AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Barron, David J.	United States Court of Appeals for the First Circuit	08/11/2023
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**
United States Chief Circuit Judge, Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
John J. Moakley United States Courthouse 1 Courthouse Way, Suite 7710 Boston, MA 02210		

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.	Visiting Professor	[redacted] Law School
2.	Member	American Society of International Law (ASIL) Judicial Adivsory Board
3.	Member	[redacted] College Visiting Committee
4.	Member	American Academy of Arts and Sciences
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.		

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.	2022	[redacted] University - teaching income	$29,895.00
2.	2022	LEG, Inc. dba West Academic - book royalties	$6,965.64
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	[redacted] University - salary
2.	2022	Juliette Kayyem Solutions, LLC - consulting 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.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	New York University	10/23/2022-10/25/2022	New York, NY	Lecture	Transportation, Meals, Hotel
2.	American Society of International Law (ASIL)	11/17/2022-11/18/2022	Washington, DC	Judicial Advisory Board Meeting	Transportation, Meals, Hotel
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.	[redacted] University	Tuition assistance	M
2.	Capital One	Credit Card	J
3.	Chase Bank	Credit Card	K
4.			
5.			

Name of Person Reporting	Date of Report
Barron, David J.	08/11/2023

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. Calamos Convertible (CICVX)	A	Dividend	J	T	Buy	01/05/22	J		
2.					Buy (add'l)	06/16/22	J		
3.					Buy (add'l)	09/16/22	J		
4.					Buy (add'l)	12/22/22	J		
5.					Sold (part)	01/13/22	K		
6.					Sold (part)	04/25/22	J		
7.					Sold (part)	09/27/22	J		
8. WCM Focused International Growth Fund (WCMIX)	A	Distribution	J	T	Buy	01/05/22	J		
9.					Buy (add'l)	12/08/22	J		
10.					Sold (part)	01/13/22	K		
11.					Sold (part)	03/09/22	K		
12.					Sold (part)	04/07/22	J		
13.					Sold (part)	10/03/22	J		
14. Global X FDS Nasdaq 100 (QYLD)	A	Dividend	J	T	Buy	01/13/22	J		
15.	B	Distribution			Buy (add'l)	04/25/22	J		
16.					Buy (add'l)	05/05/22	J		
17. Invesco QQQ (QQQ)	A	Dividend	K	T	Buy	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		

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18.					Buy (add'l)	04/25/22	J		
19.					Buy (add'l)	05/05/22	J		
20. Invesco Exchange-traded FD TR S&P 500 Quality ETF (SPHQ)	A	Dividend	K	T	Buy	04/07/22	J		
21.					Buy (add'l)	04/25/22	J		
22.					Buy (add'l)	05/05/22	J		
23. Invesco Exchange-Traded FD S&P 500 Equal Weight ETF (RSP)	B	Dividend	L	T	Buy	01/05/22	J		
24.					Buy (add'l)	01/13/22	J		
25. Invesco Exchange- Traded FD TR II S&P 500 Low Volatility ETF (SPLV)	A	Dividend	K	T	Buy	04/07/22	J		
26.					Buy (add'l)	04/25/22	J		
27.					Buy (add'l)	05/05/22	J		
28. IsharesTR Core S&P Mid-Cap ETF (IJH)	A	Dividend	K	T	Buy	01/05/22	J		
29.					Sold (part)	04/25/22	J		
30. Ishares TR Russell 1000 Value ETF (IWD)	A	Dividend	K	T	Buy	01/05/22	J		
31.					Sold (part)	04/25/22	J	A	
32. Ishares TR Core S&P Small-CAP ETF (IJR)	A	Dividend	K	T	Buy	01/05/22	J		
33.					Sold (part)	04/25/22	J		
34. Select Sector SPDR TR Financial (XLF)	A	Dividend			Buy	01/05/22	J		

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35.					Buy (add'l)	01/13/22	J		
36.					Sold (part)	04/07/22	J		
37.					Sold	04/07/22	J		
38. SPDR SER TR S&P 500 High Divid ETF (SPYD)	A	Dividend	K	T	Buy	01/13/22	J		
39.					Buy (add'l)	04/07/22	J		
40.					Buy (add'l)	04/25/22	J		
41.					Buy (add'l)	05/05/22	J		
42. Select Sector SPDR TR Health Care (XLV)	A	Dividend	K	T	Buy	04/07/22	J		
43.					Buy (add'l)	04/25/22	J		
44.					Buy (add'l)	05/05/22	J		
45. Energy Select Sector SPDR ETF (XLE)	B	Dividend	L	T	Buy	01/05/22	J		
46. Select Sector SPDR TR Indl (XLI)	A	Dividend	J	T	Buy	01/05/22	J		
47.					Sold (part)	01/13/22	J	A	
48.					Sold (part)	04/07/22	K		
49. Vanguard Specialized Funds Divid Appreciation ETF (VIG)	A	Dividend	K	T	Buy	04/07/22	J		
50.					Buy (add'l)	04/25/22	J		
51.					Buy (add'l)	05/05/22	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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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)	
52. Vanguard Index FDS S&P 500 ETF (VOO)	A	Dividend	L	T	Buy	01/05/22	J		
53.					Buy (add'l)	01/13/22	J		
54.					Buy (add'l)	05/05/22	J		
55. Fidelity Massachusetts Municipal Money Market Fund	A	Dividend	J	T					
56. Fidelity Select Biotechnology Portfolio		None			Sold	07/28/22	M		
57. Fidelity Government Money Market Fund	A	Dividend	J	T	Buy	07/29/22	M		
58.					Buy (add'l)	08/01/22	K		
59.					Buy (add'l)	08/15/22	K		
60.					Sold (part)	08/05/22	K		
61.					Sold (part)	08/16/22	K		
62.					Sold (part)	08/17/22	M		
63. Fidelity Select Banking Portfolio	A	Dividend	J	T	Sold (part)	07/28/22	J		
64. Fidelity Municipal Money Market Fund	A	Interest	J	T					
65. Fidelity 500 Index Fund	A	Dividend			Sold (part)	07/28/22	J		
66.					Sold	08/12/22	K	A	
67. Fidelity Cash Account	A	Interest	J	T					
68.									

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69. TIAA Traditional Annuity	B	Interest	K	T					
70. TIAA CREF Inflation-Linked Bond Fund		None	K	T					
71. TIAA CREF Stock Fund		None	N	T					
72. Vanguard S&P 500 ETF (VOO)	B	Dividend	M	T	Buy	01/15/22	J		
73.					Buy (add'l)	08/12/22	K		
74.					Buy (add'l)	08/17/22	L		
75.					Sold (part)	09/15/22	K		
76. Vanguard Federal Money Market Fund	A	Dividend			Merged (with line 77)	04/27/22	K		
77. Vanguard Treasury Mkt Inv (X)	A	Dividend	K	T					
78. Vanguard Inst Target Ret 2030 Institutional	A	Dividend			Merged (with line 80)	02/11/22	L		
79.	D	Distribution							
80. Vanguard Target Ret 2030 (X)	D	Dividend	O	T					
81.	C	Distribution							
82. Vanguard Total Bond Mkt Inst Index Fund	A	Dividend			Merged (with line 83)	12/08/22	J		
83. Inst Total Bond Mkt Index Trust Fund (X)		None	J	T					
84. Vanguard Total Bond Mkt Inst Index Fund Plus	B	Dividend	L	T					
85.	A	Distribution							

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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86. Vanguard Target Retire 2035 Trust II Fund		None			Merged (with line 87)	01/04/22	K		
87. Vanguard Target Retire 2035 Trust I Fund (X)		None	J	T					
88. Vanguard Tot Intl Stock 1x Inst Fund	A	Dividend			Merged (with line 89)	12/08/22	J		
89. Inst Total Intl Stock Mkt lx Trust Fund (X)		None	J	T					
90. Vanguard Inst Index Fund Inst Plus	A	Dividend			Merged (with line 91)	12/08/22	K		
91. Inst 500 Index Trust (X)		None	K	T					
92. Vanguard Extended Mkt Index Inst Fund	A	Dividend			Merged (with line 93)	12/08/22	J		
93. Vanguard Inst Ext Market Index Trust Fund		None	J	T					
94. Vanguard Target Retirement 2040 Fund	C	Dividend	M	T					
95.	A	Distribution							
96. Vanguard Inst Target Ret 2035 Inv Fund	A	Dividend			Merged (with line 98)	02/11/22	N		
97.	A	Distribution							
98. Vanguard Target Ret 35 Inst Fund (X)	D	Dividend	N	T					
99.	D	Distribution							
100. Juliette Kayyem Solutions LLC Individual 401(K) (H)									
101. - Vanguard Target Retirement 2040 Fund (VFORX)	D	Dividend	N	T					
102.	B	Distribution							

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103.									
104. The Girls, LLC (H)									
105. - AMGEN INC (AMGN) common stock	C	Dividend	M	T					
106. - APPLE INC. (AAPL) common stock	B	Dividend	M	T					
107. - BANK OF AMERICA CORP. (BAC) common stock	B	Dividend	M	T					
108. -CARRIER GLOBAL CORP (CARR) common stock	A	Dividend	J	T					
109. -EXPEDITORS INTL WASH INC (EXPD) common stock	B	Dividend	M	T					
110. -JPMORGAN CHASE & CO (JPM) common stock	B	Dividend	L	T					
111. -ISHARES BIOTECH ETF (IBB)	A	Dividend	L	T					
112. -ISHARES SELECT DIVIDEND ETF (DVY)	B	Dividend	L	T					
113. -OTIS WORLDWIDE CORP (OTIS) common stock	A	Dividend	J	T					
114. -RTX (RTX) (Formerly Raytheon Technologies)	A	Dividend	K	T					
115. -MORGAN STANLEY PRIVATE BANK CASH ACCOUNT	A	Interest	L	T					
116. -ZEMCAR INC dba Grip Mobility common stock		None	K	U					
117. Juliette Kayyem Solutions, LLC - See explanation in Part VIII		None	N	T					
118. U.S. Government Securities - Series EE Bonds	A	Interest	J	T					
119. FOK Holdings LLC (H) - See explanation in Part VIII									

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
Barron, David J.	08/11/2023

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. - Rental Property, Hellertown, PA (value) See explanation in Part VIII	G	Rent	P1	V					
121. - Rental Property, Lebanon, PA (value) - See explanation in Part VIII	G	Rent	P1	V					
122. - Rental Property, Punxutawney, PA (value) - See expl. in Part VIII	G	Rent	P1	V					
123. [redacted] Irrevocable Trust (H)									
124. -INHBRX Inc. common stock		None	N	T					
125. ARMORED THINGS Inc. common stock		None	J	U					
126. EVOLV TECHNOLOGIES, INC.		None			Sold	03/17/22	K	D	
127. INHIBRX Inc. common stock		None	P1	T					
128. ZEMCAR INC dba Grip Mobility common stock		None	P1	U					
129. Bank of America, cash accounts	A	Interest	L	T					
130. Jefferies LLC, cash account	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
	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.)*

Part VII:

Line 117: In accord with the advice of the Financial Disclosure Office, no income is reported for Juliette Kayyem Solutions LLC in column B, given the nature of its holdings. The total value of assets of the LLC is reflected by the valuation in Column C.

Line 119: On advice of the Financial Disclosure Office, the liabilities of this entity are not listed in Part VI in light of the nature of the reportable interest of the LLC being a future interest.

Lines 120-122: Fair market value of the real estate properties was determined by comparable sales prices in each area.

Name of Person Reporting	Date of Report
Barron, David J.	08/11/2023

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/ David J. Barron

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)

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