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
Montecalvo, Lara E.	First Circuit Court of Appeals	08/13/2025
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	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
U. S. Court of Appeals for the First Circuit 316 Federal Building and Courthoue One Exchange Terrace Providence, RI 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.	Fellow	Rhode Island Bar Association Foundation
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.	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.			
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 attorney
2.	2023	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.	08/13/2025

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.	SEP (H)									
2.	Fidelity Government Money Market Fund (SPAXX)	A	Dividend	J	T					
3.	Fidelity Multi Asset Index Fund	D	Dividend	M	T					
4.	Fidelity 500 Index Fund (FXAIX)	B	Dividend	M	T					
5.	Fidelity Zero Total Market Index Fund (FZROX)	A	Dividend	L	T					
6.	Wells Fargo Bank Natl Assoc CD		None	L	T	Buy	05/09/23	L		
7.	Individual - TOD#1 (H)									
8.	Fidelity Government Money Market Fund (SPAXX)	D	Dividend	J	T					
9.	Fidelity Money Market Premium Class Fund (FZDXX)	D	Dividend	J	T	Buy (add'l)	09/26/23	M		transfer from TOD#2
10.						Redeemed (part)	09/27/23	N		
11.	Fidelity 500 Index Fund (FXAIX)	B	Dividend	N	T					
12.	Fidelity Zero Total Market Index Fund (FZROX)	C	Dividend	N	T	Buy (add'l)	09/26/23	N		
13.	Janus Henderson Enterprise T Fund (JAENX)	B	Dividend	K	T	Buy	09/26/23	K		transfer from TOD#2
14.	Janus Henderson Research T Fund (JAMRX)	A	Dividend	K	T	Buy	09/26/23	K		transfer from TOD#2
15.	Allspring Opportunity Capital FDA Fund (SOPVX)	C	Dividend	M	T	Buy	09/26/23	M		transfer from TOD#2
16.	Quad-Graphics, Inc. (QUAD)		None	M	T					
17.	US Treasury Ser BG-2024 Fixed Coupon 8/31/24 Cusip 91282CFG1	B	Interest	K	T	Buy	09/26/23	K		

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. US Treasury Notes FIxed Coupon 8/15/25 Cusip 912828K74	A	Interest	K	T	Buy	09/26/23	K		
19. US Treasury Ser AR-2026 Fixed Coupon 8/15/26 Cusip 91282CHU8	B	Interest	K	T	Buy	09/26/23	K		
20. US Treasury AB-2027 Fixed Coupon 7/31/27 Cusip 91282CFB2	B	Interest	K	T	Buy	09/26/23	K		
21. US Trasury Bonds Fixed Coupon 8/15/28 Cusip 912810FE3	B	Interest	K	T	Buy	09/26/23	K		
22. Individual - TOD#2 (H)					Closed	09/27/23	J		
23. Fidelity Money Market Premium Class Fund (FZDXX)	D	Dividend			Distributed	09/26/23	M		transfer to TOD#1
24. Janus Henderson Enterprise T Fund (JAENX)		None			Distributed	09/26/23	K		transfer to TOD#1
25. Janus Henderson Research T Fund (JAMRX)		None			Distributed	09/26/23	K		transfer to TOD#1
26. Allspring Opportunity Capital FDA Fund (SOPVX)		None			Distributed	09/26/23	M		transfer to TOD#1
27. IRA #1 (H)									
28. FIdelity Government Cash Reserves Fund (FDRXX)	A	Dividend	K	T					
29. Fidelity Puritan Fund (FPURX)	C	Dividend	L	T					
30. 529 (H)									
31. New Hampshire 2033 Fidelity Index Fund	B	Dividend	L	T					
32. Bank Accounts (H)									
33. Citizens Bank- Money Market - [redacted]	A	Interest	K	T					
34. Citizens Bank- Checking - [redacted]	A	Interest	M	T					

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35. Citizens Bank CD - [redacted]	A	Interest	L	T					
36. Citizens Bank - LLC Account		None	L	T					
37. Citizens Bank - Business Account - [redacted]		None	L	T					
38. Citizens Bank - Checking 2 accounts - [redacted]	A	Interest	J	T					
39. Citizens Bank - Savings - [redacted]	A	Interest	M	T					
40. State of RI Defined Contribtuion Plan TIAA-[redacted] (H)									
41. Vanguard Target Retirement 2040 TR Pls		None	L	T					
42. State of RI Defined Contribtuion Plan TIAA-[redacted] (H)									
43. Vanguard Target Retirement 2040 TR Pls		None	L	T					
44. CVM Properties LLC, Providence RI	E	Rent	M	W					
45.									

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

Name of Person Reporting	Date of Report
Montecalvo, Lara E.	08/13/2025

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
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Washington, D.C. 20544