AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

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
Lynch, Sandra L.	U.S. Court of Appeals, 1st Cir	10/22/2024
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 (senior)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2023 **to** 12/31/2023
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.	2023	Self-employed consultant-expert witness 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.	10/22/2024

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. Bank of America	A	Interest	N	T					
2. Fidelity-[redacted] (H)									
3. -Fidelity Investments Core Cash	B	Interest	L	T					
4. -Fidelity MA AMT Tax-free Money Mkt	E	Interest			Buy (add'l)	01/05/23	O		
5.					Sold (part)	01/06/23	J	A	
6.					Sold (part)	01/10/23	J	A	
7.					Sold (part)	01/31/23	J	A	
8.					Sold (part)	02/08/23	J	A	
9.					Sold (part)	04/03/23	J	A	
10.					Sold (part)	04/06/23	J	A	
11.					Sold (part)	04/18/23	K	A	
12.					Sold (part)	04/24/23	J	A	
13.					Sold (part)	05/01/23	J	A	
14.					Sold (part)	05/05/23	J	A	
15.					Sold (part)	05/11/23	J	A	
16.					Sold (part)	05/07/23	J	A	
17.					Sold (part)	05/19/23	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; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Lynch, Sandra L.	10/22/2024

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)	
18.					Sold (part)	05/22/23	J	A	
19.					Sold (part)	05/24/23	J	A	
20.					Sold (part)	05/25/23	J	A	
21.					Sold (part)	05/30/23	J	A	
22.					Sold (part)	06/07/23	J	A	
23.					Sold (part)	06/08/23	K	A	
24.					Sold (part)	06/13/23	J	A	
25.					Sold (part)	06/27/23	J	A	
26.					Sold (part)	07/11/23	J	A	
27.					Sold (part)	07/17/23	J	A	
28.					Sold (part)	08/08/23	J	A	
29.					Sold (part)	09/01/23	J	A	
30.					Sold (part)	09/05/23	J	A	
31.					Sold (part)	09/07/23	L	A	
32.					Sold (part)	09/08/23	J	A	
33.					Sold (part)	09/19/23	J	A	
34.					Sold (part)	10/02/23	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
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35.					Sold (part)	10/03/23	J	A	
36.					Sold (part)	10/04/23	J	A	
37.					Buy (add'l)	11/03/23	O		
38.					Sold (part)	11/03/23	O	A	
39.					Sold (part)	11/06/23	J	A	
40.					Sold (part)	11/07/23	J	A	
41.					Sold (part)	11/08/23	J	A	
42.					Sold	11/27/23	O	A	
43.	-United States Treas NTS Note	E	Interest			Matured	08/15/23	P1		
44.	-FIMM Money Market Portfolio: CL I	E	Interest	P1	T	Buy	08/17/23	P1		
45.						Buy (add'l)	11/27/23	P1		
46.	TRADITIONAL IRA (H)									
47.	- Fidelity Capital and Income	A	Dividend	J	T					
48.	- Fidelity Advisor Strategic Inc CL I	A	Dividend	J	T	Buy (add'l)	02/09/23	J		
49.						Sold (part)	04/05/23	J	A	
50.						Buy (add'l)	06/26/23	J		
51.	- Strategic ADV Int'l II FD	D	Dividend	M	T	Sold (part)	01/01/23	J	A	

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52.					Sold (part)	01/31/23	J	A	
53.					Sold (part)	04/05/23	J	A	
54.					Sold (part)	05/23/23	J	A	
55.					Sold (part)	06/26/23	J	A	
56.					Buy (add'l)	08/14/23	J		
57.					Buy (add'l)	09/29/23	J		
58.					Buy (add'l)	11/16/23	J		
59.					Sold (part)	11/29/23	J	A	
60.	-Fidelity SAI Emerg Markets Index	A	Dividend	J	T	Sold (part)	01/10/23	J	A	
61.	- Fidelity Government Cash Reserves Fund	B	Interest	K	T					
62.	- Strategic Advisers Fid Emerging Markets	B	Dividend	L	T	Sold (part)	01/10/23	J	A	
63.						Sold (part)	01/31/23	J	A	
64.						Buy (add'l)	02/09/23	J		
65.						Sold (part)	05/23/23	J	A	
66.						Buy (add'l)	09/29/23	J		
67.						Sold (part)	11/16/23	J	A	
68.						Sold (part)	11/29/23	J	A	

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69. - Strategic Advisers Fid US Total Stock	E	Dividend	O	T	Sold (part)	01/31/23	K	A	
70.					Sold (part)	02/09/23	K	A	
71.					Sold (part)	05/23/23	K	A	
72.					Sold (part)	06/26/23	J	A	
73.					Buy (add'l)	08/14/23	J		
74.					Buy (add'l)	09/29/23	J		
75.					Sold (part)	11/16/23	K	B	
76.					Sold (part)	11/29/23	K	C	
77. - Strategic Adviser Fidelity Core Income	E	Dividend	O	T	Buy (add'l)	01/10/23	J		
78.					Sold (part)	01/31/23	K	A	
79.					Buy (add'l)	02/09/23	K		
80.					Sold (part)	04/05/23	K	A	
81.					Buy (add'l)	05/23/23	J		
82.					Buy (add'l)	06/26/23	J		
83.					Sold (part)	08/14/23	J	A	
84.					Sold (part)	09/29/23	J	A	
85.					Buy (add'l)	11/16/23	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; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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86.					Sold (part)	11/29/23	K	A	
87. -Fidelity Sai Short Term Bond Fund	B	Dividend	L	T	Sold (part)	01/31/23	J	A	
88.					Buy (add'l)	02/09/23	J		
89.					Buy (add'l)	04/05/23	J		
90.					Sold (part)	09/29/23	J	A	
91.					Buy (add'l)	11/16/23	J		
92.					Sold (part)	11/29/23	J	A	
93. -Fidelity Sai Low Duration Income Fund	C	Dividend	L	T	Sold (part)	01/31/23	J	A	
94.					Buy (add'l)	02/09/23	J		
95.					Buy (add'l)	04/05/23	J		
96.					Sold (part)	09/29/23	J	A	
97.					Sold (part)	11/29/23	J	A	
98. -Fidelity SAI High Income Fund	A	Dividend	K	T	Sold (part)	02/09/23	J	A	
99. -Fidelity SAI Inflattion Focused FD	A	Dividend	J	T					
100. -Fidelity SAI Long Term Treasuary Bond Fund	A	Dividend	J	T	Buy	02/29/23	J		
101. Esplanade Capital Ptnrs I LLC (See note section VIII)	A	Int./Div.	N	U					
102. PAS BROKERAGE ACCOUNT(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
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103. - Fidelity Municipal Income	A	Dividend	K	T					
104. -DWS Strategic High Yld Tax	A	Dividend	J	T					
105. -Fidelity Advisor Int'l Discovery CL I	A	Dividend	J	T					
106. -Champlain Small Co. Fund Adv CL Conf	A	Dividend	J	T					
107. -Artisan Intl Value Fund Inv CL	A	Dividend	J	T					
108. -Baron Growth	A	Dividend	J	T					
109. -JPMorgan Mid-Cap Value Fn Select CL	A	Dividend	J	T					
110. AHotchkins & Wiley Mid Cap Value CL A	A	Dividend	J	T					
111. -MFS International Intrinsic Value CL A	B	Dividend	J	T					
112. -MFS Research Int'l Cl A	A	Dividend	K	T					
113. -Primecap Odyssey Growth	A	Dividend	J	T					
114. -SPDR S&P 500 ETF	A	Dividend	K	T					
115. -IShares Russell 1000 Value ETF	A	Dividend	K	T					
116. -IShares Russell 1000 Growth ETF	A	Dividend	L	T					
117. -Fidelity Emerging Markets	A	Dividend	J	T					
118. -Acadian emerging Markets Port Instl	A	Dividend	J	T					
119. -Ishares Russell 1000 Index Fund	A	Dividend	L	T	Sold (part)	02/08/23	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
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
Lynch, Sandra L.	10/22/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
120. -Vanguard Index Fds Vanguard Value	A	Dividend	J	T	Sold (part)	06/22/23	J	D	
121. -T Rowe Price EMERG Markets Stock Fund I	A	Dividend	J	T					
122. -T Rowe Price International STK I	A	Dividend	J	T					
123. -Fidelity Government Cash Reserves Fund	A	Interest	K	T					
124. -Strategic Adv Tax Sensitive Short Dura	B	Dividend	L	T	Buy (add'l)	01/06/23	J		
125.					Buy (add'l)	02/07/23	J		
126.					Sold (part)	03/20/23	J	A	
127.					Buy (add'l)	05/05/23	J		
128.					Buy (add'l)	06/21/23	J		
129.					Sold (part)	08/18/23	J	A	
130.					Buy (add'l)	10/04/23	J		
131.					Sold (part)	11/06/23	J	A	
132. -Fidelity Advisor Intl Growth Cl Z	A	Dividend	J	T					
133. -Ishares Tr US Treas Bd EEF	B	Dividend			Sold (part)	01/09/23	J	A	
134.					Buy (add'l)	02/08/23	J		
135.					Buy (add'l)	03/21/23	J		
136.					Sold (part)	06/22/23	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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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)	
137.					Sold (part)	08/21/23	J	A	
138.					Sold	10/05/23	K	A	
139. -Dodge & Cox Internatl Stock Fund	A	Dividend	J	T					
140. -Goldman Sachs Emerg Mrkts Eq Instl Cl	A	Dividend	J	T					
141. -Hotchkis & Wiley Large Cap Value Cl A	B	Dividend	J	T					
142. -Ishares Russell 2000 ETF	A	Dividend	J	T					
143. -Ishares Tr Eafe Sml Cp ETF	A	Dividend	J	T	Sold (part)	10/05/23	J	A	
144. -Ishares Tr Eafe Value ETF	A	Dividend	J	T					
145. -Jpmorgan US Equity Fund Class	A	Dividend	J	T					
146. -DFA Emerging MRKTS CORE EQUPORTF	A	Dividend	J	T					
147. -T. Rowe Price Equity Income CL I	A	Dividend	J	T					
148. -SAI Municipal Bond Fund	D	Dividend	M	T	Sold (part)	01/06/23	L	A	
149.					Buy (add'l)	02/07/23	L		
150.					Buy (add'l)	05/05/23	J		
151.					Buy (add'l)	06/21/23	J		
152.					Buy (add'l)	08/18/23	J		
153.					Sold (part)	10/04/23	L	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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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)	
154.					Buy (add'l)	11/06/23	L		
155. -William Blair INT'L Growth Fund CL N	A	Dividend	J	T					
156. -Hartford Growth Opp Fund CL A		None	J	T					
157. -Hartford Schrooders EM mkts Eq SDR	A	Dividend			Buy (add'l)	01/06/23	J		
158.					Sold (part)	02/07/23	J	A	
159.					Buy (add'l)	03/20/23	J		
160.					Sold (part)	05/05/23	J	A	
161.					Merged (with line 170)	06/16/23	J		
162. -Pear Tree Polaris FRGN Value Fund	A	Dividend	J	T					
163. -Vanguard Mass Tax Exempt Fund	C	Dividend	L	T	Buy (add'l)	10/04/23	J		
164.					Sold (part)	11/06/23	J	A	
165. -Ishares National Muni Bond ETF	A	Dividend			Buy (add'l)	01/09/23	L		
166.					Sold (part)	02/28/23	K	A	
167.					Sold (part)	03/21/23	J	A	
168.					Sold (part)	08/21/23	J	A	
169.					Sold	10/05/23	J	A	
170. -Hartford Schroders EM Mkts Eq Fund Class A	A	Dividend	J	T	Buy (add'l)	08/18/23	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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171.					Buy (add'l)	10/04/23	J		
172.					Sold (part)	11/06/23	J	A	
173. -Ishare TR MSCI EAFE MIN Vol Factor ETF	A	Dividend	J	T	Buy	10/05/23	J		
174.					Sold (part)	11/07/23	J	A	
175. -Ishare TR 3 7 YR Treas Bond ETF	A	Dividend	J	T	Buy	03/21/23	J		
176.					Buy (add'l)	06/22/23	J		
177.					Buy (add'l)	08/21/23	J		
178.					Sold (part)	10/05/23	J	A	
179.					Buy (add'l)	11/07/23	J		
180. -Vanguard Scott Sdale FDS Inter Term Treas	A	Dividend	K	T	Buy	10/05/23	K		
181. -Morgan Stanley Intl Advantage Fund	A	Dividend			Buy	01/06/23	J		
182.					Sold	02/07/23	J	A	
183. -Ishares Core S&P Mid-Cap ETF	A	Dividend			Buy	01/09/23	J		
184.					Sold	02/08/23	J	A	
185. -DWS Managed Muni Bond FD S	A	Dividend			Buy	10/04/23	L		
186.					Sold	11/06/23	L	A	
187. -Harvor Intl Inst CL Fund	A	Dividend			Buy	03/20/23	J		

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188.					Sold	06/21/23	J	A	
189. SI INVEST ACCOUNT (IRA) (H)									
190. -Schwab US Treas Money Fund	B	Interest	K	T					
191. -American Express	B	Dividend	L	T					
192. -Apple Inc Com	B	Dividend	M	T					
193. -Caterpillar Inc Del	B	Dividend	L	T					
194. -Emerson Electric	B	Dividend	K	T					
195. -Exxon Mobil Corp	C	Dividend	L	T					
196. -Goldman Sachs Group Com	D	Dividend	M	T					
197. -J P Morgan Chase & Co	C	Dividend	M	T					
198. -Mondelez Intl Inc Cl A	C	Dividend	L	T					
199. -Oracle Corp	C	Dividend	M	T					
200. -Salesforce Com Inc Com		None	L	T					
201. -Schlumberger	A	Dividend	K	T					
202. -Thermo Fisher Scientific Inc	A	Dividend	L	T					
203. -Verizon Communications Com	D	Dividend	K	T					
204. -Alphabet Inc. CL C		None	M	T					

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205. -Coca-Cola Company	C	Dividend	K	T					
206. -Diageo PL C Spon ADR new	B	Dividend	K	T					
207. -Johnson & Johnson Com	C	Dividend	L	T					
208. -Pfizer Inc	C	Dividend	K	T					
209. -Broadcom Ltd Shs	C	Dividend	M	T					
210. -Wal Mart Stores	B	Dividend	L	T					
211. -General Motors Corp Com	A	Dividend	J	T					
212. -US Treasury Bill	E	Interest	O	T	Sold (part)	01/26/23	N	D	
213.					Buy (add'l)	05/04/23	O		
214.					Sold (part)	08/03/23	O	D	
215.					Buy (add'l)	10/19/23	O		
216. JP Morgan Chase bank (formerly First Republic Bank)	A	Interest			Closed	04/30/23	L		
217. Citizens Bank	B	Interest			Closed	11/03/23	J		
218. Traditional IRA Sandra Lynch - Co-Custodian (H)									
219. -Fidelity Gov Money Market	C	Dividend	L	T	Buy	01/31/23	L		
220. Charles Schwab(H)									
221. -Cash	A	Interest	J	T					

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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 181 Charles Schwab account is added in 2023. Before 2023, this account hold de minimis amount of cash.

Name of Person Reporting	Date of Report
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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. § 13141 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. § 13106)

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