (add'l)	01/31/22	J		
1235.					Buy (add'l)	02/01/22	J		
1236.					Sold (part)	02/08/22	J		
1237.					Sold (part)	02/14/22	J		
1238.					Buy (add'l)	02/15/22	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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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	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)	
1239.					Buy (add'l)	03/01/22	J		
1240.					Buy (add'l)	03/10/22	J		
1241.					Sold (part)	03/14/22	J		
1242.					Buy (add'l)	03/15/22	J		
1243.					Buy (add'l)	03/23/22	J		
1244.					Buy (add'l)	03/24/22	J		
1245.					Buy (add'l)	03/25/22	J		
1246.					Buy (add'l)	03/31/22	J		
1247.					Buy (add'l)	04/01/22	J		
1248.					Buy (add'l)	04/07/22	J		
1249.					Buy (add'l)	04/12/22	J		
1250.					Sold (part)	04/14/22	J		
1251.					Buy (add'l)	04/15/22	J		
1252.					Buy (add'l)	04/27/22	J		
1253.					Buy (add'l)	05/02/22	J		
1254.					Sold (part)	05/13/22	J		
1255.					Buy (add'l)	05/14/22	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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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	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)
1256.					Buy (add'l)	05/31/22	J	
1257.					Buy (add'l)	06/01/22	J	
1258.					Buy (add'l)	06/09/22	J	
1259.					Buy (add'l)	06/10/22	J	
1260.					Sold (part)	06/14/22	J	
1261.					Buy (add'l)	06/16/22	J	
1262.					Buy (add'l)	06/21/22	J	
1263.					Buy (add'l)	06/23/22	J	
1264.					Buy (add'l)	06/24/22	J	
1265.					Buy (add'l)	06/28/22	J	
1266.					Buy (add'l)	06/30/22	J	
1267.					Buy (add'l)	07/01/22	J	
1268.					Sold (part)	07/05/22	J	
1269.					Buy (add'l)	07/08/22	J	
1270.					Buy (add'l)	07/14/22	J	
1271.					Sold (part)	07/15/22	J	
1272.					Buy (add'l)	07/27/22	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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	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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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)	
1273.					Buy (add'l)	08/01/22	J		
1274.					Sold (part)	08/12/22	J		
1275.					Buy (add'l)	08/15/22	J		
1276.					Buy (add'l)	09/01/22	J		
1277.					Buy (add'l)	09/08/22	J		
1278.					Buy (add'l)	09/12/22	J		
1279.					Sold (part)	09/15/22	J		
1280.					Buy (add'l)	09/16/22	J		
1281.					Buy (add'l)	09/20/22	J		
1282.					Buy (add'l)	09/23/22	J		
1283.					Buy (add'l)	09/30/22	J		
1284.					Buy (add'l)	10/03/22	J		
1285.					Buy (add'l)	10/07/22	J		
1286.					Sold (part)	10/14/22	J		
1287.					Buy (add'l)	10/17/22	J		
1288.					Buy (add'l)	10/26/22	J		
1289.					Buy (add'l)	10/31/22	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

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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)	
1290.					Buy (add'l)	11/01/22	J		
1291.					Buy (add'l)	12/01/22	J		
1292.					Buy (add'l)	12/12/22	J		
1293.					Buy (add'l)	12/13/22	J		
1294.					Sold (part)	12/14/22	J		
1295.					Buy (add'l)	12/15/22	J		
1296.					Sold (part)	12/16/22	L		
1297.					Buy (add'l)	12/23/22	J		
1298.					Buy (add'l)	12/30/22	J		
1299. CITIBANK ASSET ACCOUNT		None	J	T					
1300. CITIBANK MONEY MARKET PLUS	F	Interest	P1	T					
1301. CITIBANK INTEREST CHECKING ACCOUNT #2 (KATNH)	A	Interest	J	T					
1302. CITIBANK CHECKING ACCOUNT (KATNH #2)		None	J	T					
1303. CITIBANK CHECKING ACCOUNT (REV TR)	A	Interest	L	T					
1304. UBS BANK USA DEPOSIT ACCOUNT (SEE NOTE 8 IN SECT VIII)		None	J	T					
1305. MORGAN STANLEY BANK/TRUST DEPOSITS #3/CASH (ROTH IRA)		None	J	T					
1306. FDN BROKERAGE #1 AT GOLDMAN (NOTE 16 IN SECT VIII) (H)									

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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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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)	
1307. JOHNSON & JOHNSON COMMON STOCK (DONATED TO FDN 3/4/22) (X)		None			Sold	03/04/22	M	G	
1308. BLACKROCK, INC COMMON STOCK (DONATED TO FDN ON 11/18/22) (X)		None			Sold	11/18/22	M	G	
1309. FDN BRKG ACCT #2 (LINES 1310-1458) (NOTE 16 SECT VIII) (H)									
1310. ---MORGAN STANLEY BANK/TRUST #2 (CASH/MM)	A	Interest	K	T					
1311. COMMON STOCKS AND FUNDS (LINES 1312-1458) (H)									
1312. ---ACTIVISION BLIZZARD INC COMMON STOCK		None			Sold	02/17/22	M	D	
1313. ---AIRBNB, INC COMMON STOCK		None			Buy	03/02/22	M		
1314.					Sold (part)	07/07/22	J		
1315.					Sold	12/09/22	L		
1316. ---ALPHABET INC COMMON STOCK		None	K	T	Sold (part)	02/17/22	M	F	
1317.					Sold (part)	07/07/22	K	E	
1318. ---AMAZON COM INC COMMON STOCK		None	K	T	Sold (part)	02/07/22	L	E	
1319.					Sold (part)	07/07/22	K	D	
1320. ---APOLLO GLOBAL MANAGEMENT INC COMMON STOCK	C	Dividend	L	T	Sold (part)	02/17/22	J	B	
1321.					Sold (part)	07/07/22	K	C	
1322. ---ARDAGH METAL PACKING COMMON STOCK (FKA GORES HLDNGS)	C	Dividend	K	T	Buy (add'l)	02/17/22	K		

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1323.					Sold (part)	07/07/22	K		
1324. ---ARTISAN INTL VALUE ADV FUND (APDKX)	B	Dividend	L	T	Buy	01/13/22	L		
1325.					Buy (add'l)	02/17/22	L		
1326.					Sold (part)	07/07/22	K		
1327.					Sold (part)	09/12/22	J		
1328. ---BARON GROWTH INSTITUTIONAL FUND (BGRIX)	C	Dividend	L	T	Buy	11/15/22	L		
1329.					Buy (add'l)	12/06/22	J		
1330. ---BNY MELLON GLB EMERG MKTS FUND (DGIEX)	A	Dividend	K	T	Buy	09/12/22	K		
1331. ---BOOKING HOLDINGS INC COMMON STOCK		None			Sold (part)	02/17/22	K	D	
1332.					Sold (part)	07/07/22	K	B	
1333.					Sold	10/31/22	L	D	
1334. ---CARNIVAL CP NEW PAIRED COMMON STOCK		None			Sold (part)	02/17/22	K		
1335.					Sold	03/02/22	M		
1336. ---CITIGROUP INC COMMON STOCK	B	Dividend			Sold	02/17/22	M	E	
1337. ---COMMUNICATION SERVICES SELECT SECTOR SPDR FUND	A	Dividend			Buy	01/24/22	L		
1338.					Buy (add'l)	02/17/22	K		
1339.					Sold	07/07/22	L		

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1340. ---DANAHER CORP COMON STOCK	A	Dividend			Sold	02/17/22	M	F	
1341. ---META PLATFORMS (FKA FACEBOOK INC) COMMON STOCK		None			Sold (part)	02/17/22	K		
1342.					Sold (part)	05/03/22	J	B	
1343.					Buy (add'l)	07/07/22	L		
1344.					Sold	12/06/22	K		
1345. ---FEDERATED HERMES GOVT OBL AVR MUTUAL FUND (GOVXX)		None	K	T	Buy	12/30/22	K		
1346. ---FIDELITY ADV HEALTH CARE MUTUAL FUND (FHCIX)		None	L	T	Sold (part)	02/17/22	L	D	
1347.					Sold (part)	07/07/22	K	B	
1348.					Buy (add'l)	09/12/22	J		
1349. ---FIRST TR DOW JONES STOXX EUR FUND (FDD)		None			Sold	02/17/22	M		
1350. ---FIRST TR MORNINGSTAR DIV FUND (FDL)	B	Dividend	M	T	Buy	10/31/22	L		
1351.					Buy (add'l)	11/01/22	L		
1352. ---FRANKLIN INTL GROWTH ADV MUTUAL FUND (FNGZX)	B	Dividend	L	T	Buy (add'l)	02/17/22	K		
1353.					Sold (part)	03/02/22	K		
1354.					Sold (part)	07/07/22	K		
1355. ---GLOBAL X CYBERSECURITY ETF (BUG)	B	Dividend			Sold (part)	02/17/22	L		
1356.					Sold (part)	07/07/22	K		

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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)	
1357.					Sold	11/15/22	L		
1358. ---GOLDMAN SACHS GQG INTL OPP FUND (GSIMX)	C	Dividend	L	T	Buy	09/12/22	L		
1359. ---GQG PARTNERS EMRG MKTS EQ INS MTL FND (GQGIX)	D	Dividend	L	T	Buy (add'l)	02/17/22	L		
1360.					Sold (part)	03/02/22	K		
1361.					Sold (part)	03/11/22	K		
1362.					Sold (part)	07/07/22	K		
1363.					Buy (add'l)	09/12/22	K		
1364. ---GUGGENHEIM S&P 500 EQUAL WEIGHT CONSUMER DISCR ETF	A	Dividend			Buy	02/17/22	L		
1365.					Sold	07/07/22	L		
1366. ---HP WORLDQUANT - FOUNDERS ESC HDGE FUND		None	N	T					
1367. ---INVESCO S&P 500 EQUAL WEIGHT FINANCIAL ETF	B	Dividend			Buy	03/11/22	M		
1368.					Sold	07/07/22	M		
1369. ---INVESCO S&P 500 GARP ETF (SPGP)	B	Dividend	M	T	Buy	07/07/22	M		
1370. ---ISHARES CORE S&P US GROWTH FUND	B	Dividend	L	T	Buy (add'l)	02/17/22	M		
1371.					Buy (add'l)	07/07/22	M		
1372.					Sold (part)	09/12/22	L	C	
1373. ---ISHARES EDGE MSCI MIN VOL USA FUND (USMV)	C	Dividend	M	T	Buy	02/17/22	M		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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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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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)	
1374.					Sold (part)	05/03/22	K		
1375.					Buy (add'l)	07/07/22	M		
1376.					Buy (add'l)	12/06/22	K		
1377.					Buy (add'l)	12/09/22	L		
1378. ---ISHARES EDGE MSCI US MOMENTUM FUND		None			Sold	02/17/22	M	F	
1379. ---ISHARES EDGE MSCI US QLTY FAC FUND	C	Dividend	L	T	Buy (add'l)	01/13/22	K		
1380.					Buy (add'l)	02/17/22	M		
1381.					Buy (add'l)	07/07/22	M		
1382.					Sold (part)	09/12/22	M	D	
1383. ---ISHARES N AMERICAN TECH SOFT FUND (IGV)	A	Dividend	L	T	Buy	02/03/22	L		
1384.					Buy (add'l)	03/02/22	K		
1385.					Sold (part)	07/07/22	K		
1386. ---ISHARES S&P 500 VAL ETF (IVE)	C	Dividend	M	T	Buy	02/17/22	M		
1387.					Sold (part)	07/07/22	L		
1388.					Buy (add'l)	09/12/22	L		
1389. ---ISHARES S&P MIDCAP 400 INDEX FUND (IJH)	B	Dividend	M	T	Sold (part)	02/17/22	J		
1390.					Sold (part)	07/07/22	L	D	

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	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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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)	
1391. ---JPMORGAN CHASE & CO COMMON STOCK	B	Dividend	L	T	Sold (part)	02/17/22	M	E	
1392.					Buy (add'l)	08/26/22	L		
1393. ---KOPERNIK GLB ALL CAP INSTL FUND (KGGIX)		None			Sold	02/17/22	M		
1394. ---KRANESH BOSERA MSCI CHINA FUND		None			Sold	02/17/22	L	D	
1395. ---KRANESHARE CSI CHINA INTERNET FUND (KWEB)		None			Sold	02/17/22	L		
1396. ---MCDONALDS COMMON STOCK		None			Sold	02/17/22	M	D	
1397. ---MICROSOFT CORP COMMON STOCK	A	Dividend	L	T	Sold (part)	02/17/22	L	E	
1398.					Sold (part)	07/07/22	L	E	
1399. ---MIRION TECHNOLOGIES INC COMMON STOCK		None			Sold (part)	02/17/22	K		
1400.					Sold (part)	07/07/22	K		
1401.					Sold (part)	10/25/22	J		
1402.					Sold	11/01/22	L		
1403. ---NEUBERGER INTRINSIC VALUE INST FUND (NINLX)	B	Dividend	L	T	Buy	01/13/22	L		
1404.					Buy (add'l)	02/17/22	L		
1405.					Sold (part)	07/07/22	K		
1406. ---RITHM CAPITAL CORP (FKA NEW RESIDENTIAL INVT CORP) COMMON STOCK	C	Dividend			Sold	02/17/22	M	C	

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	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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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)	
1407. ---NORWEGIAN CRUISE LINE HLDG LTD COMMON STOCK		None	L	T	Sold (part)	07/07/22	J		
1408. ---PAYPAL HOLDINGS COMMON STOCK		None	L	T	Buy (add'l)	02/07/22	L		
1409.					Buy (add'l)	02/17/22	J		
1410.					Sold (part)	07/07/22	K		
1411.					Sold (part)	08/15/22	J		
1412. ---PROSHARES TR S&P 500 DV ARIST FUND	C	Dividend	M	T	Buy (add'l)	02/17/22	K		
1413.					Buy (add'l)	07/07/22	M		
1414. ---SALESFORCE.COM, INC COMMON STOCK		None			Sold	02/17/22	M	E	
1415. ---SLR INVESTMENT CORP COMMON STOCK	C	Dividend			Sold (part)	02/17/22	K		
1416.					Sold (part)	02/18/22	K		
1417.					Sold	02/24/22	K	D	
1418. ---THERMO FISHER SCIENTIFIC COMMON STOCK	A	Dividend			Sold	02/17/22	M	F	
1419. ---T ROWE PRICE HEALTH SCIENCE FD (PRHSX)	A	Dividend	L	T	Buy	02/17/22	L		
1420.					Sold (part)	07/07/22	K		
1421.					Buy (add'l)	09/12/22	J		
1422. ---THE EMERGING MARKETS INTERNET AND ECOMMERCE ETF		None			Buy	02/17/22	M		
1423.					Sold (part)	06/08/22	J		

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	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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1424.					Sold (part)	07/07/22	L		
1425.					Sold	09/12/22	L		
1426. ---UBER TECHNOLOGIES INC COMMON STOCK		None	L	T	Buy	01/24/22	L		
1427.					Buy (add'l)	02/17/22	K		
1428.					Sold (part)	07/07/22	J		
1429. ---UNITEDHEALTH GP INC COMMON STOCK	B	Dividend	L	T	Sold (part)	02/17/22	L	E	
1430.					Sold (part)	05/03/22	J	B	
1431.					Sold (part)	07/07/22	L	E	
1432. ---VANGUARD INFO TECH ETF (VGT)	A	Dividend	L	T	Buy	02/17/22	M		
1433.					Sold (part)	07/07/22	L		
1434. ---VANGUARD S&P 500 ETF (VOO)	D	Dividend	N	T	Buy	02/17/22	O		
1435.					Buy (add'l)	07/07/22	N		
1436.					Sold (part)	07/12/22	J		
1437.					Buy (add'l)	09/12/22	K		
1438.					Buy (add'l)	12/06/22	J		
1439. ---VIRTUS KAR MID-CAP CORE FUND (VIMCX)	A	Dividend	L	T	Buy	02/17/22	M		
1440.					Buy (add'l)	07/07/22	L		

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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	
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1441. ---VISA INC COMMON STOCK	A	Dividend			Sold	02/17/22	M	F	
1442. ---WARNER MUSIC GROUP CORP COMMON STOCK	B	Dividend	L	T	Sold (part)	02/17/22	J	A	
1443.					Sold (part)	07/07/22	K		
1444. ---WELLS FARGO & CO COMMON STOCK	B	Dividend			Sold (part)	02/17/22	M	F	
1445.					Sold (part)	07/07/22	K	D	
1446.					Sold	08/26/22	L	E	
1447. ---WISCOMTREE CHINA EX-STATE-OWNED ENTERPRISES FUND					Buy	02/17/22	L		
1448.					Sold	03/11/22	L		
1449. ---WISDOMTREE TR GLB US QTLY DIV FUND (DNL)	C	Dividend	L	T	Buy	01/13/22	L		
1450.					Buy (add'l)	02/17/22	L		
1451.					Sold (part)	03/11/22	K		
1452.					Sold (part)	07/07/22	K		
1453.					Sold (part)	09/12/22	J		
1454. ---WISDOMTREE TR US SMALLCAP FUND (EES)	A	Dividend	L	T	Buy	01/13/22	L		
1455.					Buy (add'l)	01/24/22	K		
1456.					Buy (add'l)	02/17/22	K		
1457.					Sold (part)	05/03/22	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	
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1458.					Sold (part)	07/07/22	K		
1459. FDN BROKERAGE ACCOUNT #3 (LINES 1460-1519) (NOTE 26 SECT VIII) (H)									
1460. ---MORGAN STANLEY DEPOSIT/CASH ACCOUNT #3	A	Interest	L	T					
1461. ---APOLLO GLOBAL MGMT INC COMMON STOCK	B	Dividend	M	T	Buy	07/07/22	M		
1462.					Buy (add'l)	10/14/22	J		
1463. ---APOLLO COMMERCIAL REAL ESTATE FUND					Buy	07/07/22	L		
1464.					Sold	07/27/22	L	D	
1465. ---ARDAGH METAL PACKAGING SA COMMON STOCK	B	Dividend	K	T	Buy	07/07/22	L		
1466. ---AT&T INC COMMON STOCK	A	Dividend	K	T	Buy	07/07/22	K		
1467. ---BLACKSTONE INC COMMON STOCK	B	Dividend	L	T	Buy	07/07/22	L		
1468.					Buy (add'l)	10/14/22	K		
1469.					Buy (add'l)	12/01/22	K		
1470. ---BLACKSTONE MORTGAGE TRUST INC COMMON STOCK	C	Dividend	L	T	Buy	07/07/22	L		
1471.					Buy (add'l)	10/14/22	J		
1472. ---CIVITAS RESOURCES INC COMMON STOCK	C	Dividend	L	T	Buy	07/07/22	L		
1473. ---CROWN CASTLE INC COMMON STOCK	B	Dividend	L	T	Buy	07/07/22	K		

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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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1474.					Buy (add'l)	09/21/22	L		
1475.					Buy (add'l)	10/14/22	J		
1476. ---DIAMONDBACK ENERGY INC COMMON STOCK	B	Dividend	K	T	Buy	07/07/22	K		
1477. ---META PLATFORMS INC COMMON STOCK (SEE NOTE 26 IN SECT VIII) (TI)		None			Sold	07/07/22	L	C	
1478. ---NEXTERA ENERGY PARTNERS LP COMMON STOCK	B	Dividend	L	T	Buy	07/07/22	L		
1479.					Buy (add'l)	10/14/22	J		
1480. ---OAKTREE SPECIALTY LENDING CORP COMMON STOCK	C	Dividend	L	T	Buy	07/07/22	L		
1481. ---STARWOOD PROPERTY TRUST INC COMMON STOCK	C	Dividend	L	T	Buy	07/12/22	L		
1482.					Buy (add'l)	10/14/22	J		
1483. ---VICTORY MARKET NEUTRAL INC COMMON STOCK	B	Dividend			Buy	07/07/22	L		
1484.					Sold	09/21/22	L		
1485. ---ARES CAPITAL CORP STOCK (ARCC)	B	Dividend	K	T	Buy	07/07/22	K		
1486. ---BLACKSTONE SECURED LENDING FUND (BXSL)	D	Dividend	M	T	Buy	07/07/22	K		
1487.					Buy (add'l)	07/26/22	J		
1488.					Buy (add'l)	07/27/22	L		
1489.					Buy (add'l)	07/29/22	J		
1490. ---DOUBLELINE YIELD OPP FUND	B	Dividend	K	T	Buy	07/07/22	K		

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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Name of Person Reporting	Date of Report
Wood, Kimba M.	10/27/2023

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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1491. ---FIRST TR DOW JONES STOXX EUR FUND	B	Dividend			Buy	07/07/22	L		
1492.					Sold	10/14/22	L		
1493. ---FIRST TRUST SENIOR LOAN FUND	C	Dividend	L	T	Buy	07/07/22	M		
1494.					Sold (part)	10/14/22	J	A	
1495. ---GLOBAL X NASD 100 COV CALL FUND	D	Dividend	L	T	Buy	07/07/22	M		
1496. ---GOLUB CAPITAL BDC INC STOCK	B	Dividend	K	T	Buy	07/07/22	K		
1497. ---ISHARES CORE S&P US GROWTH FUND (SEE NOTE 26 IN SECT VIII) (TI)		None			Sold	07/07/22	N	E	
1498. ---ISHARES EDGE MSCI MIN VOL USA FUND (SEE NOTE 26 IN SECT VIII) (TI)		None			Sold	07/07/22	M		
1499. ---ISHARES EDGE MSCI US QLTY FAC FUND (SEE NOTE 26 IN SECT VIII) (TI)		None			Sold	07/07/22	N	E	
1500. ---ISHARES FALLEN ANGELS ETF	C	Dividend	M	T	Buy	07/27/22	M		
1501. ---ISHARES IBOXX HY COR BD ETF	C	Dividend	M	T	Buy	07/07/22	M		
1502.					Buy (add'l)	10/14/22	L		
1503. ---PROSHARES TR S&P 500 DV ARIST FUND (SEE NOTE 26 IN SECT VIII) (TI)		None			Sold	07/07/22	M	F	
1504. ---SLR INVESTMENT CORP COMMON STOCK	B	Dividend	K	T	Buy	07/07/22	K		
1505. ---VANGUARD INTERMEDIATE TERM COR FUND (VCIT)	B	Dividend	M	T	Buy	09/21/22	M		
1506. ---VANGUARD REAL ESTATE ETF	B	Dividend	L	T	Buy	07/07/22	L		
1507.					Buy (add'l)	10/14/22	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	
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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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1508. ---VANGUARD S&P 500 ETF (SEE NOTE 26 IN SECT VIII) (TI)		None			Sold	07/07/22	O		
1509. ---VIRTUS KAR MID-CAP CORE FUND (SEE NOTE 26 IN SECT VIII) (TI)		None			Sold	07/07/22	M		
1510. ---FEDERATED HERMEST GOVT OBL AVR FUND (GOVXX)	A	Dividend	M	T	Buy	08/26/22	M		
1511.					Sold (part)	09/21/22	L		
1512.					Sold (part)	10/14/22	M		
1513.					Buy (add'l)	11/11/22	L		
1514.					Buy (add'l)	12/30/22	L		
1515. ---BRANDYWINE GLOBAL CORP CRD MUTUAL FUND	C	Dividend	L	T	Buy	07/07/22	L		
1516. ---E V ADV FLOATING RATE MUTUAL FUND (EIFAX)	C	Dividend	L	T	Buy	07/07/22	L		
1517.					Sold (part)	10/14/22	J		
1518. ---MAINSTAY MCKAY SHTDUR HGYD MUTUAL FUND (MDHIX)	C	Dividend	M	T	Buy	07/07/22	M		
1519. ---PIMCO MORTGAGE OPP & BD MUTUAL FUND (PMZPX)	C	Dividend	L	T	Buy	07/07/22	L		
1520. NON-PUBLICS (NOTES 5 & 7 SECT VIII) (LNES 1521-1851) (H)									
1521. ELGIN CAPITAL (SEE NOTE 9 IN SECT VIII)		None	L	U					
1522. ---BAYSWATER ELGIN NATL RESOURCES FUND III (OWNS OIL AND GAS PPTY) (X)		None	L	W					
1523. CENTERBRIDGE CREDIT PARTNERS (SEE NOTE 9 IN SECT VIII)	E	Distribution	L	U	Distributed (part)	01/28/22	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	
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1524. ---NORTH AMERICAN BANK DEBT SECURITIES (X)		None	J	W					
1525. ---EUROPE BANK DEBT SECURITIES (X)		None	J	W					
1526. ---NORTH AMERICA CORP/GOVT BONDS (X)		None	J	W					
1527. ---EUROPE CORP/GOVT BONDS (X)		None	J	W					
1528. ---NORTH AMERICA PRIVATE EQUITY (X)		None	J	W					
1529. ---EUROPE EQUITY SECURITIES (X)		None	J	W					
1530. ---EUROPE TRADE CLAIMS (X)		None	J	W					
1531. ---NORTH AMERICA AFFILIATED ENTITIES (X)		None	J	W					
1532. ---EUROPE AFFILIATED ENTITIES (X)		None	J	W					
1533. IPC/UHS COINV PARTNERS (SEE NOTES 1 & 11 IN SECT VIII)		None			Distributed	01/10/22	J		
1534. TAMPA BAY RAYS (SEE NOTE 1 IN SECT VIII)	G	Distribution	O	W					
1535. OFFIT CAPITAL ADVISORS (SEE NOTE 1 IN SECTION VIII)	E	Distribution	M	W	Distributed (part)	10/07/22	K		
1536. SUMMERFIELD ROTOR HSI (SEE NOTE 1 IN SECT VIII)		None	N	W					
1537. WHOLESOME FOODS LP (SEE NOTE 11 IN SECTION VIII)		None			Distributed (part)	02/24/22	M		
1538.					Distributed	05/26/22	L		
1539. BLACKSTONE REAL ESTATE PRTNRS VI & VIII LPS (NOTE 9 IN SECT VIII)	G	Distribution	P1	U					
1540. ---GREAT EAGLE JOINT VENTURE (X)		None	J	U					

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1541. ---HILTON HAWAIIAN (X)		None	K	U	Sold (part)	02/28/22	J		
1542.					Sold (part)	05/26/22	J		
1543.					Sold (part)	08/30/22	J		
1544.					Sold (part)	11/30/22	J		
1545. ---MANYATA BUSINESS PARK (X)	D	Int./Div.	L	U	Distributed (part)	05/26/22	J		
1546.					Distributed (part)	11/30/22	J		
1547. ---POLAND RETAIL (NOTE 11 IN SECT VIII) (X)		None			Distributed	08/30/22	J		
1548. ---QUADRON BUSINESS PARK (X)	C	Int./Div.	K	U	Distributed (part)	05/26/22	J		
1549.					Distributed (part)	11/30/22	J		
1550.									
1551. ---ONE YORK STREET (X)		None	J	U					
1552. ---345 PARK AVENUE (X)	C	Int./Div.			Distributed	06/01/22	J		
1553. ---3880 N MISSION (X)		None	J	U					
1554. ---ACCOR HOTEL PORTFOLIO (X)		None	J	U					
1555. ---ALL STAR MILAN OFFICE PORTFOLIO (X)		None	J	U					
1556. ---ALPHA PORTFOLIO (X)	A	Int./Div.	J	U					
1557. ---AMERSTERDAM OFFICE PORTFOLIO (X)		None	J	U					

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1558. ---ANANTERA MALDIVES (X)		None	J	U					
1559. ---AXEL SPRINGER (X)		None	J	U					
1560. ---BBVA SPANISH RESIDENTIAL PORTFOLIO (X)		None	J	U					
1561. ---BANKIA SPANISH NON-PERFORMING LOAN PORTFOLIO (X)		None	J	U					
1562. ---BRIDGE MULTIFAMILY PORTFOLIO (X)		None			Distributed	06/01/22	J		
1563. ---CAMELOT LOGISTICS (X)	A	Int./Div.	J	U					
1564. ---CAULFIELD VILLAGE (X)		None	J	U	Buy (add'l)	12/01/22	J		
1565. ---CHANGSHU LOGISTICS PARK (X)		None	J	U					
1566. ---CHAPELLE OFFICE COMPLEX (X)		None	J	U					
1567. ---CONRAD MALDIVES (X)		None	J	U					
1568. ---COPENHAGEN RESIDENTIAL (X)		None	J	U					
1569. ---COPENHAGEN RESIDENTIAL II (X)		None	J	U					
1570. ---COPENHAGEN RESIDENTIAL III (X)		None	J	U					
1571. ---COVIVIO ITALIAN OFFICE PORTFOLIO (X)		None	J	U	Sold (part)	12/20/22	J		
1572. ---CROESUS RETAIL TRUST (X)	A	Int./Div.	J	U					
1573. ---DEPOT PARK (X)	A	Int./Div.	J	U	Distributed (part)	05/03/22	K		
1574. ---EAST COAST LOGISTICS (X)		None	J	U					

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1575. ---EDOBORI (X)		None			Distributed	06/01/22	J		
1576. ---ELANTE (X)		None	J	U					
1577. ---ELARA LAS VEGAS TIME SHARES (X)		None	K	U					
1578. ---EMPIRE SPANISH RESIDENTIAL PORTFOLIO (X)		None	J	U					
1579. ---ENCORE (X)		None	L	U					
1580. ---ESPLANADE MALL (X)		None	J	U					
1581. ---EUROPEAN BIG BOX LOGISTICS (X)	A	Int./Div.	J	U	Distributed (part)	06/01/22	J		
1582. ---EUROPEAN URBAN LOGISTICS I/II/ III (X)		None			Sold	05/03/22	M		
1583.					Distributed	12/20/22	J		
1584. ---FIST INTERNATIONAL FINANCE CENTER (X)	A	Int./Div.	J	U					
1585. ---FIRST PRIORITY DONGGUEN LOGISTICS (X)		None	J	U					
1586. ---FOXTROT INDL PORTFOLIO (X)	B	Int./Div.	K	U	Distributed (part)	05/03/22	K		
1587.					Distributed (part)	06/01/22	J		
1588. ---GALLOP AUSTRALIAN LOGISTICS PORTFOLIO (X)		None	J	U	Sold (part)	12/20/22	J		
1589. ---GE CAPITAL REAL ESTATE (X)	A	Int./Div.	K	U	Distributed (part)	03/01/22	J		
1590. ---GLOBAL SOURCES (X)		None	J	U					
1591. ---GRAMERCY PROPERTY TRUST (X)		None	M	U	Distributed (part)	05/03/22	M		

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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	
	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
Wood, Kimba M.	10/27/2023

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)	
1592.					Distributed (part)	06/01/22	J		
1593. ---GREYSTAR MULTIFAMILY PORTFOLIO (X)	A	Int./Div.	K	U	Sold (part)	03/01/22	J		
1594.					Sold (part)	06/01/22	J		
1595. ---HARBOR HOUSE LOGISTICS (X)		None	J	U					
1596. ---HILTON RIO (X)		None	J	U					
1597. ---HIRANANDANI LOGISTICS (X)		None	J	U					
1598. ---HISPANIA (X)		None	K	U					
1599. ---HOUSTON MULTIFAMILY PORTFOLIO (X)		None	J	U	Sold (part)	09/01/22	J		
1600.					Sold (part)	12/01/22	J		
1601. ---HYDRA WEST COAST OFFICE PORTFOLIO (X)		None	K	U					
1602. ---ICC (X)		None	J	U					
1603. ---ICONIC RESORTS PORTFOLIO (X)		None	M	U					
1604. ---INDIABULLS PORTFOLIO (X)		None	K	U					
1605. ---INDIABULLS GURGAON OFFICE PORTFOLIO (X)		None	J	U					
1606. ---INTERNATIONAL MARKET CENTERS (X)		None	L	U					
1607. ---JAPAN RESIDENTIAL 2/3 (X)	A	Int./Div.			Sold (part)	06/01/22	J		
1608.					Sold	09/01/22	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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Name of Person Reporting	Date of Report
Wood, Kimba M.	10/27/2023

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	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)	
1609. ---JUPITER INDUSTRIAL PORTFOLIO (X)	C	Int./Div.	O	U	Sold (part)	05/03/22	J		
1610.					Sold (part)	06/01/22	J		
1611. ---KAPOLEI LOFTS MULTIFAMILY (X)	A	Int./Div.	K	U	Distributed (part)	09/01/22	J		
1612. ---KENWOOD MULTIFAMILY (X)		None	J	U					
1613. ---KNIGHT SENIOR HOUSING PORTFOLIO (X)		None	J	U					
1614. ---KRYALOS STAKE (X)	A	Int./Div.	J	U					
1615. ---L&T MUMBAI OFFICE PORTFOLIO (X)		None	J	U	Distributed (part)	12/01/22	J		
1616. ---LEO II RETAIL PORTFOLIO (X)		None	J	U					
1617. ---LIVINGSTON DESIGNER OUTLETS (X)		None	K	U					
1618. ---MG PROPERTIES MULTIFAMILY (X)		None	J	U	Distributed (part)	06/01/22	J		
1619. ---MANHATTAN MULTIFAMILY PORTFOLIO (X)		None	J	U	Buy (add'l)	12/01/22	J		
1620. ---MAPLETREE JAPAN LOGISTICS (X)	A	Int./Div.	J	U					
1621. ---METROPOLITAN SQUARE (X)		None	J	U	Distributed (part)	06/01/22	J		
1622. ---MINDSPACE REIT (X)	A	Int./Div.			Sold	02/01/22	J		
1623. ---MIRVAC PORTFOLIO (X)		None	J	U					
1624. ---MOTOR ACCIDENT COMMISSION PORTFOLIO (X)		None	J	U					
1625. ---OBERBAUM CITY (X)		None	J	U					

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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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)	
1626. ---OBLIGO (X)		None	J	U					
1627. ---OFFICEFIRST PORTFOLIO (X)		None	J	U	Distributed (part)	06/01/22	J		
1628. ---OFFICE GROUP (X)		None	J	U					
1629. ---OMEGA INDUSTRIAL PORTFOLIO (X)		None	L	U					
1630. ---ONE BKC (X)		None	J	U					
1631. ---ONE INDIABULLS PARK (X)		None	J	U					
1632. ---ORIX RESIDENTIAL (X)		None	J	U					
1633. ---PANSCHIL (X)		None			Sold	02/01/22	J		
1634. ---PEAK MULTIFAMILY PORTFOLIO (X)	A	Int./Div.	J	U	Distributed (part)	09/01/22	J		
1635.					Sold (part)	12/01/22	J		
1636. ---PLD NATIONAL INDUSTRIAL PORTFOLIO (X)	A	Int./Div.	K	U	Distributed (part)	05/03/22	K		
1637.					Distributed (part)	06/01/22	J		
1638. ---POPULAR SPANISH DEVELOPER LOAN PRTF (X)		None	J	U					
1639. ---RMF INDUSTRIAL PORTFOLIO (X)	B	Int./Div.	K	U	Sold (part)	05/03/22	K		
1640. ---RIOCAN US GROCERY ANCHORED POWER CENTER (X)	A	Int./Div.	K	U	Distributed (part)	06/01/22	J		
1641.					Distributed (part)	09/01/22	K		
1642.					Sold (part)	12/01/22	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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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	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)	
1643. ---RIVER NORTH (X)		None	J	U	Buy (add'l)	12/01/22	J		
1644. ---RITZ CARLTON KAPALUA (X)		None	K	U					
1645. ---ROOK SENIOR HOUSING PORTFOLIO (X)		None	J	U					
1646. ---SAGE HOUSING PORTFOLIO (X)		None	K	U					
1647. ---SALARPURIA BUSINESS PARK (X)		None	K	U					
1648. ---SANTANDAR/POPULAR JV (X)		None	K	U	Buy (add'l)	03/24/22	K		
1649. ---SCENTRE OFFICE PORTFOLIO (X)	A	Int./Div.	J	U	Sold (part)	05/03/22	J		
1650. ---SEAWOODS (X)		None	J	U					
1651. ---SELECT SERVICE HOTEL PORTFOLIO (X)		None	J	U					
1652. ---SHANGHAI SONGJIANG LOGISTICS (X)		None	J	U					
1653. ---SODERMALM OFFICE (X)		None	J	U					
1654. ---SPACE CENTER INDUSTRIAL PORTFOLIO (X)	C	Int./Div.	N	U	Distributed (part)	05/03/22	K		
1655. ---SPANISH BIG BOX LOGISTICS PORTFOLIO (X)		None	J	U					
1656. ---SPANISH HOTELS (HIP) (X)		None	K	U					
1657. ---SPANISH URBAN LOGISTICS PORTFOLIO (X)		None			Sold	05/03/22	J		
1658. ---SPONDA PLC (X)		None	K	U	Distributed (part)	05/03/22	J		
1659. ---STEIGENBERGER HOTEL (X)		None	J	U					

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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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)	
1660. ---STRATEGIC HOTELS & RESORTS (X)		None	L	U					
1661. ---SUMMER HOUSE MULTIFAMILY (X)		None	J	U					
1662. ---SWEDISH URBAN LOGISTICS (X)		None			Sold	05/03/22	J		
1663. ---SWORDFISH AUSTRALIAN RETAIL PORTFOLIO (NOTE 17 SECT VIII) (X)		None			Sold (part)	03/01/22	J		
1664. ---TARRACO TOWER (X)		None	J	U					
1665. ---TESTA SPANISH MULTIFAMILY PORTFOLIO (X)		None	L	U					
1666. ---TIANJIN LANDPORT (X)		None	J	U					
1667. ---TITAN INDUSTRIAL PORTFOLIO (X)		None	L	U	Distributed (part)	05/03/22	K		
1668. ---TOURMALET PORTFOLIO (X)		None	J	U					
1669. ---TREASURE MALLS PORTFOLIO (X)		None	J	U					
1670. ---TREPTOWERS (X)		None	J	U					
1671. ---TSEUNG KWAN O HONG KONG RETAIL (X)		None	J	U					
1672. ---TURTLE BAY RESORT (X)		None	K	U					
1673. ---TYSAN HOLDINGS (X)		None	J	U					
1674. ---UK URBAN LOGISTICS I/II (X)		None			Sold	05/03/22	K		
1675. ---VIRTUS ITALIAN OFFICE PORTFOLIO (X)		None	J	U	Distributed (part)	09/01/22	J		
1676. ---VITTORIA SPANISH URBAN LOGISTICS (X)		None			Sold	05/03/22	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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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)	
1677. ---WEST CORE INDUSTRIAL (X)	A	Int./Div.	L	U					
1678. ---WESTEND MALL (X)		None	J	U					
1679. ---WESTGATE CENTER (X)		None	K	U					
1680. ---WESTLINK SHANGHAI BUSINESS PARK (X)		None	K	U					
1681.									
1682. CENTERVIEW CAPITAL (SEE NOTE 9 IN SECT VIII)	G	Distribution	K	U					
1683. ---OLE SMOKY (X)		None			Sold	04/07/22	O		
1684.					Distributed	08/12/22	J		
1685. ---ADVANTAGE SALES MARKETING (X)		None	L	W					
1686. DGNL VENTURES (SEE NOTE 9 IN SECT VIII)		None	N	U					
1687. ---305 FITNESS (X)		None	J	W					
1688. ---BANZA (X)		None	K	W					
1689. ---FEKKAI RETAIL (BLUE MISTRAL) (X)		None	J	W					
1690. ---HALLY (X)		None	J	W					
1691. ---ICELANDIC PROVISIONS (X)		None	J	W					
1692. ---JOUST GOODS (X)		None	K	W					
1693. ---KAMPS USA (X)		None	J	W					

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A =$1,000 or less
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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
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
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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)	
1694. ---MOON JUICE VENTURES (X)		None	J	W					
1695. ---SWOON BRANDS (X)		None	J	W					
1696. ---WRII (THE WELL) (X)		None	J	W					
1697. ---BOCKS (X)		None	K	W					
1698. ---CREATORIQ (X)		None	K	W	Sold (part)	04/04/22	J		
1699. ---JAWBONE HEALTHCARE HUB (X)		None	J	W					
1700. ---JUDY PREP (X)		None	J	W					
1701. ---MAGIC SPOON (X)		None	K	W					
1702. ---MAVEN CLINIC (X)		None	L	W					
1703. ---MSE LADDER INVEST CO (X)		None	J	W					
1704. ---PATTERN HOME (X)		None	J	W					
1705. ---QUIP NYC (X)		None	K	W					
1706. ---SARAH FLINT (X)		None	J	W					
1707. ---THE RIVETER (X)		None	J	W					
1708. ---TROVE RECOMMERCE (X)		None	J	W					
1709. ---WANDER BEAUTY (X)		None	J	W					
1710. ELGIN CAPITAL PARTNERS II (SEE NOTE 9 IN SECT VIII)	H1	Distribution	P1	U					

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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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)	
1711. ---BAYSWATER ELGIN NATL RESOURCES FUND III (OIL AND GAS PPTY) (X)		None	P1	U	Distributed (part)	07/20/22	K		
1712.					Distributed (part)	10/07/22	K		
1713. FIRST NECK SELF STORAGE LP (SEE NOTE 9 IN SECT VIII)		None	N	U	Distributed (part)	01/20/22	J		
1714.					Distributed (part)	02/17/22	J		
1715.					Distributed (part)	03/15/22	J		
1716.					Distributed (part)	04/14/22	J		
1717.					Distributed (part)	05/19/22	J		
1718.					Distributed (part)	06/16/22	J		
1719.					Distributed (part)	07/15/22	J		
1720.					Distributed (part)	08/16/22	J		
1721.					Distributed (part)	09/15/22	J		
1722.					Distributed (part)	10/14/22	J		
1723.					Distributed (part)	11/15/22	J		
1724.					Distributed (part)	12/15/22	J		
1725. ---FIRST NECK LR 10TH STREET (X)		None	L	W					
1726. ---FIRST NECK PARKLAND (X)		None	L	W					

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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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)	
1727. ---FIRST NECK VINELAND PROPERTY (X)		None	M	W					
1728. ---FIRST NECK UNIVERSITY AVENUE (X)		None	L	W					
1729. ---FIRST NECK SOUTH CRESCENT (X)		None	L	W					
1730. ---FIRST NECK ISLAND AVENUE (X)		None	K	W					
1731. ---FIRST NECK PEMBROKE PINES (X)		None	M	W					
1732. ---FIRST NECK SOUTH MACEDO (X)		None	L	W					
1733. GEMSPRING CAPITAL (SEE NOTE 9 IN SECTION VIII)	H1	Distribution	P1	U	Buy (add'l)	02/03/22	K		
1734. ---A10 CAPITAL (X)		None	N	W					
1735. ---BOBIT BUSINESS MEDIA (X)		None	L	W					
1736. ---CFORIA SOFTWARE (X)		None	M	W	Buy (add'l)	02/03/22	K		
1737. ---CRAFTY APES (X)		None	O	W	Distributed (part)	10/11/22	N		
1738. ---INSURVIA (X)		None	N	W					
1739. ---RADANCY (X)		None	N	W	Sold (part)	07/22/22	P1		
1740.					Distributed (part)	11/23/22	K		
1741. ---RAPID DISPLAYS (X)		None	N	W					
1742. ---SHRIEVE CHEMICAL (X)		None	O	W					
1743. ---SKYLINE DISPLAYS (X)		None	M	W					

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
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1744. ---UNITED GROUP PROGRAMS (X)		None	K	W	Buy (add'l)	02/03/22	K		
1745.					Distributed (part)	07/22/22	K		
1746. ---VALANT MEDICAL SOLULTIONS (X)		None	O	W	Buy (add'l)	02/03/22	J		
1747. HIGHCAPE PARTNERS (SEE NOTES 9 & 21 IN SECT VIII)		None	N	U	Distributed (part)	01/03/22	K		
1748. ---AZIYO BIOLOGICS (X)		None	N	W					
1749. KAYNE ANDERSON (SEE NOTE 9 IN SECT VIII)	A	Distribution	K	U	Distributed (part)	12/16/22	J		
1750. ---MEDICAL PROPERTIES I JV, LLC (X)		None	K	W					
1751. KITCHEN FUND (SEE NOTE 9 IN SECT VIII)		None	N	U					
1752. ---SWEETGREEN (X)		None	K	W					
1753. ---39N EEGEE'S INVESTORS (X)		None	L	W					
1754. ---CAVA GROUP (X)		None	K	W					
1755. ---CURRY UP NOW (X)		None	L	W					
1756. ---INDAY HOLDINGS (X)		None	K	W					
1757. ---SORTIS HOLDINGS (X)		None	L	W					
1758. ---THE HUMMUS & PITA COMPANY (X)		None	K	W					
1759. ---THE PIE HOLD (X)		None	L	W					
1760. ---VEGAN EATS GROUP (X)		None	L	W					

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2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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1761. VESTAR CAPL PRTNRS/ASSC IV/AIV (NOTE 9 SECT VIII) TERMINATED	A	Distribution							
1762. ---GLEASON (X)	C	Dividend			Sold	10/06/22	L		
1763.					Distributed	12/23/22	J		
1764. VESTAR CAP/ASSOC V (NOTE 9 IN SECT VIII)		None	J	W	Distributed (part)	01/25/22	L		
1765. ---HEALTHGRADES/MERCURY HEALTHCARE (X)		None			Sold (part)	01/25/22	L		
1766.					Sold	07/05/22	K		
1767. VESTAR ASSOCIATES, VII (SEE NOTE 12 IN SECT VIII) (X)	D	Distribution			Distributed	08/19/22	J		
1768. RAZOR'S EDGE FUND (SEE NOTE 9 IN SECT VIII)		None	N	W	Distributed (part)	01/25/22	K		
1769. ---BLACKSKY HOLDINGS (X)		None			Distributed	10/11/22	M		
1770. ---GOSECURE (X)		None	N	W					
1771. ---MERSIVE PLATFORM (X)		None	K	W					
1772. RAZOR'S EDGE FUND II (SEE NOTE 9 IN SECT VIII)	B	Distribution	P1	U	Distributed (part)	01/25/22	J		
1773.					Buy (add'l)	03/04/22	K		
1774.					Buy (add'l)	07/07/22	K		
1775. ---3DEO (X)		None	K	W					
1776. ---ALTAMIRA PARENT HOLDINGS (X)		None	K	W					
1777. ---AUTHENTICS (X)		None	M	W					

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1778. ---HAWKEYE 360 (X)		None	N	W					
1779. ---PROSCIA (X)		None	M	W					
1780. ---RACKTOP SYSTEMS (X)		None	L	W					
1781. ---URSA SPACE SYSTEMS (X)		None	L	W					
1782. ---VEROS HOLDINGS		None	M	W	Buy	03/04/22	L		
1783. RED ABBEY - NO YEAR END VALUE PRTNERSHP TERMINATED IN 12/2022		None							
1784. ---REMAINING ASSETS WRITTEN OFF									
1785. SENTINEL CAPITAL CONTINUATION FUND (SEE NOTE 10 IN SECT VIII)		None	N	W					
1786. ---CORPORATE VISIONS		None	M	W	Buy	02/28/22	L		
1787. ---123DENTIST (SEE NOTE 6 IN SECTION VIII)		None	M	W	Buy	08/10/22	M		
1788. SENTINEL CAPITAL IV, V AND VI (SEE NOTE 10 IN SECT VIII)	H1	Distribution	P2	W					
1789. ---ALTIMA DENTAL (SEE NOTE 21 IN SECT VIII)		None			Sold	08/29/22	P1		
1790. ---CABI HOLDING (SEE NOTE 21 IN SECT VIII)		None	N	W					
1791. ---AMWEST		None	N	W	Buy	02/18/22	N		
1792. ---APEX COMPANIES		None	P1	W					
1793. ---CAPTAIN D'S		None			Sold	05/20/22	P1		
1794.					Distributed	08/29/22	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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1795. ---CONTROLLED PRODUCTS		None			Merged (with line 1807)	01/26/22	N		
1796. ---ECM INDUSTRIES (SEE NOTE 21 IN SECT VIII)		None	P1	W	Distributed (part)	06/30/22	K		
1797. ---EMPIRE AUTO		None	P1	W	Buy	01/26/22	O		
1798. ---HOLLEY (FKA DRIVEN PERF BRANDS		None	N	W	Distributed (part)	03/29/22	M		
1799.					Distributed (part)	05/20/22	N		
1800. ---FAZOLI GROUP (SEE NOTE 11 IN SECT VIII)		None			Distributed	05/20/22	J		
1801. ---LUMINARIES (SEE NOTE 11 IN SECT VIII)		None			Distributed	08/29/22	J		
1802. ---MIDWEST EYE		None	N	W					
1803. ---MOBILE COMMUNICATIONS		None	O	W					
1804. ---NEKOOSA		None			Sold	11/07/22	P1		
1805. ---NEW ERA TECHNOLOGIES		None	P1	W					
1806. ---NEWK'S HOLDINGS		None	N	W					
1807. ---RECREATIONAL GROUP		None	O	W	Buy	01/26/22	N		
1808. ---REFRIGIWEAR		None	O	W					
1809. ---REVENEW INTERNATIONAL (SEE NOTE 21 IN SECT VIII)		None	O	W	Distributed (part)	09/30/22	J		
1810.					Distributed (part)	11/07/22	J		
1811. ---NEW YOU BARIATRIC (FKA SSJA BARTRC) (NOTE 21 IN SECT VIII)		None	O	W	Distributed (part)	01/04/22	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	
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1812.					Distributed (part)	06/30/22	M		
1813.					Distributed (part)	09/30/22	J		
1814. ---SPL		None	N	W	Buy	08/17/22	N		
1815. ---TOTAL MILITARY MANAGEMENT		None	O	W					
1816. ---TRANSYSTEMS (SEE NOTE 21 IN SECT VIII)		None	O	W	Buy (add'l)	02/18/22	J		
1817. ---TRIMECH (SEE NOTE 21 IN SECT VIII)		None	O	W	Buy	07/12/22	O		
1818.					Buy (add'l)	06/30/22	N		
1819. ---TTG IMAGING		None	M	T	Buy	02/18/22	N		
1820. ---UBEO		None	O	W	Distributed (part)	11/07/22	K		
1821. QUINTANA ENERGY PARTNERS - PARTNERSHIP TERMINATED (NOTE 9 SECT VIII)		None			Distributed	04/25/22	J		
1822. TINICUM LP (SEE NOTE 9 IN SECT VIII)	H1	Distribution	P1	W	Distributed (part)	06/08/22	O		
1823. ---(FUND MANAGES A DIVERSIFIED GROUP OF MANUFACTURNG, DISTRIB, INDUSTR					Buy (add'l)	06/08/22	J		
1824. TECH AND INFRASTUCTURE COMPANIES)					Distributed (part)	08/16/22	O		
1825.					Buy (add'l)	08/16/22	K		
1826.					Distributed (part)	11/16/22	L		
1827. ---FRANCE AEROSPACE COMMON STOCK (X)		None	J	W					

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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	
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1828. ---KENNAMETAL COMMON STOCK (X)		None	L	W					
1829. ---UK INDUSTRIAL (X)		None	K	W					
1830. ---US AEROSPACE (X)		None	M	W					
1831. ---WESCO INVESETMENT CO (X)		None	O	W					
1832. ---US INDUSTRIAL (X)		None	N	W					
1833. ---TWE AGGREGATOR HOLDINGS (X0		None	P1	W					
1834. ---TINICUM CARDINAL HOLDINGS (X)		None	O	W					
1835. ---TINICUM ENGINEERED SYSTEMS (X)		None	N	W					
1836. ---TINICUM VOLTAGE INVESTORS (X)		None	N	W					
1837. ---UK INDUSTRIAL COMMON STOCK (X)		None	J	W					
1838. ---US INDUSTRIAL COMMON STOCK (X)		None	L	W					
1839. 3G FUND IV LP (SEE NOTE 9 IN SECT VIII)	E	Distribution			Distributed (part)	03/28/22	K		
1840. --- (IN KIND DISTR OF SHARES THAT ARE INCLUDED ON LINE 1031 ABOVE)					Distributed (part)	06/01/22	P1		
1841.					Distributed	06/27/22	K		
1842. 3G FUND V LP (SEE NOTE 9 IN SECT VIII)	B	Distribution	O	U	Buy	01/14/22	O		
1843. ---HUNTER DOUGLAS BV COMMON STOCK (X)		None	O	W					
1844. VALINOR LP (SEE NOTE 9 IN SECT VIII)		None	O	W	Buy (add'l)	01/14/22	K		

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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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				
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1845. ---(FUND INVESTS IN BUSINESS PRODS & SERVICES AND INDUSTRIALS)					Buy (add'l)	10/03/22	K		
1846.					Distributed (part)	12/29/22	L		
1847. ---BAKED BY MELISSA (X)		None	N	W					
1848. ---HIGHER GROUND EDUCATION (X)		None	M	W					
1849. ---SUPER SPORTS HOLDINGS (X)		None	M	W					
1850. ---RIPTIDE WATERS (X)		None	L	W					
1851. ---RENTACRATE ENTERPRISES (X)		None	M	W					
1852. OTHER INVESTMENTS/NOTES RECEIVABLES (LINES 1853-1932) (H)									
1853. DOCGO - NOW PUBLICLY TRADED (MOVED ABOVE TO LINE 1020)									
1854. CSM VININGS LLC (FKA ATLANTA VININGS) (NOTE 1 IN SECT VIII)		None			Distributed (part)	01/14/22	J		
1855.					Distributed (part)	02/15/22	J		
1856.					Distributed (part)	03/15/22	J		
1857.					Distributed (part)	04/15/22	J		
1858.					Distributed (part)	05/13/22	J		
1859.					Sold	06/03/22	P1		
1860. BLACKSTONE REIT	G	Dividend	P1	U	Redeemed (part)	06/30/22	O	G	

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1861.					Redeemed (part)	11/30/22	P1	G	
1862.					Redeemed (part)	12/30/22	L	E	
1863. BLUE LOTUS INVESTMENT FUND (SEE NOTE 1 IN SECT VIII)	G	Distribution	O	U					
1864. BLUEPRINT BALTIMORE OPPTY ZONE FUND (NOTE 1 SECT VIII)		None	P1	U					
1865. BLUEPRINT TEXAS OPPTUNITY ZONE FUND (NOTE 1 SECT VIII)		None	P1	U	Distributed (part)	09/30/22	J		
1866.					Distributed (part)	12/12/22	J		
1867. GOLD BULLION		None	O	T					
1868. F. E. RICHARDSON & CO (SEE NOTES 1 & 13 IN SECT VIII)		None	L	V	Buy (add'l)	01/07/22	J		
1869.					Buy (add'l)	01/14/22	J		
1870.					Buy (add'l)	01/21/22	J		
1871.					Buy (add'l)	01/27/22	J		
1872.					Buy (add'l)	02/04/22	J		
1873.					Buy (add'l)	02/11/22	J		
1874.					Buy (add'l)	02/17/22	K		
1875.					Buy (add'l)	03/04/22	J		
1876.					Buy (add'l)	03/11/22	L		
1877.					Buy (add'l)	03/25/22	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	
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1878.					Buy (add'l)	04/01/22	J		
1879.					Buy (add'l)	04/08/22	J		
1880.					Buy (add'l)	04/14/22	J		
1881.					Buy (add'l)	04/21/22	J		
1882.					Buy (add'l)	04/29/22	J		
1883.					Buy (add'l)	05/05/22	J		
1884.					Buy (add'l)	05/13/22	J		
1885.					Buy (add'l)	05/20/22	J		
1886.					Buy (add'l)	05/25/22	M		
1887.					Buy (add'l)	05/27/22	J		
1888.					Buy (add'l)	06/06/22	K		
1889.					Buy (add'l)	06/10/22	L		
1890.					Buy (add'l)	06/17/22	J		
1891.					Buy (add'l)	06/24/22	J		
1892.					Buy (add'l)	06/30/22	J		
1893.					Buy (add'l)	07/07/22	J		
1894.					Buy (add'l)	07/13/22	K		

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	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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1895.					Buy (add'l)	07/26/22	J		
1896.					Buy (add'l)	08/01/22	J		
1897.					Buy (add'l)	08/04/22	J		
1898.					Buy (add'l)	08/11/22	J		
1899.					Buy (add'l)	08/18/22	L		
1900.					Buy (add'l)	08/25/22	J		
1901.					Buy (add'l)	08/30/22	J		
1902.					Buy (add'l)	09/01/22	J		
1903.					Buy (add'l)	09/09/22	J		
1904.					Buy (add'l)	09/15/22	K		
1905.					Buy (add'l)	09/29/22	J		
1906.					Buy (add'l)	10/05/22	J		
1907.					Buy (add'l)	10/13/22	J		
1908.					Buy (add'l)	10/21/22	J		
1909.					Buy (add'l)	10/27/22	J		
1910.					Buy (add'l)	10/28/22	J		
1911.					Buy (add'l)	11/04/22	J		

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1912.					Buy (add'l)	11/10/22	J		
1913.					Buy (add'l)	11/17/22	J		
1914.					Buy (add'l)	11/23/22	J		
1915.					Buy (add'l)	11/30/22	J		
1916.					Buy (add'l)	12/07/22	K		
1917.					Buy (add'l)	12/27/22	J		
1918.					Buy (add'l)	12/29/22	J		
1919.					Buy (add'l)	12/30/22	J		
1920. OVERLOOK PARTNERS - (SEE NOTE 1 IN SECT VIII)	B	Distribution	M	U	Redeemed	01/17/22	P1	H1	
1921. --- (SOLD ALL IN 1/22, THEN REPURCHASED IN 11/22)					Buy	11/01/22	M		
1922. OVERLOOK 3G PARTNERS (SEE NOTE 1 IN SECT VIII)	G	Distribution	N	U	Redeemed (part)	11/01/22	M		
1923. BAXTER HEALTHCARE (SEE NOTE 11 IN SECT VIII)		None			Distributed	10/17/22	K	E	
1924. BLACK LYNX (AKA RE SIDECAR 2) (SEE NOTE 11 IN SECT VIII)		None			Distributed	01/25/22	J		
1925. KF CHECKMATE (NOTE 1 SECT VIII)		None	M	U					
1926. GOSECURE (FKA COUNTER TACK) (AKA RE 6)(NOTE 1 IN SECT VIII)		None	N	U					
1927. NEWSGUARD TECHNOLOGY CORP		None	O	U					
1928. PERCEPTIVE LIFE SCIENCES (NOTE 1 IN SECT VIII)		None	N	U					

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1929. RTW ONSHORE FUND (NOTE 1 IN SECT VIII)		None	O	U					
1930. VEROS (RE II SIDECAR 3) (NOTE 1 IN SECT VIII)		None	M	U					
1931. WHALE ROCK FLAGSHIP FUND (NOTE 1 IN SECT VIII)		None	P1	U					
1932. WHALE ROCK HYBRID FUND II (NOTE 1 IN SECT VIII)		None	O	U					
1933. TRUST #1 (LINES 1934-2012) (SEE NOTE 2 SECT VIII)(H)									
1934. ---CITI TRUST CHECKING ACCOUNT (2010)	A	Interest	K	T					
1935. ---GOLDMAN SACHS BANK DEPOSIT/ CASH #4	B	Interest	L	T					
1936. COMMON STOCKS (H)									
1937. ---ABB-VIE INC.	D	Dividend	M	T	Sold (part)	08/15/22	M	G	
1938. ---AMAZON.COM INC		None	M	T					
1939. ---BLACKROCK INC	D	Dividend	M	T					
1940. ---COSTCO WHOLESALE CORP	B	Dividend	M	T					
1941. ---META PLATFORMS INC		None			Sold	05/09/22	L	E	
1942. ---HOME DEPOT, INC	D	Dividend	N	T					
1943. ---JOHNSON & JOHNSON	C	Dividend	M	T					
1944. ---MASTERCARD INC	C	Dividend	N	T					
1945. ---MICROSOFT CORPORATION	B	Dividend	M	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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1946. ---UNITEDHEALTH GROUP INC	B	Dividend	M	T					
1947. FIXED INCOME (H)									
1948. ---GOLDMAN SACH BANK DEPOSIT/ CASH #5	A	Interest	J	T	Open	09/19/22	M		
1949. ---3M COMPANY MTN 3.375% 3/1/2029		None	J	T	Buy	09/21/22	J		
1950. ---AGILENT TECHNOLOGIES INC 2.3% 3/12/2031		None	J	T	Buy	09/21/22	J		
1951. ---AIR LEASE CORP 1.875% 8/15/2026		None	J	T	Buy	09/21/22	J		
1952. ---AMERICAN HONDA FINANCE MTN 3.45% 7/14/2023		None	J	T	Buy	09/21/22	J		
1953. ---APPLE INC 2.4% 5/3/2023	A	Interest	J	T	Buy	09/21/22	J		
1954. ---ASTRAZENECA PLC 3.375% 11/16/2025	A	Interest	J	T	Buy	09/21/22	J		
1955. ---AUTONATION INC 3.85% 3/1/32		None	J	T	Buy	09/21/22	J		
1956. ---BANK OF AMERICA CORP HYBRID MTN 6/14/24	A	Interest	J	T	Buy	09/21/22	J		
1957. ---BANK OF MONTREAL MTN 4.7% 9/14/27		None	J	T	Buy	09/21/22	J		
1958. ---BANK OF NY MELLON CORP HYBRID MTN 6/13/28	A	Interest	J	T	Buy	09/21/22	J		
1959. ---BAT CAPITAL CORP 3.215% 9/6/26		None	J	T	Buy	09/21/22	J		
1960. ---BAXTER INTERNATIONAL INC 2.272% 12/1/28	A	Interest	J	T	Buy	09/21/22	J		
1961. ---BHP BILLITON FINANCE LTD 3.85% 9/30/23	A	Interest	J	T	Buy	09/21/22	J		
1962. ---BIOGEN INC 2.25% 5/1/30	A	Interest	J	T	Buy	09/21/22	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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Name of Person Reporting	Date of Report
Wood, Kimba M.	10/27/2023

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)	
1963. ---BROADCOM INC 4.3% 11/15/32	A	Interest	J	T	Buy	09/21/22	J		
1964. ---BUNGE LTD FINANCE CORP 2.75% 5/14/31	A	Interest	J	T	Buy	09/21/22	J		
1965. ---CAPITAL ONE FINANCIAL CORP HYBRID 5/10/28	A	Interest	J	T	Buy	09/21/22	J		
1966. ---CAPITAL ONE FINANCIAL CORP HYBRID 7/29/32		None	J	T	Buy	09/21/22	J		
1967. ---CELANESE US HOLDINGS LLC 5/9% 7/5/24		None	J	T	Buy	09/21/22	J		
1968. ---CITIGROUP INC HYBRID 11/3/25	A	Interest	J	T	Buy	09/21/22	J		
1969. ---CITIZENS FINANCIAL GROUP 3.25% 4/30/30	A	Interest	J	T	Buy	09/21/22	J		
1970. ---COMCAST CORP 3.95% 10/15/25	A	Interest	J	T	Buy	09/21/22	J		
1971. ---COMERICA INC 3.7% 731/23		None	J	T	Buy	09/21/22	J		
1972. ---DELL INT LLC/EMC CORP 4.9% 10/1/26	A	Interest	J	T	Buy	09/21/22	J		
1973. ---DOW CHEMICAL CO 4.8% 11/30/28	A	Interest	J	T	Buy	09/21/22	J		
1974. ---EBAY INC 2.6% 5/10/31	A	Interest	J	T	Buy	09/21/22	J		
1975. ---ENABLE MIDSTREAM PARTNERS 4.15% 9/15/29		None	J	T	Buy	09/21/22	J		
1976. ---ENTERGY CORP 2.8% 6/15/30	A	Interest	J	T	Buy	09/21/22	J		
1977. ---ENTERGY LA LLC 2/35% 6/15/32	A	Interest	J	T	Buy	09/21/22	J		
1978. ---EVERGY INC 2.9% 9/15/29		None	J	T	Buy	09/21/22	J		
1979. ---EVERSOUCE ENERGY 4.2% 6/27/24	A	Interest	J	T	Buy	09/21/22	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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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.)*

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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)	
1980. ---GATX CORP 4.0% 6/30/30	A	Interest	J	T	Buy	09/21/22	J		
1981. ---GENERAL MOTORS CO 5.6% 10/15/32	A	Interest	J	T	Buy	09/21/22	J		
1982. ---HEALTHCARE TRUST OF AMER 3.1% 2/15/30		None	J	T	Buy	09/21/22	J		
1983. ---INVESCO FINANCE PLC 3.75% 1/15/26		None	J	T	Buy	09/21/22	J		
1984. ---JPMORGAN CHASE HYBRID 4/23/24	A	Interest	J	T	Buy	09/21/22	J		
1985. ---MCKESSON CORP .9% 12/3/25	A	Interest	J	T	Buy	09/21/22	J		
1986. ---MID-AMERICA APARTMENTS 3.95% 3/15/29		None	J	T	Buy	09/21/22	J		
1987. ---MITSUBISHI UFJ FINANCIAL GROUP 3.287% 7/25/27		None	J	T	Buy	09/21/22	J		
1988. ---MITSUBISHI UFJ FINANCIAL GROUP 4.05% 9/11/28		None	J	T	Buy	09/21/22	J		
1989. ---MORGAN STANELY HYBRID 4/5/24	A	Interest	J	T	Buy	09/21/22	J		
1990. ---MPLX LP 4.95% 9/1/32		None	J	T	Buy	09/21/22	J		
1991. ---NXP BV/NXP FDG/NXP USA 4.3% 6/18/29	A	Interest	J	T	Buy	09/21/22	J		
1992. ---ORACLE CORP 3.25% 5/15/30	A	Interest	J	T	Buy	09/21/22	J		
1993. ---PAYPAL HOLDINGS INC 4.4% 6/1/32	A	Interest	J	T	Buy	09/21/22	J		
1994. ---PERKINELMER INC 3.3% 9/15/29		None	J	T	Buy	09/21/22	J		
1995. ---PHILIP MORRIS INTERNATIONAL IN 1.125% 5/1/23	A	Interest	J	T	Buy	09/21/22	J		
1996. ---PHILIP MORRIS INTERNATIONAL IN 2.75% 2/25/26		None	J	T	Buy	09/21/22	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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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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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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1997. ---REALTY INCOME CORP 3.95% 8/15/27		None	J	T	Buy	09/21/22	J		
1998. ---ROYAL BANK OF CANADA MTN 4.65% 1/27/26		None	J	T	Buy	09/21/22	J		
1999. ---SKYWORKS SOLUATIONS INC 3% 6/1/31	A	Interest	J	T	Buy	09/21/22	J		
2000. ---SOUTHERN COMPANY GAS CAPITAL 1.75% 1/15/31		None	J	T	Buy	09/21/22	J		
2001. ---SPECTRA ENERGY PARTNERS 3.375% 10/15/26	A	Interest	J	T	Buy	09/21/22	J		
2002. ---STANLEY BLACK & DECKER 3% 5/15/32	A	Interest	J	T	Buy	09/21/22	J		
2003. ---SUMITOMO MITSUI FINCANCIAL GROUP 3.944% 7/19/28		None	J	T	Buy	09/21/22	J		
2004. ---SYNCHRONY FINANCIAL 3.95% 12/1/27	A	Interest	J	T	Buy	09/21/22	J		
2005. ---THE BANK OF NOVA SCOTIA 4.5% 12/16/25	A	Interest	J	T	Buy	09/21/22	J		
2006. ---TORONTO-DOMINION BANK MTN 4.693% 9/15/27		None	J	T	Buy	09/21/22	J		
2007. ---TOYOTA MOTOR CORP 3.419% 7/20/23		None	J	T	Buy	09/21/22	J		
2008. ---UDR INC 3% 8/15/31		None	J	T	Buy	09/21/22	J		
2009. ---VF CORP 2.95% 4/23/30	A	Interest	J	T	Buy	09/21/22	J		
2010. ---VIACOM CBS INC 2.9% 1/15/27		None	J	T	Buy	09/21/22	J		
2011. ---WELLS FARGO & CO HYBRID MTN 5/22/28	A	Interest	J	T	Buy	09/21/22	J		
2012. ---WESTPAC BANKING CORP HYBRID MTN 11/23/31	A	Interest	J	T	Buy	09/21/22	J		
2013. TRUST #1B (LINES 2014-2094) (NOTE 2 IN SECT VIII) (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
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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	
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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)	
2014. ---CITI TRUST CHECKING ACCOUNT (2012)		None	J	T					
2015. ---FARALLON CAPITAL (LINES 2016-2045) (NOTES 5,7 9,22 & 24 SECT VIII)	A	Interest	M	W	Distributed (part)	08/16/22	J		
2016. ---POLAND CONSUMER CYCLICAL BANK DEBT (X)			J	W					
2017. ---US CONSUMER CYCLICAL BANK DEBT (X)			J	W					
2018. ---US CONSUMER NON-CYCLICAL BANK DEBT (X)			J	W					
2019. ---US REAL ESTATE BANK DEBT (X)			J	W					
2020. ---CANADA COMMUNICATIONS COMMON STOCK (X)			J	W					
2021. ---CHINA INDUSTRIAL COMMON STOCK (X)			J	W					
2022. ---CHINA TECHNOLOGY COMMON STOCK (X)			J	W					
2023. ---INDONESIA COMMUNICATIONS COMMON STOCK (X)			J	W					
2024. ---JAPAN CONSUMER NON-CYCLICAL COMMON STOCK (X)			J	W					
2025. ---JAPAN INDUSTRIAL COMMON STOCK (X)			J	W					
2026. ---NETHERLANDS TECHNOLOGY COMMON STOCK (X)			J	W					
2027. ---UNITED KINGDOM CONSUMER NON-CYCLICAL COMMON STOCK (X)			J	W					
2028. ---US CONSUMER NON-CYCLICAL COMMON STOCK (X)			K	W					
2029. ---US DIVERSIFIED COMMON STOCK (X)			J	W					

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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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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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)	
2030. ---UN EXCHANGE TRADED FUND COMMON STOCK (X)			J	W					
2031. ---US FINANCIAL COMMON STOCK (X)			J	W					
2032. ---US TECHNOLOGY COMMON STOCK (X)			J	W					
2033. ---CHINA TECHNOLOGY CONVERTIBLE BOND (X)			J	W					
2034. ---GERMANY TECHNOLOGY CONVERTIBLE BOND (X)			J	W					
2035. ---INDIA FINANCIAL CORPORATE BOND (X)			J	W					
2036. ---US ENERGY CORPORATE BOND (X)			J	W					
2037. ---INDIA GOVERNMENT BOND (X)			J	W					
2038. ---JAPAN GOVERNMENT BOND (X)			J	W					
2039. ---GREAT BRTAIN FINANCIAL LP (X)			J	W					
2040. ---US REAL ESTATE PREFERRED STOCK (X)			J	W					
2041. ---US FINANCIAL TRADE CLAIM (X)			J	W					
2042. ---US FUNDS TRADE CLAIM (X)			J	W					
2043. ---INDIA DIVERSIFIED DEBT (X)			J	W					
2044. ---JAPAN INDUSTRIAL DEBT (X)			J	W					
2045. ---US REAL ESTATE EQUITY (X)			J	W					
2046. ---TD AMERITRADE MONEY MARKET/ CASH	A	Interest	K	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
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2047. ---ADOBE INC COMMON STOCK		None	M	T	Buy (add'l)	02/18/22	K		
2048.					Sold (part)	05/10/22	K		
2049.					Sold (part)	05/13/22	K		
2050.					Sold (part)	11/10/22	K		
2051. ---ALPHABET INC COMMON STOCK		None	N	T					
2052. ---AMAZON.COM INC COMMON STOCK		None	L	T					
2053. ---BLACKSTONE GROUP INC COMMON STOCK	E	Dividend	N	T	Buy (add'l)	09/23/22	K		
2054. ---COSTCO WHOLESALE CORP COMMON STOCK	A	Dividend	M	T	Buy	01/18/22	K		
2055.					Buy (add'l)	02/24/22	K		
2056.					Buy (add'l)	05/20/22	K		
2057.					Buy (add'l)	09/23/22	K		
2058.					Buy (add'l)	12/15/22	L		
2059. ---CROWDSTRIKE HOLDINGS INC COMMON STOCK		None			Sold	01/25/22	L		
2060. ---DOMINOS PIZZA INC COMMON STOCK	B	Dividend	M	T					
2061. ---HCA HEALTHCARE INC COMMON STOCK	C	Dividend	N	T	Buy (add'l)	04/22/22	K		
2062.					Sold (part)	09/09/22	K	A	
2063. ---HONEYWELL INTL INC COMMON STOCK	D	Dividend	N	T	Buy (add'l)	02/03/22	K		

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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)	
2064.					Buy (add'l)	02/18/22	K		
2065.					Buy (add'l)	02/24/22	K		
2066.					Sold (part)	08/16/22	K	B	
2067.					Sold (part)	10/24/22	K	A	
2068. ---ISHARES TRUST TRS FLT RT BD ETF (TFLO)	A	Dividend	M	T	Buy	10/24/22	M		
2069. ---ISHARES TRUST ISHARES 0-3 MONTH TREASURY (SGOV)	A	Dividend	M	T	Buy	10/24/22	M		
2070. ---JOHNSON & JOHNSON COMMON STOCK	C	Dividend	M	T					
2071. ---MASTERCARD INC COMMON STOCK		None			Sold	01/04/22	K	E	
2072. ---MICROSOFT CORP COMMON STOCK	C	Dividend	M	T					
2073. ---MORGAN STANLEY COMMON STOCK	B	Dividend			Buy	03/01/22	M		
2074.					Sold	09/21/22	M	C	
2075. ---OCCIDENTAL PETROLEUM CORP COMMON STOCK		None	K	T	Buy	09/23/22	K		
2076. ---PRIME CAP ODYSSEY AGGRESSIVE GROWTH MUTUAL FUND		None			Sold (part)	01/19/22	K	D	
2077.					Sold (part)	03/09/22	K	E	
2078.					Sold (part)	05/10/22	K	D	
2079.					Sold (part)	05/13/22	K	D	
2080.					Sold	05/23/22	K	E	

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
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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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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)	
2081. ---PROSHARES TRUST ULTRAPRO SHORT QQQ	A	Dividend	L	T	Buy	11/30/22	L		
2082.					Sold (part)	12/02/22	K	A	
2083.					Sold (part)	12/28/22	K	C	
2084. ---SCHWAB FUNDS TREAS OBLIG MONEY INVESETOR (SNOXX)	B	Dividend	N	T	Buy	11/17/22	M		
2085.					Buy (add'l)	12/30/22	J		
2086. ---SERVICENOW INC COMMON STOCK		None	M	T	Sold (part)	05/10/22	K		
2087.					Sold (part)	05/13/22	K		
2088.					Sold (part)	11/10/22	K		
2089. ---UNITEDHEALTH GROUP INC COMMON STOCK	B	Dividend	M	T	Buy (add'l)	01/06/22	J		
2090.					Buy (add'l)	02/24/22	J		
2091. ---VANGUARD CONSUMER DISCRETIONARY ETF	B	Dividend	M	T					
2092. ---VANGUARD DIVIDEND APPRECIATION FUND	D	Dividend	N	T					
2093. ---VANGUARD INFORMATION TECHNOLOGY ETF	D	Dividend	O	T	Sold (part)	01/19/22	K	D	
2094. ---US TREASURY NOTES		None	M	T	Buy	09/19/22	M		
2095. TRUST #2 (LINES 2096-2121) (SEE NOTE 19 IN SECT VIII) (H)									
2096. ---TD AMERITRADE INSURED DEPOSIT/CASH ACCOUNT	A	Interest	J	T					
2097. ---COSTCO WHOLESALE CORP COMMON STOCK	A	Dividend	K	T	Buy	09/23/22	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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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	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)	
2098.					Buy (add'l)	12/15/22	J		
2099. ---CROWDSTRIKE HOLDINGS INC COMMON STOCK		None			Sold	01/25/22	J		
2100. ---FED NATIONAL MTG ASSN BOND	A	Interest			Buy	06/13/22	L		
2101.					Matured	10/05/22	K		
2102. ---PRIMECAP ODYSSEY GR FD		None			Sold (part)	01/19/22	J	C	
2103.					Sold (part)	03/09/22	J	B	
2104.					Sold (part)	05/10/22	J	C	
2105.					Sold (part)	05/13/22	K	D	
2106.					Sold	05/23/22	K	D	
2107. ---INVESCO QQQ TRUST SERVICES FUND	A	Dividend	L	T	Sold (part)	01/19/22	J	C	
2108. ---ISHARES TRUST TRS FLT RT BOND ETF	B	Dividend	M	T	Buy	09/30/22	M		
2109.					Sold (part)	12/15/22	J		
2110. ---ISHARES NATL MUNI BND ETF	A	Dividend			Sold (part)	02/14/22	J		
2111.					Sold	04/19/22	K		
2112. ---ISHARES RUSSELL MID-CAP GROWTH ETF	A	Dividend	J	T	Sold (part)	03/09/22	J	B	
2113.					Sold (part)	05/10/22	J	B	
2114.					Sold (part)	05/13/22	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		
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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.)*

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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)	
2115. ---SCHWAB FUNDS TREAS OBLIG MUTUAL FUND (SNOXX)	A	Dividend	L	T	Buy	11/17/22	L		
2116. ---SPDR BLOOMBERG SHORT TERM ETF	A	Dividend			Sold	02/04/22	K		
2117. ---US TREASURY BILL DUE 7/26/22	A	Interest			Buy	06/13/22	K		
2118.					Matured	07/26/22	K		
2119. ---US TREASURY BILL DUE 9/22/22	A	Interest			Buy	06/13/22	K		
2120.					Matured	09/22/22	K		
2121. ---VANGUARD DIVIDEND APPRECIATION ETF	B	Dividend	M	T	Sold (part)	03/08/22	J		
2122. TRUST #3 (LINES 2123-2152) (SEE NOTE 19 IN SECT VIII) (H)									
2123. ---TD AMERITRADE CASH ACCOUNT	A	Interest	L	T					
2124. ---ADOBE INC COMMON STOCK		None	K	T	Sold (part)	11/10/22	J	A	
2125. ---AMAZON.COM INC COMMON STOCK		None	K	T					
2126. ---AMGEN INC COMMON STOCK	A	Dividend	K	T					
2127. ---APPLE INC COMMON STOCK	A	Dividend	K	T	Sold (part)	01/03/22	J	C	
2128. ---FIRST TRUST DJ INTERNET COMMON STOCK		None	J	T	Sold (part)	01/03/22	J	B	
2129.					Sold (part)	03/09/22	J	C	
2130.					Sold (part)	05/10/22	J	B	
2131.					Sold (part)	05/13/22	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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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)	
2132. ---ALPHABET INC COMMON STOCK		None	K	T	Sold (part)	05/13/22	J	B	
2133. ---HOME DEPOT INC COMMON STOCK	A	Dividend	K	T					
2134. ---ISHARES TRUST TRS FLT RT BOND ETF (TFLO)	A	Dividend	L	T	Buy	11/17/22	L		
2135. ---ISHARES S&P MID-CAP ETF (IJH)	A	Dividend	K	T					
2136. ---ISHARES NATL MUNI BND FUND (MUB)	A	Dividend			Sold (part)	02/14/22	K	A	
2137.					Sold	03/25/22	K	B	
2138. ---ISHARES US MED DVC ETF (IHI)	A	Dividend	K	T					
2139. ---ISHARES 0-5 YRS TIPS ETF (STIP)	B	Dividend			Buy (add'l)	09/20/22	J		
2140.					Sold	10/05/22	K		
2141. ---JP MORGAN CHASE & CO COMMON STOCK	A	Dividend	K	T					
2142. ---L3 HARRIS TECHNOLOGIES INC COMMON STOCK		None			Sold	02/28/22	K	D	
2143. ---MICROSOFT CORP COMMON STOCK	A	Dividend	K	T					
2144. ---MORGAN STANLEY COMMON STOCK	A	Dividend			Buy (add'l)	01/18/22	J		
2145.					Buy (add'l)	03/01/22	J		
2146.					Sold (part)	05/13/22	J		
2147.					Sold	05/23/22	K		
2148. ---UNITEDHEALTH GROUP INC COMMON STOCK	A	Dividend	L	T					

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	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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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)	
2149. ---UNITED STATED T BILLS 1/31/2023		None	L	T	Buy	09/19/22	L		
2150. ---UNITED STATES T BILLS 12/31/2022	A	Interest			Buy	10/13/22	L		
2151.					Matured	12/31/22	K		
2152. ---VISA INC COMMON STOCK	A	Dividend	K	T	Sold (part)	03/09/22	J		
2153. TRUST #4 (SEE NOTE 2 IN SECT VIII) (H)									
2154. ---PARK AVENUE EQUITY LP (SEE NOTES 9 & 22 IN SECT VIII)		None	J	U					
2155. TRUST #5 (NOTE 2 IN SECT VIII) (LINES 2156-2186) (H)									
2156. ---TD AMERITRADE DEPOSIT ACCOUNT/CASH	A	Interest	J	T					
2157. ---ADOBE INC COMMON STOCK		None			Sold	01/25/22	K		
2158. ---CROWDSTRIKE HOLDINGS INC COMMON STOCK		None			Sold	01/25/22	K		
2159. ---DANAHER CORP COMMON STOCK		None			Buy	01/06/22	K		
2160.					Buy (add'l)	01/18/22	J		
2161.					Sold	01/25/22	K		
2162. ---GENERAL HOLDINGS INC COMMON STOCK		None			Buy	08/26/22	K		
2163.					Sold	10/10/22	K		
2164. ---INVESCO ETF TAXABLE MUN BD	A	Dividend			Sold (part)	02/14/22	J	A	
2165.					Sold	03/22/22	K	A	

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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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2166. ---INVESCO QQQ ETF	A	Dividend			Sold (part)	01/19/22	J	C	
2167.					Sold (part)	01/25/22	K	D	
2168.					Sold	05/10/22	K	E	
2169. ---ISHARES TRUST SHORT TREAS BD ETF	B	Dividend	M	T	Buy	09/30/22	M		
2170. ---ISHARES TRUST TRS FLT RT BD ETF	B	Dividend	M	T	Buy	05/23/22	J		
2171.					Buy (add'l)	05/24/22	K		
2172.					Buy (add'l)	12/01/22	M		
2173. ---MORGAN STANLEY COMMON STOCK	A	Dividend			Buy	03/01/22	K		
2174.					Sold	09/21/22	K	A	
2175. ---NEXTERA ENERGY INC COMMON STOCK	B	Dividend	L	T					
2176. ---PARK AVENUE EQUITY LP (SEE NOTES 9 & 22 IN SECT VIII)		None	J	U					
2177. ---PAYPAL HOLDINGS INC COMMON STOCK		None			Sold	01/25/22	L		
2178. ---SCHWAB FUNDS TREAS OBLIG MONEY INVESTOR	A	Dividend	L	T	Buy	11/17/22	L		
2179. ---SPDR BLOOMBERG SHORT TERM FUND		None			Sold	01/25/22	K		
2180. ---US TREASURY NOTE	A	Interest			Buy	09/01/22	L		
2181.					Redeemed	12/01/22	L		
2182. ---VANGUARD DIVIDEND APPRECIATION ETF	B	Dividend	L	T	Sold (part)	03/08/22	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
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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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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)	
2183.					Sold (part)	10/10/22	K	D	
2184. --- VANGUARD TOTAL STOCK MARKET ETF	A	Dividend			Sold (part)	05/13/22	K	E	
2185.					Sold	05/23/22	K	E	
2186. ---VERIZON COMMUNICATIONS COMMON STOCK	B	Dividend	K	T	Buy	03/22/22	K		
2187. TRUST #6 (NOTE 2 IN SECT VIII)(LINES 2188-2219) (H)									
2188. ---TD AMERITRADE CASH/INSURED DEPOSIT ACCOUNT #3	A	Interest	J	T					
2189. ---ISHARES TRUST TRS FLT RT BD ETF	A	Dividend	K	T	Buy	09/30/22	K		
2190. ---PARK AVENUE EQUITY LP (SEE NOTES 9 & 22 IN SECT VIII)		None	J	U					
2191. ---TD AMERITRADE CASH/INSURED DEPOSIT ACCOUNT #3A	A	Interest	K	T					
2192. ---COSTCO WHOLESALE CORP	A	Dividend	K	T	Buy	09/23/22	K		
2193.					Buy (add'l)	12/15/22	J		
2194. ---CROWDSTRIKE HOLDINGS IN COMMON STOCK		None			Sold	01/25/22	K		
2195. ---DANAHER CORP COMMON STOCK		None			Buy	01/06/22	K		
2196.					Buy (add'l)	01/18/22	J		
2197.					Sold	01/25/22	L		
2198. ---HOME DEPOT INC COMMON STOCK	A	Dividend	K	T					
2199. ---ISHARES TRUST SHORT TREAS BD ETF	A	Dividend	L	T	Buy	09/30/22	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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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)	
2200. ---LIVE NATION ENTERTAINMENT INC COMMON STOCK		None	K	T					
2201. ---MICROSOFT CORP COMMON STOCK	A	Dividend	K	T					
2202. ---MONGODB INC COMMON STOCK		None			Sold	01/25/22	K	E	
2203. ---MORGAN STANLEY COMMON STOCK	A	Dividend			Buy (add'l)	01/18/22	J		
2204.					Buy (add'l)	02/24/22	J		
2205.					Buy (add'l)	04/22/22	J		
2206.					Sold (part)	05/13/22	K		
2207.					Sold	09/21/22	K		
2208. ---PRIME CAP ODYSSEY GROWTH FUND		None			Sold	01/18/22	L	E	
2209. ---SCHWAB FUNDS TREAS OBLIG MONEY INVESTOR	A	Dividend	K	T	Buy	11/17/22	K		
2210. ---SERVICENOW INC COMMON STOCK		None			Sold	01/25/22	K		
2211. ---US TREASURY NOTES 7/26/22	A	Interest			Buy	06/13/22	K		
2212.					Matured	07/26/22	K		
2213. ---US TREASURY NOTES 9/22/2022	A	Interest			Buy	06/13/22	K		
2214.					Matured	09/22/22	K		
2215. ---US TREASURY NOTES 11/25/22	A	Interest			Buy	06/13/22	K		
2216.					Matured	11/25/22	K		

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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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)	
2217. ---US TREASURY NOTES 1/31/23		None	K	T	Buy	10/24/22	K		
2218. ---VERIZON COMMUNICATIONS COMMON STOCK	B	Dividend	L	T	Buy	03/21/22	L		
2219.					Buy (add'l)	07/27/22	K		
2220. TRUST #7 (SEE NOTE 4 IN SECT VIII) (Y)									
2221. [redacted] ACCOUNT #1 AT GOLDMAN (SEE NOTE 2 IN SECT VIII) (H)									
2222. ---GOLDMAN CASH ACCOUNT #6	A	Interest	K	T					
2223. ---ALPHABET INC COMMON STOCK		None	J	T					
2224. ---AMERICAN EXPRESS CO COMMON STOCK	A	Dividend	J	T					
2225. ---APPLE INC COMMON STOCK	A	Dividend	J	T	Buy	01/19/22	J		
2226. ---BLACKSTONE GROUP INC COMMON STOCK	A	Dividend	J	T	Buy	01/19/22	J		
2227. ---DANAHER CORP COMMON STOCK	A	Dividend	J	T	Buy (add'l)	01/18/22	J		
2228. ---DOCUSIGN, INC COMMONS STOCK		None			Sold	04/29/22	J		
2229. ---GS TAX ADVANTAGED GLOBAL EQUITY PORTFOLIO	A	Dividend	K	T	Buy	08/22/22	K		
2230. ---MICROSOFT CORP COMMON STOCK	A	Dividend	J	T					
2231. ---NOVO-NORDISK ADR COMMON STOCK	A	Dividend	J	T	Buy	01/19/22	J		
2232. ---PAYPAL HOLDINGS, INC COMMON STOCK		None			Sold	01/18/22	J		
2233. ---UNITED HEALTH GROUP INC COMMON STOCK	A	Dividend	J	T	Buy	01/19/22	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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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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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)	
2234. ---VISA INC COMMON STOCK	A	Dividend	J	T					
2235. ---ZENDESK, INC COMMON STOCK		None			Sold	08/22/22	J		
2236. ---SEA LIMITED SPONSORED ADR COMMON STOCK		None			Sold (part)	03/15/22	J	B	
2237.					Sold	08/22/22	J	A	
2238. [redacted] ACCOUNT #2 AT GOLDMAN (SEE NOTE 2 IN SECT VIII) (H)									
2239. ---GOLDMAN CASH ACCOUNT #7	A	Interest	K	T					
2240. ---APPLE INC COMMON STOCK	A	Dividend	J	T	Buy	03/25/22	J		
2241. ---BERKSHIRE HATHAWAY INC COMMON STOCK		None	J	T	Buy	03/25/22	J		
2242. ---CHEVRON CORP COMMON STOCK	A	Dividend			Buy	04/08/22	J		
2243.					Sold	08/22/22	J		
2244. ---GS TAX-ADVANTED GLOBAL EQUITY PORTFOLIO COMMON STOCK	A	Dividend	J	T	Buy	08/22/22	J		
2245. ---MICROSOFT CORP COMMON STOCK	A	Dividend	J	T	Buy	01/26/22	J		
2246. ---PROCTER & GAMBLE CO COMMON STOCK	A	Dividend			Buy	04/08/22	J		
2247.					Sold	08/22/22	J		
2248. ---UNITEDHEALTH GROUP INC COMMON STOCK	A	Dividend	J	T	Buy	04/08/22	J		
2249. MERRILL LYNCH VSG ACCOUNT (Y)									
2250. COMPUTERSHARE ACCOUNT (Y)									

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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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)	
2251. ENTERTAINMENT ACQUISITION CO (SEE NOTE 11 IN SECT VIII)	D	Distribution							
2252.									
2253.									

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.)*

GENERAL NOTES: Letters in parentheses at end of some descriptions in Column A represent ticker symbols (for preparer's use).

NOTE 1: If a 2022 K-1 was issued for this entity, all activity (interest, dividends, capital gains, ordinary income, etc.) was netted together, and, if that net figure was larger than the required income threshold, it was included in Column B.(1) with Column B.(2) noting "Distribution." If the K-1 activity netted to a loss, then Column B.(1) was left blank and "None" was included in Column B.(2). If the entity received distributions during the year, those amounts are included as transactions in Column D with gains being included in the K-1 amounts noted in Column B.(1).

NOTE 2: Reporting person's [redacted] is either the Trustee or the Investment Trustee of this Trust and the Trust was formed by the reporting person and/or her [redacted]. Therefore, its assets are deemed reportable. For the [redacted], reporting person's [redacted] has investment oversight and the reporting person and/or her [redacted] opened the accounts. As such, assets are deemed reportable.

NOTE 3: For the reportable contracts that were opened (sold short), any related gains that occur will be included on the FDR when the options either expire or require action, if the transactions are reportable at that time. When closing a contract requires the purchase of shares, the transaction produces a gain if the amount received when the option was sold is more than the amount required to purchase the shares at the closing of the contract. If the contract was fulfilled (closed) over successive days, each reportable purchase is shown on a separate line and the related gain (if any), is shown. There is no year end value reported because the contracts had no value at the end of 2022. Please note that if a contract is opened and closed in the same year, and both transactions are reportable, they are included on successive lines and refer to the same contract. All contracts open and close. However, both sides of every contract are not necessarily reportable due to the transaction reporting threshold.

NOTE 4: This Trust is an unfunded trust. The term life policies expired in a prior year. The checking account was closed in a prior year.

NOTE 5: There are many investments in non-public companies. The estimated market values used for all such investments, unless otherwise noted, are the amounts shown either on the 12/31/2022 valuation from the Fund or on the family's books as of 12/31/2022. The reporting family's book amounts are based upon the current knowledge of the worth of such companies, available company issued reports and the cost of the initial investment, less distributions plus additional investments, if no updated value is available.

NOTE 6: The Fund made this investment. It will issue a capital call to investors to cover but as of 12/31/2022 the capital call had not yet been made. The related liability is included in Section VI.

NOTE 7: For those entities which issued K-1s, if the K-1 netted to a loss but there was another source of income from the entity, the source of the other income and the related income are included. If there was K-1 income and an additional source of income, both amounts were summed to determine the code for Columns B.(1) and "Distribution" is noted in Column B.(2).

NOTE 8: Neither the income nor the cash balance at year end met the threshold for reporting. However, since the cash account is associated with either a reportable investment or financial institution that is listed separately on this report, the account is deemed reportable.

NOTE 9: There is a limited partnership interest in this entity. The Financial Disclosure Report instructions require the listing of assets held by partnerships even when the filer and her spouse cannot direct, influence or in any other manner affect the purchase, exchange, sale or disposition of the entity or property owned by the entity. As such, investment details are reported when available from the Fund. Some of the Partnerships do not name their underlying investments but rather the types of industries in which they have invested. Two Funds (Offit Capital and Park Avenue Equity) have no underlying assets listed because the Filer does not receive any type of financial statements (including a schedule of investments) from the Fund. Included information was obtained from the Funds' websites, issued reports, etc. Portfolio investments new to the Report have an (X) after the name in Column A. Preparer reported the Filer's overall value in the Partnership and the Filer's values in the underlying companies owned by the Partnership.

In cases where the Fund had a capital call or made a distribution without detail by investment, the transactions are included under the Fund line.

If the partnership had a capital call for an investment in a specific company, either "Buy" or "Buy (add'l)" is noted on that company's line. If the partnership distributed funds relatead to a specific portfolio comnpany, "Distributed (part)" or "Distributed" is listed in Column D.(1) of the portfolio company's line. If the distribution is for the sale of an underlying company and the Fund provides that information, "Sold" or Sold (Part) is noted but the capital gain is listed on the Fund's line because the Partnerhip's K-1 is the source for related capital gains. The underlying portfolio companies do not issue K-1s. If the distribution was for current income, that amount was totaled and included in Column B of the portfolio company's line.

The Partnership's K-1 is considered the source document for all income from this investment (including capital gains/losses). All K-1 activity was netted together and if greater than the required income threshold, included in Column B.(1) with Column B.(2) noting "Distribution." If the K-1 activity netted to a loss, then Column B. (1) was left blank and "None" was included in Column B.(2) unless there was a source of income separate from the K-1 in which case that income is included in Column B. There is the potential for double counting income. However, according to a Financial Disclosure Examiner, it is better to over report than to under report.

If the Partnership was terminated in 2022, same is noted in Column 1 with no year-end value reported.

NOTE 10: There are several Sentinel Funds including Sentinel IV, V and VI (combined into one Line with all portfolio companies listed below it) and the Continuation Fund. When there are both limited partner and general partner interests, the K-1 information for both interests is combined and included on the line. This approach matches the way the Funds' portfolio companies are included on this report.

Each year, there are K-1s issued for these partnerships. The K-1s summarize all of the ordinary income (loss), portfolio income, capital gains/losses, etc., for all of the underlying companies. All amounts were netted together. If the net amount was larger than the required income threshold, that amount was included in

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

Column B.(1) with Column B.(2) noting "Distribution." If the K-1 activity netted to a loss, then "None" is included in Column B.(2). Since all K-1 activity is accounted for at the partnership level, the underlying companies which are listed separately do not show any income in Column B.(1) (unless the Filer received notice that certain distributions were for current income from a specific portfoflio company in which case it is included in Column B). See NOTE 9 for additional information.

NOTE 11: Either this investment was sold or the private equity fund LP was dissolved in a prior year. So, although the reporting family received distributions (e.g. escrow, dividends, etc) and/or a K-1, there is no year-end value to report. If the entity issued a K-1, any income, including capital gains, was summed and included in Column B.(1) with Column B.(2) noting "Distribution.". To avoid double-counting, capital gains are not inlcuded in Column D.4. If there was no K-1 issued, any amounts received from investments sold in a prior year are considered capital gains and are included as such in this report.

NOTE 12: Carried interest allocation is due to a relationship with the original Vestar funds not because the reporting family made an investment in the entity. Since there is no investment in this partnership, there is no year-end value to report.

NOTE 13: The filer's is the sole shareholder of this S Corporation. The company's assets are limited to office furniture, office equipment, a checking account and a money market account. The value used to determine the year-end valuation code was the checking/money market account balances, A/R and the office furniture and equipment balance (less accumulated depreciation).

NOTE 14: All daily MMF activity was summed and if over the reporting threshold, included on this report.

NOTE 15: NOT USED.

NOTE 16: Gains/Losses on Foundation activity are included on a tax basis.

NOTE 17: Fund wrote off investment as worthless during 2022. Therefore, there is no year-end value noted.

NOTE 18: NOT USED.

NOTE 19: The reporting person's has a beneficial interest in this trust. Therefore, its assets are deemed reportable.

NOTE 20: NOT USED.

NOTE 21: Deemed contributions/distributions occur on a quarterly basis. For purposes of this report, the date noted is the last day of the quarter in which the activity occurred. If the deemed activity occurred in the latter part of 2021, the activity is dated 1/3/2022.

NOTE 22: If the entity's 2022 K-1 was not received by the time this report was filed, an estimate of the K-1 was used. Once the K-1 is received, the preparer will compare it to the estimate used. If the code used in the original report differes from what should have been used, an amended report will be filed.

NOTE 23: NOT USED.

NOTE 24: 12/31/2022 Financials for this Fund do not include the actual underlying investments. Preparer included assets as reported by Fund in its 12/31/2022 Schedule of Investments. Any income for the underlying assets is included in the Fund's 2022 K-1 and hence is reported in the Fund's line on this report. Preparer included the year end market value for the Partnership and also extrapolated the values of the underlying investments and included those market values as well. Distribution is noted on Partnereship line because no breakdown information is given when Fund makes a distribution.

NOTE 25: There is no year-end market value because the remaining shares were sold on various dates throughout the year, none of which were reportable (under reporting threshold).

NOTE 26: An additional Foundation Account was opened at Morgan Stanley (MS2) on 7/6/2022. Some of 7 different stock positions were transferred into the MS2 account (Line 1459) from the existing Morgan Stanley Foundation account (Line 1309). All such stocks in MS2 have a "(TI)" in Column 1. All positions transferred into MS2 were subsequently sold on July 7. Each of the 7 stocks continue to be held in MS1. So, preparer did not show the transfer out of MS1. The Deposit/Cash Account was opened with no funds. Hence no transaction is noted in D.

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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. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Kimba M. Wood

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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Washington, D.C. 20544