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
Newman, Jon O.	U.S. Court of Appeals for the Second Circuit	09/18/2023
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 senior status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
40 Foley Square New York, NY 10007		

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.	Corporator	Hartford Hospital
2.	Corporator	Institute of Living
3.	Elector	Hartford Atheneum
4.	Life Regent	University of Hartford
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.	6/1/22	book royalty from University of NorthCarolina Press	$60.00
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.	6/1/22	book rayalty from She Writes Press. My wife is a self-employed writer.
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.	Yale Law School	three nights loding and meals while attend Global Constitutional Seminar Sept. 14-17	$900.00
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
Newman, Jon O.	09/18/2023

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. c Bank accounts and cash (H):									
2. Bank of America Sarasota FL	A	Interest	L	T					
3. Raymond James Bank Deposit Program	B	Interest	N	T					
4. Brokerage Account No. 1 (H)									
5. CDs (H):									
6. Stocks (H):									
7. Air Products	C	Dividend	N	T					
8. Cisco	B	Dividend	M	T					
9. Cummins	C	Dividend	N	T					
10. Johnson and Johnson	C	Dividend	M	T					
11. Merck	D	Dividend	N	T					
12. Microsoft	B	Dividend	O	T					
13. Minnesota Miniing and Manufacturing	C	Dividend	M	T					
14. Total Fina	D	Dividend	M	T					
15. Mutual funds and exchange-traded funds (H):									
16. Invesco Oppenheimer Roch AMT Free Mu C Fund	B	Dividend	L	T					
17. Schwab 1000 Fund	B	Dividend	M	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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18. Bonds (H):									
19. Bound Brook NJ '21 4.0		None			Redeemed	02/01/22	L		
20. Cape Coral FL '24 5.0	B	Interest	K	T					
21. Capital Region wtr PA '24 5.0	C	Interest	K	T					
22. Colony TX tax rev'27 .5.0	A	Interest	L	T	Buy	08/12/22	L		
23. Colorado Springs CO Utils '22 5.0	B	Interest			Redeemed	11/15/22	K		
24. Conn. ST GO '23 5.0	C	Interest	L	T					
25. Des Moines IA Stormwater '23 5.0	B	Interest	K	T					
26. Duncanville TX '23 5.0	B	Interest	L	T					
27. Elkhorn Minn '23 2.0	A	Interest	L	T					
28. Florida St Brd Ed '23 5.0	B	Interest	K	T					
29. Florida StTrans '27 5.0	A	Interest	K	T	Buy	08/12/22	K		
30. Florida Environ. Rev, '23 5.0	B	Interest	L	T					
31. Fl St. Environment.'24 5.0	B	Interest	L	T					
32. Frisco TX '27 5.0	B	Interest	L	T	Buy	08/10/22	L		
33. Gainesville, GA wtr '23 5.0	A	Interest	K	T					
34. Georgia ST GO '23 5.0	B	Interest	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

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35. Hamilton Cnty TN '23 5.0	B	Interest	K	T					
36. Harris Cnty TX '22 30	B	Interest			Redeemed	02/01/22	L		
37. Hartford CT '23 5.0	B	Interest	L	T					
38. Holdingford Minn School '23 5.0	B	Interest	L	T					
39. Key West FL Elec. '23 5.0	B	Interest	K	T					
40. Lancaster PA GO '22 4.0	A	Interest			Redeemed	11/01/22	J		
41. Louisiana GO A '23 5.0	B	Interest	L	T					
42. Louisiana GO A '26 5.0	C	Interest	L	T	Buy	02/03/22	L		
43. Lubbock TX elec rev '27 5.0		None	L	T	Buy	09/07/22	L		
44. Maryland '23 5.0	B	Interest	L	T					
45. Maryland '22 5.0	B	Interest			Redeemed	08/01/22	K		
46. Maryland RFDG '22 5.0	B	Interest			Redeemed	08/01/22	K		
47. Massachusetts rdfg ser A '23 5.0	B	Interest	L	T					
48. New Mexico St GO '24 5.0	B	Interest	K	T					
49. North Car. RFDG '23 5.0	B	Interest	K	T					
50. Ohio St. job ready '22 4.0	B	Interest			Redeemed	11/01/22	K		
51. Ohio St RFDG High Ed '22 5.0	B	Interest			Redeemed	01/01/22	K		

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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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52. Oklahoma City '23 5.0	B	Interest	K	T					
53. Oregon St Housing 2.65 '24	A	Interest	L	T	Redeemed (part)	06/01/22	J		
54. Rhode Island Comm Corp '22 5.0	B	Interest			Matured	06/15/22	K		
55. Penn. St. GO '24 5.0	C	Interest	L	T					
56. South Amboy NJ '22 4.0	A	Interest			Redeemed	05/02/22	K		
57. Springfield IL Elec Rev '24 5.0	B	Interest	K	T					
58. Univ. CT '22 5.0		None			Redeemed	01/16/22	L		
59. Upper Trinity Wtr TX '22 5.0	A	Interest			Redeemed	08/01/22	J		
60. Washuington Cnty 03/01/23 5.0 (see note, Part VIII)	B	Interest	K	T					
61. Washington St var purp rev '02/01/27 5.0	A	Interest	L	T	Buy	08/12/22	L		
62. West Rankin, MS '24 5.0	B	Interest	K	T					
63. West Wildwood, NJ '21 3.0		None			Redeemed	02/01/22	L		
64. Wisconsin St GO ref '27 5.0	A	Interest	L	T	Buy	08/12/22	L		
65. Brokerage Account No. 2. (H):									
66. Raymond James Bank Deposit Program	A	Interest	M	T					
67. Stocks (H):									
68. Abbvie	C	Dividend	L	T					

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69. Aflac	A	Dividend	J	T					
70. Amazon		None	M	T					
71. American Electric Power	B	Dividend	K	T					
72. Amgen	B	Dividend	K	T					
73. Apple	B	Dividend	M	T					
74. Berkshire Hathaway		None	L	T					
75. Bristol Myers Squibb	B	Dividend	K	T					
76. Broadcom	C	Dividend	M	T					
77. Chevron	C	Dividend	L	T					
78. Cigna new	A	Dividend	K	T					
79. Digital Realty Trust	A	Dividend	L	T					
80. Dow Inc.	C	Dividend	L	T					
81. Home Depot	B	Dividend	L	T					
82. IBM	B	Dividend	K	T					
83. Intel	B	Dividend	K	T					
84. Iron Mountain, Inc.	D	Dividend	M	T					
85. Johnson & Johnson	B	Dividend	L	T					

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86. JP Morgan Chase	C	Dividend	L	T					
87. Kimberly-Clark	B	Dividend	L	T					
88. Lockheed Martin	A	Dividend	K	T	Buy	05/16/22	K		
89. Medical PPTYS Trust REIT	B	Dividend	L	T	Buy	08/25/22	L		
90. Merck	A	Dividend	K	T					
91. National Retail Properties Inc.	C	Dividend	L	T	Buy (add'l)	04/08/22	J		
92. Nextera Energy	B	Dividend	L	T					
93. Pfizer	B	Dividend	L	T					
94. Phillips 66	B	Dividend	K	T					
95. Procter & Gamble	B	Dividend	L	T					
96. Qualcomm	A	Dividend	L	T	Buy (add'l)	04/08/22	J		
97. Realty Income Corp..	C	Distribution	L	T					
98. Southern Company		None	K	T					
99. Verizon	B	Dividend			Buy (add'l)	04/08/22	J		
100.					Sold	08/25/22	L		
101. Waste Mgmt	B	Dividend	L	T					
102. WP Carey Inc Reit	C	Dividend	K	T	Buy (add'l)	04/08/22	J		

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103.					Buy (add'l)	05/16/22	K		
104. Mutual Funds (H)									
105. American Tax-Exempt Bond Fund	C	Dividend	M	T					
106. Goldman Sachs Dynamic Mun. Inc. Fund	C	Dividend	M	T					
107. Exchange Traded Funds (H)									
108. SPDR S&P dividend ETF Fund	C	Dividend	M	T					
109. SPDR Financial Select Spector Fund	B	Dividend			Sold	05/16/22	L		
110. Vanguard Intermediate Term ETF Bond Fund	B	Dividend			Sold	08/26/22	L		
111. Vanguard Short Term ETF bond Fund	A	Dividend			Sold	08/26/22	J		
112. Merrill Edge Account (H):									
113. Merrill Lynch direct deposit program	A	Int./Div.	J	T					
114. ETF and Mutual Funds (H)									
115. AB Large Capital Growth Fund	A	Dividend	K	T					
116. Invesco QQQ Trust Units Ser. 1 Fund	A	Dividend	L	T					
117. Ishares core S&P small cap etf fund	A	Dividend	K	T					
118. Ishares S&P small cap 600 growth fund	A	Dividend	K	T					
119. Janus Henderson Enterprise fund	B	Dividend	L	T	Buy	01/05/22	K		

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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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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 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 Mid-Cap Value Index Fund	A	Dividend	K	T					
121. Bonds (H)									
122. Manatee County Recreational District 3.5 '50	A	Interest	K	T					
123. N.Y. St. Dorm. '21 5.0		None			Matured	01/03/22	L		
124. Stocks (H)									
125. Apple Inc.	A	Dividend	M	T					
126. Other (H):									
127. Thames & Hudson Royalty Contract	A	Royalty	J	W					
128. AIG fixed income Annuity (IRA)	B	Interest	K	T					
129. AIG fixed income Annuity (IRA)	A	Interest	J	T					
130. charitable gift annuity (fixed income) (see note Part VIII)	D	Dividend	M	W	Buy	05/01/22	M		
131. - Trust No. 1 (H):(see note part VIII)									
132. - Brokerage Account No. 1 (H):									
133. - Raymond James Bank Deposit Pprogram	C	Interest	N	T					
134. - CDs (H)									
135. - Stocks (H):									
136. - 3M	C	Dividend	M	T					

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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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137. - Adobe Systems		None	N	T					
138. - Agilent	A	Dividend	M	T					
139. - American Express	C	Dividend	M	T					
140. - Automatic Data Processing	D	Dividend	N	T					
141. - Baxter Int'l	D	Dividend	N	T					
142. - Becton Dickinson	C	Dividend	N	T					
143. - CDK Global	A	Dividend	K	T					
144. - Cigna	D	Dividend	N	T					
145. - Dominion Resources	D	Dividend	M	T					
146. - Edwards Life Resources		None	O	T					
147. - Embecta	A	Dividend	J	T	Spinoff (from line 142)	04/01/22	J		
148. - Emerson Electric	B	Dividend	M	T					
149. - General Mills	D	Dividend	M	T					
150. - Home Depot	E	Dividend	P1	T					
151. - Intel	D	Dividend	M	T					
152. - IBM	A	Dividend	K	T					
153. - Keysight Technologies		None	L	T					

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154. - McDonalds	D	Dividend	N	T					
155. - Microsoft	D	Dividend	P1	T					
156. - Procter & Gamble	C	Dividend	M	T					
157. - RPM Int'l	D	Dividend	O	T					
158. - Travelers	B	Dividend	L	T					
159. - T Rowe Price	C	Dividend	M	T					
160. - Weyerhauser	C	Dividend	K	T					
161. - Bonds (H):									
162. - Auburndale FL Rev '23 3.0 (see note part VIII)	A	Interest	K	T					
163. - Baltimore MD '22 5.0	B	Interest			Redeemed	07/01/22	K		
164. - Beaumont TX '25 5.0	A	Interest	K	T	Buy	08/12/22	K		
165. - Burlington VT '22 5.0	B	Interest			Matured	12/01/22	K		
166. Columbus OH '23 5.0	B	Interest	L	T					
167. - Delton Kellogg MY Sch '22 4.0	B	Interest			Redeemed	05/02/22	L		
168. - Denton TX '22 5.0	A	Interest			Redeemed	07/15/22	L		
169. - Des Moines IA G.O. '23 5.0	B	Interest	K	T					
170. - Florida ST Trans '25 5.0	A	Interest	K	T	Buy	08/12/22	K		

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171. - Louisiana St Energy & Pwr '23 5.0	C	Interest	L	T					
172. - Mississippi ST GO '27 5.0	A	Interest	K	T	Buy	08/12/22	K		
173. - Orange Cnty FL '24 5.0	C	Interest	L	T					
174. - Oyster Bay NY '23 3.0	B	Interest	L	T					
175. - Oyster Bay, NY 4.0 '26	B	Interest	L	T	Buy	02/03/22	L		
176. - Philadelphia PA Wtr '23 3.0	A	Interest	K	T					
177. - Philadelphia PA GO '28 5.0	A	Interest	L	T	Buy	08/12/22	L		
178. - Port Lucie DFL Util '27 5.25	A	Interest	K	T	Buy	08/12/22	K		
179. - Sauk Centre Minn Sch '24 3.0	A	Interest	K	T					
180. - Vancouver Wash. '22 5.0	B	Interest			Redeemed	01/03/22	K		
181. - West Orange NY '22 2.0	A	Interest	L	T					
182. - West VA RFDG '23 5.0	A	Interest	K	T					
183. - Williamson Cnty TX '22 4.5	A	Interest			Redeemed	08/12/22	J		
184. - Brokerage Account No. 2 (H):									
185. - Raymond James Bank Deposit Program	A	Interest	L	T					
186. - Stocks (H):									
187. - Abbott Labs	A	Dividend	J	T					

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188. - Abbvie	B	Dividend	K	T					
189. - Alphabet Inc.		None	J	T					
190. - Amazon		None	K	T					
191. - American Electric Power	A	Dividend	J	T					
192. - American Express	A	Dividend	K	T					
193. - Apple	A	Dividend	M	T					
194. - Blackrock	A	Dividend	J	T					
195. - Bristol Myers Squibb	B	Dividend	K	T					
196. - Chevron	B	Dividend	K	T					
197. - Coca-cola	A	Dividend	K	T					
198. - Comcast	A	Dividend	J	T					
199. - Estee Lauder	A	Dividend	J	T					
200. - Intuitive Surgical		None	J	T					
201. - Iron Mountain	B	Dividend	K	T					
202. - Johnson & Johnson	A	Dividend	K	T					
203. - JP Morgan Chase	B	Dividend	K	T					
204. - Kimberly Clark	A	Dividend	K	T					

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205. - Mastercard	A	Dividend	J	T					
206. - McDonalds	A	Dividend	K	T					
207. - Medical PPTYS Trust REIT	A	Dividend	K	T	Buy	08/24/22	K		
208. - Meta (see note Part VIII)		None	K	T					
209. - Microsoft	A	Dividend	L	T					
210. - Nestle	A	Dividend	J	T					
211. - Nextera Energy	A	Dividend	K	T					
212. - Nike	A	Dividend	J	T					
213. - Novo-Nordisk	A	Dividend	J	T					
214. - Pepsico	A	Dividend	K	T					
215. -Pfizer	A	Dividend	K	T					
216. - Procter & Gamble	A	Dividend	K	T					
217. - Roche Holding	A	Dividend	J	T					
218. - Texas Instruments	A	Dividend	J	T					
219. - Union Pacific	A	Dividend	J	T					
220. - United Health	A	Dividend	J	T					
221. - Verizon	A	Dividend			Sold	08/24/22	K		

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222. - Visa	A	Dividend	K	T					
223. - Waste Management	A	Dividend	K	T					
224. - Exchange Traded and Closed End Funds (H):									
225. - SPDR Nuveen Barclays Mun. Fund	A	Dividend	K	T					
226. - SPDR S&P Div ETF Fund	B	Dividend	L	T					
227. - Vanguard Intermediate ETF Term Bd Fund	A	Dividend	K	T					
228. - Vanguard short term ETF Bd Fund	A	Dividend			Sold	09/26/22	K		
229. -Vanguard TTL World Stk Index Fund	B	Dividend	M	T					
230. - Mutual Funds (H):									
231. - American Funds Tax-Exempt Bond Fund	B	Dividend	L	T					
232. - Cohen & Steers Realty Fund	B	Dividend	K	T					
233. - Franklin Conv. Sec. Adv. Fund	C	Dividend	L	T					
234. - Goldman Sachs Dynamic Mun. Inc. Fund	B	Dividend	L	T					
235. - Nuveen limited term muni bond I Fund	B	Dividend	L	T					
236. - Bonds (H):									
237. - U.S. Treasury 09/07/23		None	L	T	Buy	09/22/22	L		
238. - Trust No. 2: (H) (see note Part VIII)									

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239. - Brokerage Account No. 1 (H):									
240. - Raymond James Bank Deposit Program	B	Interest	M	T					
241. - CDs (H)									
242. - Stocks (H):									
243. - 3M Co.	D	Dividend	M	T					
244. - Air Products	C	Dividend	M	T					
245. - Apple	C	Dividend	N	T					
246. - Danaher	A	Dividend	M	T					
247. - Fortive	A	Dividend	K	T					
248. - Johnson & Johnson	C	Dividend	M	T					
249. - Vontier	A	Dividend	J	T					
250. - Wells Fargo	A	Dividend	J	T					
251. - Bonds (H):									
252. - Florida Dpt Enviromental Protection Everglades '23 5.0 '23 5.0	B	Interest	L	T					
253. - Florida Dpt Environmental Protection RFDG '23 5.0	B	Interest	L	T					
254. - Florida St Tpk '27 5.0	A	Interest	K	T	Buy	08/12/22	K		
255. - Maryland St G.O. '23 5.0	B	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

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Name of Person Reporting	Date of Report
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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				
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256. - New York GO '27 5.0	A	Interest	L	T	Buy	08/12/22	L		
257. - Ohio St Wtr Pollution '23 5.0	A	Interest	J	T					
258. - Okla St Pwr '27 5.0	A	Int./Div.	L	T	Buy	08/12/22	L		
259. - Pennsylvania RFDG 1st Ser. '23 5.0	C	Interest	L	T					
260. - Port Lucie FL '27 5.25	B	Interest	M	T	Buy	08/12/22	M		
261. - Brokerage Account No. 2 (H):									
262. - Raymond James Bank Deposit Program	A	Interest	M	T					
263. - Stocks (H):									
264. - Amazon		None	L	T					
265. - American Electric Power	B	Dividend	K	T					
266. - American Express	A	Dividend	K	T					
267. - Apple	B	Dividend	M	T					
268. - Chevron	C	Dividend	L	T					
269. - Conoco Phllips	C	Dividend	L	T					
270. - Constellation Energy	A	Dividend	J	T	Spinoff (from line 273)	02/02/22	J		
271. - Digital Realty Trust Inc	B	Dividend	L	T					
272. - Ebay	A	Dividend	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

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273. - Exelon	A	Dividend	J	T					
274. - Iron Mountain, Inc.	C	Dividend	L	T					
275. - Johnson & Johnson	B	Dividend	L	T					
276. - JP Morgan Chase	B	Dividend	L	T					
277. - Lowes	A	Dividend	K	T					
278. - Medtronic	A	Dividend	K	T					
279. - Meta (see note Part (VIII)		None	K	T					
280. - Microsoft	A	Dividend	L	T					
281. - National Retail Properties	C	Dividend	L	T	Buy (add'l)	05/16/22	J		
282.					Buy (add'l)	01/25/22	J		
283. - Nextera Energy	C	Dividend	M	T					
284. - Pepsico	B	Dividend	K	T					
285. - Pfizer	B	Dividend	K	T					
286. - Phillips 66	B	Dividend	K	T	Buy (add'l)	05/16/22	K		
287. - PNC Financial	B	Dividend	K	T					
288. - PPG	C	Dividend	K	T					
289. - Procter & Gamble	C	Dividend	M	T					

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290. - Qualcomm	B	Dividend	L	T	Buy (add'l)	05/16/22	K		
291. - Realty Income Corp	C	Dividend	L	T					
292. - Southern Company	B	Dividend	K	T					
293. - Target	A	Dividend	K	T					
294. - Travelers	A	Dividend	K	T					
295. - Truist Finl Corp.	A	Dividend	K	T					
296. - Verizon	B	Dividend			Sold	01/25/22	K		
297. - Waste Management	A	Dividend	L	T					
298. - WP Carey REIT	A	Dividend	K	T	Buy	01/25/22	K		
299. - Bonds (H):									
300. - Wells Fargo notes 4.48 '24		None	K	T	Buy	09/26/22	K		
301. - Exchange Traded & Closed End Funds:(H)									
302. - IShares MSCI Small Cap Fund	B	Dividend	L	T					
303. - IShares Short Treasury Bond Fund	A	Dividend	K	T					
304. - SPDR S&P div ETF Fund	B	Dividend	L	T					
305. - SPDR Financial Select Sector Fund	A	Dividend			Sold	05/16/22	K		
306. - Vanguard Intermediate Term ETF Bd Fund	B	Dividend	K	T					

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307. - Vanguard short teerm ETF Bd Fund	A	Dividend	K	T					
308. - Xtrackers MSCI EAFE Equity Fund	E	Dividend	M	T					
309. - Mutual Funds (H):									
310. - American tax-exempt bond Fund	B	Dividend	L	T					
311. - Franklin Fed. Intm. Trm. Tx. Fr. Adv. Fund	C	Dividend	M	T					
312. - Goldman Sachs Dynamic Mun. Inc. Fund (see note Part VIII)	B	Dividend	L	T					
313. - Nuveen Ltd. Term Mun. Bond Fund	B	Dividend	L	T					
314. - Trust No. 3: (H) (see note Part VIII)									
315. - Brokerage Account No. 1 (H):									
316. - Raymond James Bank Deposit Program	A	Interest	M	T					
317. - CDs (H):									
318. - bonds: (H):									
319. - Audubon NJ G.O. '23 2.0	A	Interest	L	T					
320. - Austin TX '27 5.0	A	Interest	K	T	Buy	08/12/22	K		
321. - Bucks Cnty PA '22 2.5	A	Interest			Redeemed	12/01/22	K		
322. - CT Ser B G/O '23 2.0	A	Interest	K	T					
323. - Davenport Iowa '27 5.0	A	Interest	K	T	Buy	08/12/22	K		

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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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324. - Del Rio TX '22 2.250	A	Interest			Matured	06/01/22	K		
325. -Mass ST WTR '22 5.0	B	Interest			Redeemed	08/12/22	K		
326. - New York NY Rfdg '22 3.0	A	Interest			Redeemed	08/12/22	K		
327. - Ohio St Wtr '27 5.0	A	Interest	K	T	Buy	08/12/22	K		
328. - Philadelphia PA '28 5.0	A	Interest	M	T	Buy	08/12/22	M		
329. - Venice FL Util '22 2.0	A	Interest			Redeemed	12/01/22	K		
330. - Stocks (H):									
331. - Apple	B	Dividend	N	T					
332. - Automatic Data Processing	B	Dividend	L	T					
333. - Caarrier Global	A	Dividend	K	T					
334. - Danaher	A	Dividend	M	T					
335. - Ecolab	C	Dividend	N	T					
336. - Nike Class B	B	Dividend	M	T					
337. - Otis	A	Dividend	K	T					
338. - Raytheon Technologies	B	Dividend	L	T					
339. - Brokerage Account No. 2 (H):									
340. - Raymond James Bank Deposit Program	A	Interest	M	T					

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341. - Stocks (H):									
342. - Abbvie	B	Dividend	L	T					
343. - Amazon		None	K	T					
344. - Ameerican Electric Power	A	Dividend	J	T					
345. - Anasys		None	J	T					
346. - Apple	A	Dividend	M	T					
347. - AspenTechnology		None	J	T					
348. - Autodesk		None	K	T					
349. - Biogen		None	J	T					
350. - Broadcom	A	Dividend	K	T					
351. - CDW	A	Dividend	J	T					
352. - Chevron	B	Dividend	K	T					
353. - Citrix		None			Sold	10/03/22	J		
354. - Comcast	A	Dividend	K	T					
355. - ConocoPhillips	B	Dividend	K	T					
356. - Cooper Co.	A	Dividend	J	T					
357. - Copart		None	J	T					

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358. - Digital Realty Trust	A	Dividend	K	T					
359. - Docusign		None	J	T					
360. - Dolby	A	Dividend	J	T					
361. - Expeditors Int'l	A	Dividend	J	T					
362. - General Mills	A	Dividend	K	T					
363. - Home Depot	B	Dividend	L	T					
364. - IBM	A	Dividend	K	T					
365. - Ionis Pharmaceuticals		None	J	T					
366. - Iron Mountain, Inc.	B	Dividend	K	T					
367. - JPMorgan Chase	A	Dividend	K	T					
368. - Jack Henry	A	Dividend	J	T					
369. - L3 Harris Technologies	A	Dividend	K	T					
370. - Lockheed Martin	A	Dividend	K	T	Buy (add'l)	05/16/22	J		
371. - Medical PPTYS Trust REIT	A	Dividend	K	T	Buy	08/24/22	K		
372. - Medtronic	A	Dividend	J	T					
373. - Merck	A	Dividend	K	T					
374. - Microoft	A	Dividend	L	T					

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375. - MSCI Inc Com	A	Dividend	K	T					
376. - Nestle	A	Dividend	J	T					
377. - Nextera Energy	A	Dividend	L	T					
378. - Pepsico	A	Dividend	K	T					
379. - Pfizer	A	Dividend	K	T					
380. - Phillips 66	B	Distribution	K	T					
381. - Pool Corp.	A	Dividend	K	T					
382. - Procter & Gamble	A	Dividend	K	T					
383. - Qualcom	A	Dividend	K	T					
384. - Realty Income Corp.	B	Dividend	K	T					
385. - Scott's Miracle-Glo	A	Dividend	J	T					
386. - Seagate Tech.		None	J	T					
387. - Southern Company	A	Dividend	K	T					
388. - Taiwan Semiconductor	A	Dividend	J	T					
389. - TE Connectivity		None	K	T					
390. - Teradyne	A	Dividend	K	T					
391. - Twitter		None			Sold	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; U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
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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. - United Health	A	Dividend	K	T					
393. - Verizon	A	Dividend			Sold	08/24/22	K		
394. - Vertex		None	J	T					
395. - Waste Management	A	Dividend	K	T					
396. - WP Carey Inc Reit	B	Dividend	K	T					
397. - Exchange Traded Closed End Funds (H):									
398. - Ishares Russell 3000 Fund	A	Dividend	L	T					
399. - SPDR S&P Div ETF Fund	B	Dividend	L	T					
400. - Vanguard Intermediate ETF term bond Fund	A	Dividend			Sold	09/26/22	K		
401. - Vanguard short term Corp Bond Fund	A	Dividend			Sold	09/26/22	K		
402. - Mutual funds (H):									
403. - American Tax-Exempt Bd Fund	B	Dividend	J	T					
404. - E V Atlanta Cap Sel Eq Fund		None			Sold	09/22/22	K		
405. - Goldman Sachs Dynamic Mun. Inc. Fund	B	Dividend	M	T					
406. - IRA consisting of Stocks and Corporate Bonds: (H)									
407. - Brokerage Account No. 1 (H):									
408. - Raymond James Bank Deposit Program	A	Interest	J	T					

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
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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	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)	
409. - Brokerage Account No. 2 (H):									
410. - Raymond James Bank Deposit Program	A	Interest	L	T					
411. - Stocks (H):									
412. - Amazon		None	L	T					
413. - American Electric Power	A	Dividend	K	T					
414. - Amgen	A	Dividend	K	T					
415. - Apple	A	Dividend	L	T					
416. - Berkshire Hathaway	A	Dividend	L	T					
417. - Chevron	A	Dividend	K	T					
418. - Digital Realty Trust	A	Dividend	K	T					
419. - General Mills	A	Dividend	K	T					
420. - Home Depot	A	Dividend	K	T					
421. - IBM (see note Part VIII)	A	Dividend	K	T					
422. - Johnson & Johnson	A	Dividend	K	T					
423. - JP Morgan Chase	A	Dividend	K	T					
424. - Lockheed Martin	A	Dividend	K	T	Buy (add'l)	05/16/22	J		
425. - Medical PPTYS Trust REIT	A	Dividend	K	T	Buy	08/24/22	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

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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	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)	
426. - Merck	A	Dividend	K	T					
427. - Microsoft	A	Dividend	K	T					
428. - Nextera Energy	A	Dividend	K	T					
429. - Pepsico	A	Dividend	K	T					
430. - Pfizer	A	Dividend	K	T					
431. - Phillips 66	A	Dividend	K	T					
432. - Procter & Gamble	A	Dividend	K	T	Buy (add'l)	05/16/22	J		
433. - Realty Income Corp.	A	Dividend	K	T	Buy (add'l)	05/16/22	K		
434. - Southern Company	A	Dividend	J	T					
435. - US Bancorp	A	Dividend			Sold	05/16/22	K		
436. - Verizon	A	Dividend			Sold	08/24/22	K		
437. - Waste Management	A	Dividend	K	T					
438. - WP Carey Inc.	A	Dividend	K	T	Buy (add'l)	05/18/22	K		
439. - Exchange traded and closed End funds (H):									
440. - Vanguard Intermediate ETF Term Bd Fund	C	Dividend			Sold	09/26/22	L		
441. - Vanguard short term ETF Fund	A	Dividend			Sold	09/26/22	K		
442. - Vanguard Utilities Fund	C	Dividend	M	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
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443. - Mutual funds (H):									
444. - Cohen & Steers Pref. Sec. & Inc. I Fund	A	Dividend			Sold	05/17/22	L		

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

Various: The letter I received from the Committee suggests a different description for several bonds. The letter states that "Assets must be described in sufficient detail so that they are readily identifiable to the reader." The bonds are my report are identified by the issuer, the maturiety date, and the intereest rate.that identifies the bond to anyone familiarn with bonds. You suggestrion "Bound Brook NJ BD Antic NTS (NJ) Bond" provides less information than what I have reported. Adding the word "bond" is unnecessary because all bonds on my report are listed under the header "Bonds." Therefore my second amended report makes no change to the bond descriptions.

Line 60: The maturity date for this bobnd was previously incorrectly listed and has now been corrected to be 03/01/23

Line 130: This charitable gift annuity was created by my donation to the Jewish Community Foundation of Greater Hartford.

Line 131 The identification of this trust has been changed from "Trust No. 2" to "Trust No. 1" because of the termination of Trust No. 1 in 2021, as reported on my 2021 form.

Line 162: The name of this bond has been corrected from Auburn FL to Auburndale FL

Line 238 The indentification of this trust has been changed from "Trust No. 3" to Trust No. 2" because of the termination of Trust No. 1 in 2021, as reported on my 2021 form.

Line 314: The identification of this trust has been changed from "Trust No. 4" to "Trust No. 3" because of the termination of Trust No. 1 in 2021 as reported on my 2021 form.

Line 421: The entry for this stock on my 2021 form should have been "sold part" instead of "sold."

Name of Person Reporting	Date of Report
Newman, Jon O.	09/18/2023

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/ Jon O. Newman

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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