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
Montecalvo, Lara E.	First Circuit Court of Appeals	05/14/2023
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, First Circuit Court of Appeals - Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022

7. Chambers or Office Address

U.S. Court of Appeals for the First Circuit
316 Federal Building and Courthouse
One Exchange Terrace
Providence, R.I. 02903

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.	Co-trustee	[redacted] trust - 1998
2.	Board Member	Criminal Justice Policy Board State of Rhode Island
3.	Member	State of R.I. Gen. Assembly, Special Legis. Commiss. to Study Justice Reinvestment Proposals and Provide Rec. for Reduc. Incar. of Women
4.	Fellow	Rhode Island Bar Association Foundation
5.	Member	R.I. Bar Assoc. Supreme Court Bench Bar Committee
6.	Member	R.I. Association of Criminal Defense Lawyers
7.	Member	R.I. Women's Bar Association
8.	Member	Nayatt Elementary School Parent-Teacher Organization

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.	2009	State of Rhode Island: state employee pension
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	State of Rhode Island, full-time salary, to 9/21/22	$96,000.00
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 attorney
2.	2022	CVM Properties, LLC: rental income
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
Montecalvo, Lara E.	05/14/2023

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.	(H) SEP									
2.	Fidelity Government Money Market Fund	A	Dividend	K	T					
3.	Fidelity Multi Asset Index Fund	E	Dividend	M	T					
4.	Fidelity 500 Index Fund	A	Dividend	M	T					
5.	Fidelity Zero Total Market Index Fund	B	Dividend	L	T					
6.	(H) Individual - TOD#1									
7.	Fidelity Government Money Market Fund	A	Dividend	J	T					
8.	Fidelity Money Market Premium Class Fund	A	Dividend	M	T					
9.	Quad-Graphics, Inc. common stock		None	M	T					
10.	(H) Individual - TOD #2									
11.	Fidelity Money Market Premium Class Fund	A	Dividend	M	T					
12.	Janus Henderson Enterprise T Fund	C	Dividend	K	T					
13.	Janus Henderson Research T Fund	C	Dividend	K	T					
14.	Allspring Oppotunity Capital FDA Fund	D	Dividend	M	T					
15.	(H) IRA									
16.	Fidelity Government Cash Reserves Fund	A	Dividend	J	T					
17.	Fidelity Puritan Fund	B	Dividend	L	T					

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

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Montecalvo, Lara E.	05/14/2023

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

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Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
18. (H) 529									
19. New Hampshire 2033 Fidelity Index Fund		None	L	T					
20. (H) Bank Accounts #1									
21. Citizens Bank Personal Money Market Account	A	Interest	K	T					
22. Citizens Bank Checking	A	Interest	M	T					
23. Citizens Bank CD	A	Interest	L	T					
24. (H) Bank Accounts #2									
25. Citizens Bank Business Checking for LLC		None	L	T					
26. Citizens Bank Business Operating Account		None	L	T					
27. Citizens Bank Personal Checking	A	Interest	J	T					
28. Citizens Bank Personal Savings	A	Interest	M	T					
29. (H) State Retirement Accounts, TIAA									
30. State of RI defined contrib. retire. plan Vang. Tgt. Rtmt. 2040 Tr Pls		None	L	T					
31. State of RI defined contrib. retire. plan Vang. Tgt. Rtmt. 2035 Tr Pls		None	J	T					
32. (H) Rental Income									
33. CVM Properties, LLC, Providence, R.I.	E	Rent	K	W					
34.									

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35.									
36.									

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

Name of Person Reporting	Date of Report
Montecalvo, Lara E.	05/14/2023

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/ Lara E. Montecalvo

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