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
Lynch, Sandra L.	U.S. Court of Appeals, 1st Cir	03/21/2023
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. Circuit Judge (active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
United States Courthouse 1 Courthouse Way, Suite 8710 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.		
2.		
3.		
4.		
5.		

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

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE
1.	2022	Self-employed consultant-expert withness fees
2.		
3.		
4.		

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

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

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

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

☑ NONE *(No reportable gifts.)*

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

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

☑ NONE *(No reportable liabilities.)*

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

Name of Person Reporting	Date of Report
Lynch, Sandra L.	03/21/2023

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 Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period (1) Amount Code 1 (A-H)	B (2) Type (e g , div , rent, or int)	C Gross value at end of reporting period (1) Value Code 2 (J-P)	C (2) Value Method Code 3 (Q-W)	D Transactions during reporting period (1) Type (e g , buy, sell, redemption)	D (2) Date mm/dd/yy	D (3) Value Code 2 (J-P)	D (4) Gain Code 1 (A-H)	
1. Fidelity Mass Muni MM	A	Int./Div.			Distributed	08/01/22	M		
2. Bank of America	A	Interest	N	T					
3. ROLLOVER IRA (H)					Closed	08/03/22	J		
4. - Fidelity Disciplined Equity					Distributed	08/03/22	N		
5. - Fidelity Government Cash Reserves Fund	A	Interest			Distributed	08/03/22	J		
6. Fidelity-[redacted] (H)									
7. -Fidelity Investments Core Cash	A	Interest	O	T					
8. -Fidelity Mass Muni MM	A	Interest			Spinoff (from line 1)	08/01/22	M		
9.					Merged (with line 10)	09/16/22	M		
10. -Fidelity MA AMT Tax-free Money Mkt	A	Interest	M	T					
11. -United States Treas NTS Note	E	Interest	P1	T	Buy	08/02/22	P1		
12. TRADITIONAL IRA (H)									
13. - Fidelity Capital and Income	A	Dividend	J	T	Sold (part)	01/12/22	J	A	
14.					Sold (part)	03/14/22	J	B	
15.					Sold (part)	06/08/22	J	B	
16. - Fidelity Advisor Strategic Inc CL I	A	Dividend	J	T	Sold (part)	02/16/22	J	B	
17.					Sold (part)	07/01/22	J	B	

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		

Name of Person Reporting	Date of Report
Lynch, Sandra L.	03/21/2023

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)	
18.					Buy (add'l)	09/15/22	J		
19.					Sold (part)	10/28/22	J	A	
20. - Strategic ADV Int'l II FD	D	Dividend	M	T	Sold (part)	01/12/22	J	A	
21.					Buy (add'l)	02/01/22	J		
22.					Sold (part)	02/16/22	J	A	
23.					Buy (add'l)	03/01/22	J		
24.					Buy (add'l)	03/07/22	J		
25.					Sold (part)	03/14/22	J	A	
26.					Sold (part)	04/07/22	J	A	
27.					Sold (part)	06/08/22	J	A	
28.					Sold (part)	07/01/22	J	A	
29.					Sold (part)	08/03/22	J	A	
30.					Buy (add'l)	08/05/22	K		
31.					Sold (part)	10/28/22	J	A	
32.					Sold (part)	11/07/22	J	A	
33.					Sold (part)	12/08/22	J	A	
34. -Fidelity Real Estate Income	A	Dividend			Buy (add'l)	01/12/22	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
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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35.					Sold (part)	02/01/22	J	A	
36.					Sold (part)	04/07/22	J	A	
37.					Sold (part)	06/08/22	J	B	
38.					Sold (part)	07/01/22	J	B	
39.					Sold	08/03/22	J	B	
40. -Fidelity SAI Emerg Markets Index	A	Dividend	J	T	Sold (part)	06/08/22	J	A	
41.					Buy (add'l)	07/01/22	J		
42.					Sold (part)	08/03/22	J	A	
43.					Buy (add'l)	08/05/22	J		
44. - Fidelity Government Cash Reserves Fund	A	Interest	K	T	Spinoff (from line 397)	08/01/22	J		
45.					Spinoff (from line 5)	08/03/22	K		
46. - Strategic Advisers Fid Emerging Markets	B	Dividend	L	T	Buy (add'l)	03/01/22	J		
47.					Buy (add'l)	03/07/22	J		
48.					Buy (add'l)	03/14/22	J		
49.					Sold (part)	04/07/22	J	A	
50.					Sold (part)	06/08/22	J	A	
51.					Buy (add'l)	07/01/22	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		
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52.					Buy (add'l)	08/03/22	J		
53.					Buy (add'l)	08/05/22	K		
54.					Sold (part)	09/15/22	J	A	
55.					Sold (part)	10/28/22	J	A	
56.					Buy (add'l)	11/07/22	J		
57.					Sold (part)	12/08/22	J	A	
58. - Strategic Advisers Fid US Total Stock	E	Dividend	O	T	Sold (part)	01/12/22	J	A	
59.					Buy (add'l)	02/01/22	K		
60.					Sold (part)	02/16/22	J	A	
61.					Sold (part)	03/01/22	J	A	
62.					Buy (add'l)	03/14/22	J		
63.					Sold (part)	04/07/22	K	E	
64.					Buy (add'l)	05/11/22	K		
65.					Sold (part)	06/08/22	J	A	
66.					Buy (add'l)	07/01/22	K		
67.					Sold (part)	08/03/22	K	A	
68.					Buy (add'l)	08/05/22	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
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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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69.					Buy (add'l)	09/15/22	J		
70.					Sold (part)	10/28/22	K	A	
71. - Strategic Adviser Fidelity Core Income	E	Dividend	O	T	Buy (add'l)	01/12/22	J		
72.					Sold (part)	02/01/22	K	A	
73.					Buy (add'l)	02/16/22	J		
74.					Sold (part)	03/01/22	J	A	
75.					Sold (part)	03/07/22	J	A	
76.					Buy (add'l)	03/14/22	J		
77.					Buy (add'l)	04/07/22	K		
78.					Sold (part)	05/11/22	J	A	
79.					Buy (add'l)	06/08/22	K		
80.					Sold (part)	07/01/22	J	A	
81.					Buy (add'l)	08/03/22	K		
82.					Buy (add'l)	08/05/22	M		
83.					Buy (add'l)	09/15/22	J		
84.					Sold (part)	10/11/22	J	A	
85.					Sold (part)	10/28/22	K	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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86.					Buy (add'l)	11/07/22	K		
87.					Buy (add'l)	12/08/22	J		
88. -Fidelity Real Estate Investment	A	Dividend			Sold (part)	03/07/22	J	A	
89.					Sold (part)	07/01/22	J	A	
90.					Sold (part)	08/03/22	J	A	
91.					Buy (add'l)	08/05/22	J		
92.					Sold (part)	09/15/22	J	A	
93.					Sold	10/11/22	J	B	
94. -Fidelity Sai Short Term Bond Fund	A	Dividend	L	T	Sold (part)	03/01/22	J	A	
95.					Buy (add'l)	04/07/22	J		
96.					Sold (part)	05/11/22	J	A	
97.					Buy (add'l)	06/08/22	J		
98.					Sold (part)	07/01/22	J	A	
99.					Buy (add'l)	08/05/22	J		
100.					Sold (part)	09/15/22	J	A	
101.					Sold (part)	10/28/22	J	A	
102.					Buy (add'l)	11/07/22	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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3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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103.					Buy (add'l)	12/08/22	J		
104. -Fidelity Sai Low Duration Income Fund	A	Dividend	L	T	Sold (part)	02/01/22	J	A	
105.					Sold (part)	03/07/22	J	A	
106.					Sold (part)	05/11/22	J	A	
107.					Buy (add'l)	06/08/22	J		
108.					Sold (part)	07/01/22	J	A	
109.					Buy (add'l)	08/03/22	J		
110.					Buy (add'l)	08/05/22	K		
111.					Sold (part)	09/15/22	J	A	
112.					Sold (part)	10/11/22	J	A	
113.					Sold (part)	10/28/22	J	A	
114.					Buy (add'l)	11/07/22	J		
115.					Buy (add'l)	12/08/22	J		
116. -Fid SAI Long Term Treasury Bond Index Fund	A	Dividend			Sold (part)	01/12/22	J	A	
117.					Buy (add'l)	04/07/22	J		
118.					Sold (part)	05/11/22	J	A	
119.					Sold (part)	06/08/22	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
	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
Lynch, Sandra L.	03/21/2023

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)	08/03/22	J		
121.					Buy (add'l)	08/05/22	J		
122.					Buy (add'l)	09/15/22	J		
123.					Sold	11/07/22	K	A	
124. -Fidelity SAI High Income Fund	B	Dividend	K	T	Sold (part)	01/12/22	J	A	
125.					Sold (part)	02/16/22	J	A	
126.					Sold (part)	03/14/22	J	A	
127.					Sold (part)	04/07/22	J	A	
128.					Sold (part)	05/11/22	J	A	
129.					Sold (part)	06/08/22	J	A	
130.					Sold (part)	07/01/22	J	A	
131.					Buy (add'l)	08/05/22	J		
132.					Sold (part)	10/11/22	J	A	
133. -Fidelity SAI US Treasury Bond Index	A	Dividend			Buy	05/11/22	J		
134.					Buy (add'l)	06/08/22	J		
135.					Sold (part)	08/03/22	J	A	
136.					Buy (add'l)	08/05/22	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	
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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)	
137.					Sold	09/15/22	J	A	
138. - Fidelity Disciplined Equity					Spinoff (from line 4)	08/03/22	N		
139.					Sold	08/05/22	N	G	
140. -Fidelity SAI Inflation Focused Fd	B	Dividend	J	T	Buy	02/16/22	J		
141.					Buy (add'l)	03/07/22	J		
142.					Buy (add'l)	03/14/22	J		
143.					Buy (add'l)	04/07/22	J		
144.					Buy (add'l)	05/11/22	J		
145.					Buy (add'l)	07/01/22	J		
146.					Sold (part)	08/03/22	J	A	
147.					Buy (add'l)	08/05/22	J		
148.					Sold (part)	10/28/22	J	A	
149.					Sold (part)	12/08/22	J	A	
150. Esplanade Capital Ptnrs I LLC (See note section VIII)	F	Int./Div.	N	U					
151. PAS BROKERAGE ACCOUNT(H)									
152. - Fidelity Municipal Income	A	Dividend	K	T	Sold (part)	03/02/22	J	A	
153. -DWS Strategic High Yld Tax	A	Dividend	J	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

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154. -DWS Managed Muni Bond FD S	A	Dividend			Sold (part)	03/02/22	L	A	
155.					Sold (part)	05/20/22	J	A	
156.					Buy (add'l)	08/02/22	J		
157.					Sold	09/02/22	J	A	
158. -Fidelity Advisor Int'l Discovery CL I	A	Dividend	J	T					
159. -Champlain Small Co. Fund Adv CL Conf	A	Dividend	J	T					
160. -Artisan Intl Value Fund Inv CL	A	Dividend	J	T	Buy (add'l)	03/02/22	J		
161.					Sold (part)	04/19/22	J	A	
162.					Sold (part)	11/15/22	J	A	
163. -Baron Growth	A	Dividend	J	T					
164. -JPMorgan Mid-Cap Value Fn Select CL	A	Dividend	J	T					
165. AHotchkins & Wiley Mid Cap Value CL A	A	Dividend	J	T					
166. -Fidelity Mass Muni Income	A	Dividend			Sold (part)	04/19/22	J	A	
167.					Sold	05/20/22	K	A	
168. -MFS International Intrinsic Value CL A	B	Dividend	J	T					
169. -MFS Muni Mass Cl A	A	Dividend			Sold (part)	04/19/22	K	A	
170.					Sold	05/20/22	J	A	

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171. -MFS Research Int'l Cl A	A	Dividend	J	T	Buy (add'l)	06/22/22	J		
172.					Sold (part)	09/02/22	J	A	
173.					Buy (add'l)	10/04/22	J		
174. -Primecap Odyssey Growth	A	Dividend	J	T					
175. -SPDR S&P 500 ETF	A	Dividend	K	T					
176. -IShares Russell 1000 Value ETF	A	Dividend	K	T					
177. -IShares Russell 1000 Growth ETF	A	Dividend	L	T					
178. -Ishares Core S&P Small-cap ETF	A	Dividend			Sold (part)	10/20/22	J	A	
179.					Sold	11/16/22	J	B	
180. -Fidelity Emerging Markets	A	Dividend	J	T					
181. -Acadian emerging Markets Port Instl	A	Dividend	J	T	Sold (part)	06/22/22	J	A	
182. -Janus Henderson Enterprise Fund Class					Sold (part)	10/19/22	J	A	
183.					Sold	11/15/22	J	A	
184. -Ishares Russell 1000 Index Fund	B	Dividend	L	T	Sold (part)	11/16/22	J	B	
185. -Vanguard Index Fds Vanguard Value	A	Dividend	K	T					
186. -T Rowe Price EMERG Markets Stock Fund I	A	Dividend	J	T					
187. -T Rowe Price International STK I	A	Dividend	J	T	Sold (part)	11/15/22	J	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	
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188. -Mainstay Mackay Tax Free Bond Class A	A	Dividend			Sold (part)	01/05/22	J	A	
189.					Sold	04/19/22	J	A	
190. -Fidelity Government Cash Reserves Fund	A	Interest	K	T	Buy (add'l)	01/03/22	J		
191.					Sold (part)	01/05/22	J	A	
192.					Buy (add'l)	01/06/22	J		
193.					Buy (add'l)	01/26/22	J		
194.					Buy (add'l)	01/31/22	J		
195.					Buy (add'l)	02/01/22	J		
196.					Buy (add'l)	02/23/22	J		
197.					Sold (part)	02/25/22	J	A	
198.					Buy (add'l)	02/28/22	J		
199.					Buy (add'l)	03/01/22	J		
200.					Buy (add'l)	03/02/22	J		
201.					Sold (part)	03/02/22	J	A	
202.					Sold (part)	03/03/22	J	A	
203.					Buy (add'l)	03/28/22	J		
204.					Buy (add'l)	03/30/22	J		

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205.					Buy (add'l)	03/31/22	J		
206.					Buy (add'l)	04/01/22	J		
207.					Sold (part)	04/19/22	J	A	
208.					Buy (add'l)	04/20/22	J		
209.					Buy (add'l)	04/26/22	J		
210.					Buy (add'l)	04/29/22	J		
211.					Buy (add'l)	05/02/22	J		
212.					Sold (part)	05/13/22	J	A	
213.					Buy (add'l)	05/19/22	J		
214.					Buy (add'l)	05/20/22	J		
215.					Sold (part)	05/23/22	J	A	
216.					Buy (add'l)	05/25/22	J		
217.					Buy (add'l)	05/31/22	J		
218.					Buy (add'l)	06/01/22	J		
219.					Buy (add'l)	06/15/22	J		
220.					Buy (add'l)	06/22/22	J		
221.					Sold (part)	06/22/22	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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222.					Buy (add'l)	06/23/22	J		
223.					Buy (add'l)	06/27/22	J		
224.					Buy (add'l)	06/28/22	J		
225.					Buy (add'l)	06/29/22	J		
226.					Buy (add'l)	06/30/22	J		
227.					Buy (add'l)	07/01/22	J		
228.					Buy (add'l)	07/26/22	J		
229.					Buy (add'l)	07/29/22	J		
230.					Buy (add'l)	08/01/22	J		
231.					Buy (add'l)	08/02/22	J		
232.					Sold (part)	08/03/22	J	A	
233.					Sold (part)	08/09/22	J	A	
234.					Buy (add'l)	08/10/22	J		
235.					Buy (add'l)	08/26/22	J		
236.					Buy (add'l)	08/31/22	J		
237.					Buy (add'l)	09/01/22	J		
238.					Buy (add'l)	09/02/22	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
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239.					Sold (part)	09/06/22	L	A	
240.					Buy (add'l)	09/08/22	J		
241.					Sold (part)	09/12/22	J	A	
242.					Buy (add'l)	09/16/22	J		
243.					Buy (add'l)	09/27/22	J		
244.					Buy (add'l)	09/28/22	J		
245.					Buy (add'l)	09/29/22	J		
246.					Buy (add'l)	09/30/22	J		
247.					Buy (add'l)	10/03/22	J		
248.					Sold (part)	10/04/22	K	A	
249.					Buy (add'l)	10/05/22	K		
250.					Buy (add'l)	10/07/22	J		
251.					Buy (add'l)	10/18/22	J		
252.					Buy (add'l)	10/19/22	K		
253.					Sold (part)	10/20/22	K	A	
254.					Buy (add'l)	10/26/22	J		
255.					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	
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
Lynch, Sandra L.	03/21/2023

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)	11/01/22	J		
257.					Buy (add'l)	11/07/22	J		
258.					Sold (part)	11/11/22	J	A	
259.					Sold (part)	11/15/22	J	A	
260.					Buy (add'l)	11/16/22	J		
261.					Buy (add'l)	11/25/22	J		
262.					Buy (add'l)	11/30/22	J		
263.					Buy (add'l)	12/01/22	J		
264.					Buy (add'l)	12/06/22	J		
265.					Buy (add'l)	12/07/22	J		
266.					Buy (add'l)	12/09/22	J		
267.					Buy (add'l)	12/12/22	J		
268.					Buy (add'l)	12/13/22	J		
269.					Buy (add'l)	12/14/22	J		
270.					Buy (add'l)	12/15/22	J		
271.					Buy (add'l)	12/16/22	J		
272.					Sold (part)	12/16/22	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		
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
Lynch, Sandra L.	03/21/2023

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)	12/19/22	J	A	
274.					Buy (add'l)	12/20/22	J		
275.					Buy (add'l)	12/21/22	J		
276.					Buy (add'l)	12/23/22	J		
277.					Buy (add'l)	12/27/22	J		
278.					Buy (add'l)	12/28/22	J		
279.					Buy (add'l)	12/29/22	J		
280.					Buy (add'l)	12/30/22	J		
281. -Strategic Adv Tax Sensitive Short Dura	A	Dividend	L	T	Buy (add'l)	01/05/22	J		
282.					Sold (part)	03/02/22	J	A	
283.					Sold (part)	05/20/22	K	A	
284.					Sold (part)	06/22/22	J	A	
285.					Buy (add'l)	08/02/22	J		
286.					Sold (part)	09/02/22	J	A	
287.					Sold (part)	10/04/22	J	A	
288.					Buy (add'l)	11/15/22	J		
289.					Sold (part)	12/16/22	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
Lynch, Sandra L.	03/21/2023

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				
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290. -Fidelity Advisor Intl Growth Cl Z	A	Dividend	J	T					
291. -Ishares Tr US Treas Bd EEF	A	Dividend	K	T	Buy (add'l)	10/20/22	K		
292.					Buy (add'l)	11/16/22	J		
293. -Dodge & Cox Internatl Stock Fund	A	Dividend	J	T					
294. -Goldman Sachs Emerg Mrkts Eq Instl Cl	A	Dividend	J	T					
295. -Hotchkis & Wiley Large Cap Value Cl A	A	Dividend	J	T					
296. -Ishares Russell 2000 ETF	A	Dividend	J	T					
297. -Ishares Tr Eafe Sml Cp ETF	A	Dividend	J	T	Buy (add'l)	10/05/22	J		
298.					Buy (add'l)	12/19/22	J		
299. -Ishares Tr Eafe Value ETF	A	Dividend	J	T	Buy (add'l)	10/05/22	J		
300.					Sold (part)	10/20/22	J	A	
301. -Jpmorgan US Equity Fund Class	A	Dividend	J	T					
302. -Mfs Municipal Income Class A	A	Dividend			Sold (part)	03/02/22	K	A	
303.					Sold	04/19/22	K	A	
304. -Vanguard Real Estate ETF	A	Dividend			Sold (part)	01/06/22	J	A	
305.					Buy (add'l)	03/03/22	J		
306.					Sold (part)	04/20/22	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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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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307.					Sold (part)	04/20/22	J	A	
308.					Sold (part)	05/23/22	J	A	
309.					Sold (part)	06/23/22	J	A	
310.					Sold	08/03/22	J	A	
311. -William Blair Internat'l Growth	A	Dividend			Merged (with line 341)	08/24/22	J		
312. -DFA Emerging MRKTS CORE EQUPORTF	A	Dividend	J	T	Sold (part)	04/19/22	J	A	
313.					Buy (add'l)	05/20/22	J		
314.					Sold (part)	06/22/22	J	A	
315.					Buy (add'l)	10/04/22	J		
316.					Sold (part)	11/15/22	J	A	
317. -Dimensional Emerging MKTS Val Prtf Instl	A	Dividend			Buy (add'l)	04/19/22	J		
318.					Sold	05/20/22	J	A	
319. -Hartford Growth Opport FD CL I					Sold (part)	08/09/22	J	A	
320.					Merged (with line 342)	09/07/22	J		
321. -Hartford Schroder Emerg Mkts EQ CL Y					Buy (add'l)	01/05/22	J		
322.					Sold (part)	03/02/22	J	A	
323.					Buy (add'l)	04/19/22	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
Lynch, Sandra L.	03/21/2023

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324.					Sold (part)	05/20/22	J	A	
325.					Buy (add'l)	06/22/22	J		
326.					Buy (add'l)	08/09/22	J		
327.					Buy (add'l)	09/02/22	J		
328.					Merged (with line 344)	09/07/22	J		
329. -T. Rowe Price Equity Income CL I	A	Dividend	J	T					
330. -SAI Municipal Bond Fund	C	Dividend	M	T	Buy (add'l)	01/05/22	J		
331.					Buy (add'l)	03/02/22	L		
332.					Buy (add'l)	04/19/22	L		
333.					Sold (part)	05/20/22	J	A	
334.					Buy (add'l)	06/22/22	J		
335.					Sold (part)	08/02/22	L	A	
336.					Sold (part)	08/09/22	J	A	
337.					Buy (add'l)	10/04/22	L		
338.					Buy (add'l)	10/19/22	J		
339.					Sold (part)	12/16/22	J	A	
340. -T Rowe Price Tax free income cl I	A	Int./Div.			Sold	05/20/22	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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341. -William Blair INT'L Growth Fund CL N	A	Dividend	J	T					
342. -Hartford Growth Opp Fund CL A			J	T					
343.					Buy (add'l)	11/15/22	J		
344. -Hartford Schrooders EM mkts Eq SDR	A	Dividend	J	T	Sold (part)	10/04/22	J	A	
345.					Buy (add'l)	12/16/22	J		
346. Pear Tree Polaris FRGN Value Fund	A	Dividend	J	T	Buy	10/04/22	J		
347. Vanguard Mas Tax Exempt Fund	A	Dividend	L	T	Buy	04/19/22	K		
348.					Sold (part)	05/20/22	L	A	
349.					Buy (add'l)	10/04/22	L		
350.					Buy (add'l)	10/19/22	J		
351.					Buy (add'l)	11/15/22	J		
352. Ishares National Muni Bond ETF	A	Dividend	J	T	Buy	08/03/22	K		
353.					Buy (add'l)	08/10/22	J		
354.					Buy (add'l)	09/06/22	L		
355.					Sold (part)	10/05/22	L	A	
356.					Buy (add'l)	11/16/22	J		
357. -Fidelity Overseas Fund					Buy	05/20/22	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		
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358.					Sold	06/22/22	J	A	
359. -Fidelity SAI US Treasury Bond Index Fund	A	Dividend			Buy	05/20/22	K		
360.					Buy (add'l)	06/22/22	J		
361.					Buy (add'l)	08/02/22	J		
362.					Sold	10/19/22	K	A	
363. -Blackrock National Muni Fund CL A	A	Dividend			Buy	08/02/22	J		
364.					Sold	09/02/22	J		
365. -Causeway Emerging Mrkts FD INV					Buy	08/02/22	J		
366.					Buy (add'l)	08/09/22	J		
367.					Sold	10/04/22	J		
368. -Dimensional ETF Trust EMERG CRE	A	Dividend			Buy	05/23/22	J		
369.					Sold (part)	08/03/22	J	A	
370.					Sold	08/10/22	J		
371. -Harbor INTL INST CL					Buy	03/02/22	J		
372.					Sold (part)	04/19/22	J	A	
373.					Buy (add'l)	06/22/22	J		
374.					Sold (part)	08/02/22	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
Lynch, Sandra L.	03/21/2023

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)	08/09/22	J	A	
376.					Sold (part)	09/02/22	J	A	
377.					Sold	10/04/22	J		
378. -Oakmark INTL Investors CL					Buy	05/20/22	J		
379.					Sold (part)	06/22/22	J	A	
380.					Buy (add'l)	09/02/22	J		
381.					Sold	10/04/22	J		
382. -Mainstay Macay High Yield Muni BD A	A	Dividend			Buy	08/02/22	J		
383.					Sold	09/02/22	J		
384. Nuveen Massachusetts Municpal Bond Fund	A	Dividend			Buy	05/20/22	L		
385.					Buy (add'l)	06/22/22	J		
386.					Buy (add'l)	08/02/22	J		
387.					Buy (add'l)	08/09/22	J		
388.					Buy (add'l)	09/02/22	J		
389.					Sold	10/04/22	L		
390. Schwab Strategic TR US REIT ETF		None			Buy	05/23/22	J		
391.					Sold	06/23/22	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	
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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)	
392. Vanguard Long Term Tax Exempt	A	Dividend			Buy	08/02/22	K		
393.					Sold	09/02/22	K		
394. -Allspring Municpal Bond Fund	A	Dividend			Buy	08/02/22	J		
395.					Sold	09/02/22	J		
396. IRA ROLLOVER ACCT NO 2(H)					Closed	08/01/22	J		
397. -Fidelity Government Cash Reserves Fund	A	Interest			Distributed	08/01/22	J		
398. SI INVEST ACCOUNT (IRA) (H)									
399. -Schwab US Treas Money Fund	A	Interest	N	T					
400. -American Express	A	Dividend	K	T	Sold (part)	07/25/22	K	D	
401. -Apple Inc Com	B	Dividend	M	T	Sold (part)	07/25/22	M	F	
402. -Caterpillar Inc Del	B	Dividend	K	T	Sold (part)	07/25/22	K	D	
403. -Emerson Electric	B	Dividend	K	T	Sold (part)	07/25/22	K	C	
404. -Exxon Mobil Corp	C	Dividend	L	T	Sold (part)	07/25/22	K	A	
405. -Goldman Sachs Group Com	C	Dividend	M	T	Sold (part)	07/25/22	L	E	
406. -J P Morgan Chase & Co	C	Dividend	L	T	Sold (part)	07/25/22	L	E	
407. -Mondelez Intl Inc Cl A	B	Dividend	L	T	Sold (part)	07/25/22	K	E	
408. -Oracle Corp	B	Dividend	L	T	Sold (part)	07/25/22	L	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	
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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)	
409. -Salesforce Com Inc Com		None	K	T	Sold (part)	07/25/22	K	E	
410. -Schlumberger	A	Dividend	K	T	Sold (part)	07/25/22	K	A	
411. -Thermo Fisher Scientific Inc	A	Dividend	L	T	Sold (part)	07/25/22	L	F	
412. -Verizon Communications Com	C	Dividend	L	T	Sold (part)	07/25/22	K	A	
413. -Alphabet Inc. CL C		None	L	T	Sold (part)	07/25/22	L	E	
414. -Coca-Cola Company	B	Dividend	L	T	Sold (part)	07/25/22	K	D	
415. -Diageo PL C Spon ADR new	B	Dividend	K	T	Sold (part)	07/25/22	K	D	
416. -Johnson & Johnson Com	C	Dividend	L	T	Sold (part)	07/25/22	K	E	
417. -Pfizer Inc	B	Dividend	K	T	Sold (part)	07/25/22	K	D	
418. -Broadcom Ltd Shs	C	Dividend	L	T	Sold (part)	07/25/22	K	E	
419. -Wal Mart Stores	B	Dividend	L	T	Sold (part)	07/25/22	K	D	
420. -General Motors Corp Com	A	Dividend	J	T	Sold (part)	07/25/22	J	A	
421. -US Treasury Bill		None	N	T	Buy	07/27/22	O		
422. First Republic Bank	A	Interest	L	T					
423. Citizens Bank	A	Interest	L	T	Open	07/13/22	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
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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

PART VII-Esplande Capital ptnrs I LLC is a non-publically trade LLC. The net income from the investment is reported as dividend.
Part VII- line 6 Fidelity- (H) is added. Before 2022, this account only have Fidelity Investments Core Cash assets, listed in line 7. In 2022, line 1 Fidelity Mass Muni MM was distributed and added to Fidelity- account.

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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/ Sandra L. Lynch

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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