AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

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	05/30/2025
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 senior status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2024 **to** 12/31/2024
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. 9/25/24	University of North Carolina Press Royalty	$42.43
2. 10/11/24	Hein & Co. Royalty	$433.25
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. 8/17/24	royalty from She Writes Press
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.	05/30/2025

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. Bank accounts and cash (H):									
2. Bank of America	A	Interest	L	T					
3. Raymond James Bank Deposit Program	A	Interest	N	T					
4. Brokerage Account No. 1 (H)									
5. CDs (H):									
6. Stocks (H):									
7. Air Products	D	Dividend	N	T					
8. Cisco	C	Dividend	M	T					
9. Cummins	D	Dividend	N	T					
10. Johnson and Johnson	D	Dividend	M	T					
11. Merck	D	Dividend	N	T					
12. Microsoft	D	Dividend	O	T					
13. Minnesota Miniing and Manufacturing	C	Dividend	M	T					
14. Solventum		None	K	T	Spinoff (from line 13)	04/01/24	K		
15. Total Fina	D	Dividend	M	T					
16. Mutual funds and exchange-traded funds (H):									
17. Federated Hermes U.S. Treas. MM Fund	D	Dividend	L	T	Buy	01/09/24	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; 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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☐ 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.					Buy (add'l)	07/16/24	L		
19. FIMM Treas. Only MM Fund	D	Dividend	M	T	Buy	01/09/24	M		
20.					Buy (add'l)	07/16/24	L		
21. Invesco Oppenheimer Roch AMT Free Mun. Inc. F Fund (see note Part VIII		None			Closed	11/30/24	L		
22. Invesco AMT-Free Mun. Inc. Fund (see note Part VIII)	C	Dividend	L	T					
23. JPMorgan Muni ETF	A	Dividend	K	T	Buy	10/03/24	K		
24. Schwab 1000 Fund	C	Dividend	M	T					
25. JPMorgan U.S. Treas. MM Fund	D	Dividend			Sold	01/12/24	K		
26. Bonds (H):									
27. Cape Coral FL Wtr & Swr Rev.'24 5.0	B	Interest			Redeemed	07/15/24	K		
28. Cape Coral FL 'Wtr & Swr Rev.28 5.0	C	Interest	L	T					
29. Capital Region wtr PA '24 5.0	C	Interest			Redeemed	07/15/24	L		
30. Charleston SC WATRWKS '24 5.0	B	Interest			Redeemed	01/02/24	K		
31. Colony TX tax rev'27 .5.0	C	Interest	L	T					
32. Conn. ST GO '27 5.0	C	Interest	M	T					
33. Fl St Govt Util 5.0 10/01/26	C	Interest	M	T					
34. Fl St Mun Pwr 5.0 10/01/25	B	Interest	K	T					

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35. Florida ST Trans '27 5.0	B	Interest	K	T					
36. Fl St. Environment '24 5.0	B	Interest			Redeemed	07/01/24	K		
37. Fort Pierce Fl Utils 5.0 10/01/27	B	Interest	L	T					
38. Frisco TX combination tax surp rev ctfs oblig ser 2020'27 5.0	C	Interest	L	T					
39. Kansas City MO GO '27 5.0	B	Interest	L	T					
40. Louisiana GO A '26 5.0	C	Interest	L	T					
41. Lubbock TX elec rev '27 5.0	B	Interest	L	T					
42. Manatee Cnty Fl Sch Brds '26 5.0 07/01/26	B	Interest	L	T					
43. Manatee Cnty FL Pub. Util. 5% 1/20/28	A	Interest	K	T					
44. New Mexico St GO '24 5.0	A	Interest			Redeemed	03/01/24	K		
45. Oklahoma ST Mun Pwr '27 5.0	D	Interest	M	T					
46. Oregon St Housing 2.65 '24 (see note Part VIII)		None			Redeemed	01/10/24	K		
47. Penn. St. GO '24 5.0	B	Interest			Redeemed	01/16/24	L		
48. Springfield IL Elec Rev '24 5.0	A	Interest			Redeemed	03/01/24	K		
49. Tampa-Hillsborough cnty FLexp hwy auth rev ser 2020 A5.0 07/01/27	B	Interest	L	T					
50. Washington St var purp rev '02/01/27 5.0	C	Interest	L	T					
51. West Rankin, MS util auth rev 24 5.0	A	Interest			Redeemed	01/02/24	K		

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52. Wisconsin St GO ref '27 5.0	B	Interest	L	T					
53. Brokerage Account No. 2. (H):									
54. Raymond James Bank Deposit Program	A	Interest	J	T					
55. CDs (H):									
56. Key Bank Cleveland, OH '24 5.0	A	Interest			Redeemed	03/04/24	K		
57. PNC Bank of Wilmington, DE, 5.35%, 12/20/24	D	Interest			Redeemed	09/12/24	M		
58. Bank of America CD 4.55 9/19/25		None	L	T	Buy	09/19/24	L		
59. Kearny, NJ Bank CD 4.85 01/02/25		None	L	T	Buy	10/01/24	L		
60. Stocks (H):									
61. Abbvie	C	Dividend	M	T					
62. Aflac	A	Dividend	J	T					
63. Amazon		None	M	T					
64. American Electric Power	B	Dividend	L	T	Buy (add'l)	02/02/24	J		
65. Amgen	B	Dividend	L	T					
66. Apple	B	Dividend	M	T					
67. Berkshire Hathaway		None	L	T					
68. Bristol Myers Squibb	C	Dividend	L	T	Buy (add'l)	01/10/24	J		

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69.					Buy (add'l)	02/02/24	J		
70.					Buy (add'l)	04/12/24	J		
71.					Sold (part)	09/18/24	K		
72. Broadcom	C	Dividend	N	T					
73. Chevron	D	Dividend	M	T					
74. Cigna new	A	Dividend	K	T					
75. Digital Realty Trust	B	Dividend	L	T					
76. Dow Inc.	C	Dividend	L	T					
77. Home Depot	A	Dividend	L	T					
78. IBM	B	Dividend	L	T					
79. Intel	A	Dividend			Sold	02/24/24	K		
80. Iron Mountain, Inc.	D	Dividend	M	T					
81. Johnson & Johnson	B	Dividend	L	T					
82. JP Morgan Chase	C	Dividend	M	T					
83. Kimberly-Clark	B	Dividend	L	T					
84. Lockheed Martin	A	Dividend	K	T					
85. Merck	B	Dividend	K	T					

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86. Nextera Energy	B	Dividend	L	T					
87. NNN Reit Inc.	C	Dividend	L	T					
88. Pfizer	C	Dividend	L	T	Buy (add'l)	02/02/24	J		
89.					Buy (add'l)	04/12/24	J		
90.					Sold (part)	09/19/24	L		
91. Phillips 66	C	Dividend	L	T					
92. Procter & Gamble	A	Dividend	L	T					
93. Qualcomm	A	Dividend	L	T					
94. Realty Income Corp..	D	Dividend	M	T	Buy (add'l)	01/10/24	J		
95.					Buy (add'l)	02/02/24	J		
96.					Buy (add'l)	04/12/24	J		
97. Southern Company	B	Dividend	L	T					
98. Waste Mgmt	A	Dividend	L	T					
99. Mutual Funds (H)									
100. American Tax-Exempt Bond Fund	C	Dividend	M	T					
101. JPMorgan U.S. Treas. MM Fund	D	Dividend	M	T	Buy (add'l)	04/11/24	K		
102.					Buy (add'l)	05/01/24	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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103. Goldman Sachs Dynamic Mun. Inc. Fund	C	Dividend	M	T					
104. Exchange Traded Funds (H)									
105. SPDR S&P dividend ETF Fund	C	Dividend	M	T					
106. Merrill Edge Account (H):									
107. Merrill Lynch direct deposit program	A	Interest	J	T					
108. ETF and Mutual Funds (H)									
109. AB Large Capital Growth Fund		None	K	T					
110. Invesco QQQ Trust Units Ser. 1 Fund	A	Dividend	L	T					
111. Ishares core S&P small cap etf fund	B	Dividend	K	T					
112. Ishares S&P small cap 600 growth fund	A	Dividend	K	T					
113. Vanguard Mid-Cap Value Index Fund	A	Dividend	K	T					
114. Bonds (H)									
115. Manatee County Recreational District 3.5 '50	A	Interest	K	T					
116. Stocks (H)									
117. Apple Inc.	A	Dividend	M	T					
118. Other (H):									
119. AIG fixed income Annuity (IRA)	B	Interest	K	T					

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
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C =$2,501 - $5,000
D =$5,001 - $15,000
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H1 =$1,000,001 - $5,000,000
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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
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
Newman, Jon O.	05/30/2025

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)	
120. AIG fixed income Annuity (IRA)	A	Interest	J	T					
121. - Trust No. 1 (H):									
122. - Brokerage Account No. 1 (H):									
123. - Raymond James Bank Deposit Pprogram	A	Interest	K	T					
124. - CDs (H)									
125. - Stocks (H):									
126. - 3M	C	Dividend	N	T					
127. - Adobe Systems		None	N	T					
128. - Agilent	A	Dividend	M	T					
129. - American Express	C	Dividend	N	T					
130. - Automatic Data Processing	D	Dividend	N	T					
131. - Baxter Int'l	D	Dividend	M	T					
132. - Becton Dickinson	D	Dividend	N	T					
133. - Cigna	D	Dividend	N	T					
134. - Dominion Resources	D	Dividend	M	T					
135. - Edwards Life Resources		None	N	T					
136. - Embecta	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
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

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. - Emerson Electric	B	Dividend	M	T					
138. - General Mills	D	Dividend	M	T					
139. - Home Depot	E	Dividend	P1	T					
140. - Intel	B	Dividend	M	T					
141. - IBM	A	Dividend	K	T					
142. - Keysight Technologies		None	L	T					
143. - McDonalds	D	Dividend	N	T					
144. - Microsoft	D	Dividend	P1	T					
145. - Procter & Gamble	C	Dividend	M	T					
146. - RPM Int'l	D	Dividend	O	T					
147. - Solventum		None	J	T	Spinoff (from line 126)	04/21/24	J		
148. - Travelers	B	Dividend	M	T					
149. - T Rowe Price	C	Dividend	L	T					
150. - Weyerhauser	B	Dividend	K	T					
151. -Mutual Funds and ETFs (H)									
152. - FIMM Treas. Only MM Fund	D	Dividend	M	T	Buy	02/02/24	K		
153.					Sold (part)	12/26/24	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
Newman, Jon O.	05/30/2025

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)	 (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	 (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	 (2) Date mm/dd/yy	 (3) Value Code 2 (J-P)	 (4) Gain Code 1 (A-H)	
154. - JPMorgan 100% US Treas. MM Fund	D	Dividend	M	T	Buy	02/02/24	J		
155.					Sold (part)	11/27/24	J		
156. - JPMorgan Municipal ETF	A	Dividend	L	T	Buy	10/03/24	L		
157. - Bonds (H):									
158. - Beaumont TX 'wtrwks & swr sys rev.callable '25 '27 5.0	B	Interest	K	T					
159. - Florida St Govt Util '26 5.0	B	Interest	M	T					
160. - Florida ST Trans '27 5.0 (see note Part VIII)	B	Interest	K	T					
161. - Fort Pierce FL utils auth rev, ref bds, ser 2022A '27 5.0	B	Interest	L	T					
162. - Georgia St GO '24 5.0	B	Interest			Redeemed	02/01/24	K		
163. - Manatee Cnty FL 'rev, impt ref bds, transn proj ser 2019 27 5.0	B	Interest	K	T					
164. - Mississippi ST GO '27 5.0	B	Interest	K	T					
165. - Orange Cnty FL wtr & swr revs '24 5.0	C	Interest			Redeemed	10/01/24	L		
166. - Oyster Bay, NY pub impt ref bds, ser 2021, assured guaranty 4.0 '26	B	Interest	L	T					
167. - Penn. GO '27 5.0	B	Interest	K	T					
168. - Philadelphia PA GO '28 5.0	C	Interest	L	T					
169. - Port Lucie FL Util '27 5.25	A	Interest	K	T					
170. - Sauk Centre Minn Sch '24 3.0	A	Interest			Redeemed	02/01/24	K		

1. Income Gain Codes: (See Columns B1 and D4)
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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. 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)	
171. - Tampa-Hillsborough Cnty FL '27 5.0	B	Interest	L	T					
172. - Brokerage Account No. 2 (H):									
173. - Raymond James Bank Deposit Program	A	Interest	L	T					
174. - Stocks (H):									
175. - Abbott Labs	A	Dividend	J	T					
176. - Abbvie	A	Dividend	K	T					
177. - Alphabet Inc.	A	Dividend	K	T					
178. - Amazon		None	K	T					
179. - American Electric Power	A	Dividend	K	T	Buy (add'l)	07/30/24	J		
180. - American Express	A	Dividend	K	T					
181. - Apple	A	Dividend	M	T					
182. - Blackrock	A	Dividend			Sold	07/30/24	J		
183. - Bristol Myers Squibb	A	Dividend			Sold	06/14/24	J		
184. - Broadcom		None	K	T	Buy	06/14/24	K		
185. - Chevron	B	Dividend	K	T					
186. - Coca-cola	A	Dividend	K	T					
187. - Comcast	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
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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Newman, Jon O.	05/30/2025

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)	
188. - Estee Lauder	A	Dividend	J	T					
189. - Intuitive Surgical		None	J	T					
190. - Iron Mountain	B	Dividend	K	T					
191. - Johnson & Johnson	A	Dividend	K	T					
192. - JP Morgan Chase	B	Dividend	K	T					
193. - Kimberly Clark	A	Dividend	K	T					
194. - Mastercard	A	Dividend	J	T					
195. - McDonalds	A	Dividend			Sold	07/30/24	J		
196. - Meta	A	Dividend	K	T					
197. - Microsoft	A	Dividend	L	T					
198. - Nestle	A	Dividend	J	T					
199. - Nextera Energy	A	Dividend	K	T					
200. - Nike	A	Dividend			Sold	07/30/24	J		
201. - Novo-Nordisk	A	Dividend	J	T					
202. - Pepsico	A	Dividend	K	T					
203. -Pfizer	B	Dividend	K	T	Buy (add'l)	01/10/24	J		
204.					Buy (add'l)	04/11/24	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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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)	
205. - Procter & Gamble	A	Dividend	K	T					
206. - Roche Holding	A	Dividend	J	T					
207. - Texas Instruments	A	Dividend	J	T					
208. - Union Pacific	A	Dividend	J	T					
209. - United Health	A	Dividend	J	T					
210. - Visa	A	Dividend	K	T					
211. - Waste Management	A	Dividend	K	T					
212. - Exchange Traded and Closed End Funds (H):									
213. - SPDR Nuveen Barclays Mun. Fund	A	Dividend	K	T					
214. - SPDR S&P Div ETF Fund	B	Dividend	L	T					
215. - Vanguard Intermediate ETF Term Bd Fund		None	K	T					
216. -Vanguard TTL World Stk Index Fund	C	Dividend	M	T					
217. - Mutual Funds (H):									
218. - American Funds Tax-Exempt Bond Fund		None	L	T					
219. - Cohen & Steers Realty Fund	A	Dividend	K	T					
220. - Federated Hermes Prime Obl MM Fund		None			Sold	06/14/24	K		
221. - FIMM Treas. Only MM Fund	D	Dividend	M	T	Buy	01/09/24	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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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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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)	
222. - Franklin Conv. Sec. Adv. Fund	B	Dividend	K	T					
223. - Goldman Sachs Dynamic Mun. Inc. Fund (see note Part VIII)	B	Dividend	L	T					
224. - JPMorgan U.S. Treas. MMFund	C	Dividend	L	T	Buy (add'l)	04/11/24	K		
225. - Trust No. 2: (H)									
226. - Brokerage Account No. 1 (H):									
227. - Raymond James Bank Deposit Program	A	Interest	M	T					
228. - Stocks (H):									
229. - 3M Co.	C	Dividend	M	T					
230. - Air Products	D	Dividend	M	T					
231. - Apple	C	Dividend	N	T					
232. - Danaher	A	Dividend	M	T					
233. - Fortive	A	Dividend	K	T					
234. - Johnson & Johnson	C	Dividend	M	T					
235. -Veralto	A	Dividend	K	T	Spinoff (from line 232)	01/15/24	K		
236. - Vontier	A	Dividend	J	T					
237. - Wells Fargo	A	Dividend	J	T					
238. - Bonds (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; 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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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)	
239. - Florida St Tpk '27 5.0	B	Interest	K	T					
240. - New York GO '27 5.0	C	Interest	L	T					
241. - Okla St Pwr '27 5.0	C	Interest	L	T					
242. - Port Lucie FL '27 util rev, ref impt bds, ser 2007 5.25	C	Interest	M	T					
243. - mutual funds (H):									
244. - JPMorgan U.S. Treas MM Fund	B	Dividend	N	T					
245. - Brokerage Account No. 2 (H):									
246. - Raymond James Bank Deposit Program	A	Interest	M	T					
247. - Stocks (H):									
248. - Amazon		None	K	T	Buy	01/14/24	K		
249. - American Electric Power	B	Dividend	K	T					
250. - American Express	A	Dividend	L	T					
251. - Apple	A	Dividend	N	T					
252. - Chevron	C	Dividend	L	T					
253. - Conoco Phllips	B	Dividend	L	T					
254. - Constellation Energy	A	Dividend	K	T					
255. - Digital Realty Trust Inc	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
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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
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Name of Person Reporting	Date of Report
Newman, Jon O.	05/30/2025

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)	
256. - Ebay	A	Dividend	K	T					
257. - Exelon	A	Dividend	J	T					
258. - Iron Mountain, Inc.	C	Dividend	M	T					
259. - Johnson & Johnson	B	Dividend	K	T					
260. - JP Morgan Chase	C	Dividend	M	T					
261. - Lowes	A	Dividend	K	T					
262. - Medtronic	A	Dividend	K	T					
263. - Meta	A	Dividend	K	T					
264. - Microsoft	A	Dividend	L	T					
265. - Nextera Energy	C	Dividend	M	T					
266. NNN REIT	C	Dividend	L	T	Buy (add'l)	01/10/24	J		
267. - Pepsico	B	Dividend	K	T					
268. - Pfizer	B	Dividend	K	T	Buy (add'l)	04/12/24	J		
269.					Buy (add'l)	05/29/24	J		
270. - Phillips 66	C	Dividend	L	T					
271. - PNC Financial	B	Dividend	K	T					
272. - PPG	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

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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273. - Procter & Gamble	C	Dividend	M	T					
274. - Qualcomm	B	Dividend	M	T					
275. - Realty Income Corp	C	Dividend	L	T	Buy (add'l)	01/10/24	J		
276.					Buy (add'l)	04/12/24	J		
277. - Southern Company	B	Dividend	K	T					
278. - Target	A	Dividend	K	T					
279. - Travelers	A	Dividend	K	T					
280. - Truist Finl Corp.	A	Dividend	J	T					
281. - Waste Management	B	Dividend	L	T					
282. - Bonds (H):									
283. - Wells Fargo notes 4.48 '24	A	Interest			Matured	09/01/24	K		
284. - Exchange Traded & Closed End Funds:(H)									
285. - IShares MSCI Small Cap Fund	B	Dividend	L	T					
286. - IShares Short Treasury Bond Fund	B	Dividend	K	T					
287. - SPDR S&P div ETF Fund	B	Dividend	L	T					
288. - Vanguard Intermediate Term ETF Bd Fund	B	Distribution	K	T					
289. - Vanguard short teerm ETF Bd Fund	B	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4)
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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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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)	
290. - Xtrackers MSCI EAFE Equity Fund	C	Dividend	M	T					
291. - Mutual Funds (H):									
292. - American tax-exempt bond Fund	C	Dividend	L	T					
293. - Federated Hermes Prime Cash MM Fund	D	Dividend	M						
294. -FIMM Treas. Only MM Fund	D	Dividend	M	T	Buy	01/09/24	M		
295. - Franklin Fed. Intm. Trm. Tx. Fr. Adv. Fund	C	Dividend	M	T					
296. - Goldman Sachs Dynamic Mun. Inc. Fund (see note Part VIII)	B	Dividend	L	T					
297. - JPMorgan U.S. Treas. MM Fund		None			Sold	01/24/24	N		
298. - Trust No. 3: (H)									
299. - Brokerage Account No. 1 (H):									
300. - Raymond James Bank Deposit Program	A	Interest	M	T					
301. - bonds: (H):									
302. - Austin TX '2elec util sys rev, ref impt bds, ser 2020A 5.0	B	Interest	K	T					
303. CT GO Ref '27 5.0	A	Interest	J	T					
304. - Davenport Iowa GO corp bds, ser 2019 '27 5.0	B	Interest	K	T					
305. - Ohio St Wtr '27 5.0	A	Interest	K	T					
306. - Philadelphia PA 'GO bds, ser 2019B 28 5.0	C	Interest	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
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307. - Stocks (H):	B								
308. - Apple	B	Dividend	N	T					
309. - Automatic Data Processing	B	Dividend	M	T					
310. - Caarrier Global	A	Dividend	K	T					
311. - Danaher	A	Dividend	L	T					
312. - Ecolab	C	Dividend	N	T					
313. - Nike Class B	B	Dividend	L	T					
314. - Otis	A	Dividend	K	T					
315. - RTX	B	Dividend	L	T					
316. - Veralto	A	Dividend	J	T	Spinoff (from line 311)	01/15/24	J		
317. Mutual Funds (H)									
318. - FIMM Treas. Only MM Fund		None	L	T	Buy	01/09/24	L		
319. Federated Hermes U.S. Treas. MM Fund	C	Dividend	L	T	Buy	01/09/24	L		
320. - Brokerage Account No. 2 (H):									
321. - Raymond James Bank Deposit Program	A	Interest	K	T					
322. -PNC Bank CD, Wilminton, DE, 5.35%, 12/20/24	D	Interest			Redeemed	09/12/24	L		
323. Bank of America San Francisco CD 4.55 03/25/25		None	L	T	Buy	09/24/24	L		

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324. - Stocks (H):									
325. - Abbvie	B	Dividend	L	T					
326. - Amazon		None	K	T					
327. - Ameerican Electric Power	A	Dividend	K	T	Buy (add'l)	02/02/24	J		
328. - Anasys		None	J	T					
329. - Apple	A	Dividend	M	T					
330. - Aspen Technology		None			Sold	01/15/24	J		
331. - Autodesk		None	K	T					
332. - Biogen		None	J	T					
333. - Broadcom	B	Dividend	M	T					
334. - CDW	A	Dividend	J	T					
335. - Chevron	B	Dividend	K	T					
336. - Comcast	A	Dividend	J	T					
337. - ConocoPhillips	B	Dividend	K	T					
338. - Cooper Co.		None	J	T					
339. - Copart		None	K	T					
340. - Digital Realty Trust	A	Dividend	K	T					

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341. - Docusign		None	J	T					
342. - Dolby	A	Dividend	J	T					
343. - Expeditors Int'l	A	Dividend	J	T					
344. - General Mills	A	Dividend	K	T					
345. - Home Depot	B	Dividend	L	T					
346. - IBM	A	Dividend	K	T					
347. - Ionis Pharmaceuticals		None	J	T					
348. - Iron Mountain, Inc.	B	Dividend	L	T					
349. - JPMorgan Chase	B	Dividend	L	T					
350. - Jack Henry	A	Dividend	J	T					
351. - L3 Harris Technologies	A	Dividend	K	T					
352. - Lockheed Martin	A	Dividend	K	T					
353. - Medtronic	A	Dividend	J	T					
354. - Merck	A	Dividend	K	T					
355. - Microoft	A	Dividend	L	T					
356. - MSCI Inc Com	A	Dividend	K	T					
357. - Nestle	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)
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358. - Nextera Energy	B	Dividend	K	T					
359. - Pepsico	A	Dividend	K	T					
360. - Pfizer	B	Dividend	K	T	Buy (add'l)	02/02/24	J		
361.					Buy (add'l)	04/12/24	J		
362. - Phillips 66	B	Dividend	K	T					
363. - Pool Corp.	A	Dividend	J	T					
364. - Procter & Gamble	A	Dividend	K	T					
365. - Qualcom	A	Dividend	K	T					
366. - Realty Income Corp.	C	Dividend	K	T	Buy (add'l)	02/02/24	J		
367.					Buy (add'l)	04/12/24	J		
368. - Seagate Tech.		None	J	T					
369. - Southern Company	A	Dividend	K	T					
370. - Taiwan Semiconductor	A	Dividend	K	T					
371. - TE Connectivity		None	K	T					
372. - Teradyne	A	Dividend	J	T					
373. - United Health	A	Dividend	K	T					
374. - Vertex		None	J	T					

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375. - Waste Management	A	Dividend	K	T					
376. - Exchange Traded Closed End Funds (H):									
377. - Ishares Russell 3000 Fund	A	Dividend	L	T					
378. - SPDR S&P Div ETF Fund	B	Dividend	L	T					
379. - Mutual funds (H):									
380. - American Tax-Exempt Bd Fund	B	Dividend	L	T					
381. - Goldman Sachs Dynamic Mun. Inc. Fund	C	Dividend	L	T					
382. - JPMorgan U.S. Treas. MM Fund	D	Dividend	M	T	Buy (add'l)	04/11/24	K		
383.					Buy (add'l)	05/01/24	K		
384.					Buy (add'l)	09/19/24	K		
385. - IRA consisting of Stocks and Corporate Bonds: (H)									
386. - Brokerage Account No. 1 (H):	A	Interest	J	T					
387. - Raymond James Bank Deposit Program			J	T					
388. - Brokerage Account No. 2 (H):									
389. - Raymond James Bank Deposit Program	A	Interest	J	T					
390. - Stocks (H):									
391. - Amazon		None	L	T					

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Name of Person Reporting	Date of Report
Newman, Jon O.	05/30/2025

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)	
392. - American Electric Power	A	Dividend	K	T					
393. - Amgen	A	Dividend	K	T					
394. - Apple	A	Dividend	M	T					
395. - Berkshire Hathaway		None	M	T					
396. - Chevron	B	Dividend	K	T					
397. - Digital Realty Trust	A	Dividend	L	T					
398. - General Mills	B	Dividend	K	T					
399. - Home Depot	B	Dividend	K	T					
400. - IBM	B	Dividend	K	T					
401. - Johnson & Johnson	B	Dividend	K	T					
402. - JP Morgan Chase	B	Dividend	L	T					
403. - Lockheed Martin	B	Dividend	K	T					
404. - Merck	A	Dividend	K	T					
405. - Microsoft	A	Dividend	K	T					
406. - Nextera Energy	A	Dividend	K	T					
407. - Pepsico	B	Dividend	K	T					
408. - Pfizer	B	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
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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Newman, Jon O.	05/30/2025

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.)*

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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. - Phillips 66	B	Dividend	L	T					
410. - Procter & Gamble	A	Dividend	K	T					
411. - Realty Income Corp.	B	Dividend	K	T					
412. - Southern Company	A	Dividend	K	T					
413. - Waste Management	A	Dividend	K	T					
414. - Exchange traded and closed End funds (H):									
415. - Vanguard Utilities Fund	C	Dividend	M	T					
416. - Mutual funds (H):									
417. - JPMorgan U.S. Treas. MM Fund	B	Dividend			Sold	12/18/24	L	A	
418.									

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

Line 21: Invesco Rochester AMT-Muni Fund changed its name to Invesco AMT-free Muni Income Fund, shown on line 22.
Line 22:See note for line 21, above.
Line 47: The disposition of this bond is marked "sold," but the bond was actually "called." The program does not provide for the disposition "called."
Line 160: The date of maturity of this bond has been changed from '25 to '27.

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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/ 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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