

**FINANCIAL DISCLOSURE REPORT
FOR CALENDAR YEAR 2018**

*Report Required by the Ethics
in Government Act of 1978
(5 U.S.C. app. §§ 13101-13111)*

1. Person Reporting (last name, first, middle initial) Jackson, Ketanji B.	2. Court or Organization U.S. District Court for the District of Columbia	3. Date of Report 07/11/2023
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Active District Judge	5a. Report Type (check appropriate type) <input type="checkbox"/> Nomination <input type="checkbox"/> Date <input type="checkbox"/> Initial <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Final	6. Reporting Period 01/01/2018 to 12/31/2018
	5b. <input checked="" type="checkbox"/> Amended Report	
7. Chambers or Office Address U.S. District Court for the District of Columbia 333 Constitution Ave NW Washington, D.C. 20001		
IMPORTANT NOTES: <i>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>		

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.)*

<u>POSITION</u>	<u>NAME OF ORGANIZATION/ENTITY</u>
1. Overseer	Harvard University
2. Council Member	American Law Institute
3. Board of Directors	Historical Society of the District of Columbia Circuit
4.	
5.	

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements)*

☒ NONE *(No reportable agreements.)*

<u>DATE</u>	<u>PARTIES AND TERMS</u>
1.	
2.	
3.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 8

Name of Person Reporting

Jackson, Ketanji B.

Date of Report

07/11/2023

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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (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.)*

<u>DATE</u>	<u>SOURCE</u>
1. 2018	Medstar - Salary
2. 2018	Self-employed (expert witness fees)
3.	
4.	

IV. REIMBURSEMENTS -- *transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)



NONE *(No reportable reimbursements.)*

<u>SOURCE</u>	<u>DATES</u>	<u>LOCATION</u>	<u>PURPOSE</u>	<u>ITEMS PAID OR PROVIDED</u>
1. Harvard University	1/2/18-1/6/18	Cambridge, MA	Harvard Trial Advocacy Workshop	Travel/Hotel/Meals
2. University of Pennsylvania	1/25/18-1/26/18	Philadelphia, PA	Keedy Cup Moot Court	Travel/Hotel
3. Harvard University	02/10/18- 02/11/18	Cambridge, MA	Board of Overseers Meeting	Travel/Hotel
4. American Constitution Society	3/10/18-3/11/18	Chicago, IL	Panel Presentation at ACS Convention	Travel/Hotel
5. Harvard University	3/19/18-3/20/18	Cambridge, MA	Harvard Visiting Committee	Travel/Hotel/Meals

FINANCIAL DISCLOSURE REPORT

Page 3 of 8

Name of Person Reporting

Jackson, Ketanji B.

Date of Report

07/11/2023

6.	Harvard University	4/7/18-4/8/18	Cambridge, MA	Board of Overseers Meeting	Travel/Hotel
7.	Harvard University	5/22/18-5/25/18	Cambridge, MA	Board of Overseers Meeting	Travel/Hotel
8.	Harvard University	9/22/18-9/23/18	Cambridge, MA	Board of Overseers Meeting	Travel/Hotel
9.	ALI	10/18/18-10/19/18	NY, NY	Council Meeting	Travel/Hotel
10.	JPML Conference	10/29/18-10/31/18	Palm Beach, FL	Muli-district Litigation Judicial Conference	Travel/Hotel/Meals
11.	Drexel University	11/15/18-11/16/18	Philadelphia, PA	Panel Presentation at Constitution Center	Travel/Hotel
12.	Harvard University	12/1/18-12/2/18	Cambridge, MA	Board of Overseers Meeting	Travel/Hotel

Name of Person Reporting	Date of Report
Jackson, Ketanji B.	07/11/2023

V. GIFTS. (Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☒ NONE (No reportable gifts.)

SOURCE	DESCRIPTION	VALUE
1.		
2.		
3.		
4.		
5.		

VI. LIABILITIES. (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)

☒ NONE (No reportable liabilities.)

CREDITOR	DESCRIPTION	VALUE CODE
1.		
2.		
3.		
4.		
5.		

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		C Gross value at end of reporting period		D Transactions during reporting period			
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)
1. Charles Schwab- Morrison & Foerster Retirement Plan (H)								
2. -PRIMECAP Oddessey Growth	A	Dividend	J	T				
3. -Schwab Inst LC Val Trust Fd Cls R	A	Dividend	J	T				
4. -Schwab S&P 500	A	Dividend	K	T				
5. -Janus Triton 1	A	Dividend			Sold	01/01/18	J	A
6. -Victory Integrity Sm Cap Value Y	A	Dividend	J	T				
7. -Schwab Small Cap Index	A	Dividend	J	T				
8. -Vanguard Mid Cap Index Ins	A	Dividend	J	T				
9. -Artisan International Small Cap Inv	A	Dividend			Sold	01/01/18	J	A
10. -Dodge & Cox International Stock	A	Dividend	J	T				
11. -Schwab Instl CorePlus Fixed Inc III	A	Dividend	K	T				
12. T. Rowe Price International Discovery Fund	A	Dividend	J	T	Buy	01/01/18	J	
13. -Vanguard Total Intl Stock Index	A	Dividend	J	T				
14. TIAA-Cref Money Market fund	A	Dividend	J	T				
15. Black Rock Money Market Class A	A	Dividend	J	T				
16. Black Rock Large Cap Core- Class A	A	Dividend	J	T				
17. Fidelity -Medstar Retirement Program (H)								

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	
18. -MedStar Health, Inc. Cash Balance Retirement Plan (cash)	D	Int./Div.	M	T					
19. PNC Checking	A	Interest	J	T					
20. PNC Checking		None	K	T					
21. TD Bank Checking		None	L	T					
22. The Education Plan- My 529- Age Based Portfolio	A	Int./Div.	J	T					
23. NY's 529 College Savings Program- Age Based Portfolio	A	Int./Div.	J	T					

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	

FINANCIAL DISCLOSURE REPORT

Page 7 of 8

Name of Person Reporting	Date of Report
Jackson, Ketanji B.	07/11/2023

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

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value, per page 45 of the filing instructions.

FINANCIAL DISCLOSURE REPORT

Page 8 of 8

Name of Person Reporting

Jackson, Ketanji B.

Date of Report

07/11/2023

IX. CERTIFICATION.

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. app. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ **Ketanji B. Jackson**

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544