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
Rikelman, Julie	U.S. Court of Appeals, First Circuit	05/15/2025
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, Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
John Joseph Moakley U.S. Courthouse One Courthouse Way Suite 8730 Boston, MA 02210		

IMPORTANT NOTES: ***The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.***

I. POSITIONS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Trustee	Trust #1 (no reportable assets)
2.		
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements.)*

☐ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.	2011	NBC Universal, Inc.; Fixed 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.	2024	Financial Industry Regulatory Authority
2.		
3.		
4.		

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

V. GIFTS. *(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Rikelman, Julie	05/15/2025

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. Chase Bank cash account	A	Interest	M	T					
2. Citibank cash account	A	Interest	M	T					
3. Charles Schwab 1 (H)									
4. -Charles Schwab cash account	A	Interest	L	T					
5. -IVV	B	Dividend	L	T					
6. -ARTKX	A	Dividend	K	T					
7. -SWANX	A	Dividend	K	T					
8. -SFLNX	C	Dividend	M	T					
9. -SFSNX	B	Dividend	M	T					
10. -SWPPX	B	Dividend	M	T					
11. -SWNTX	A	Dividend	J	T					
12. -VIMAX	B	Dividend	L	T					
13. -MA St Tpk Auth		None	J	T					
14. -Medway MA (H)	A	Interest	J	T					
15. -IEFA	A	Dividend	K	T					
16. -HEFA	A	Dividend	K	T					
17. -HEZU	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

Name of Person Reporting	Date of Report
Rikelman, Julie	05/15/2025

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)	
18. -OEF	A	Dividend	K	T					
19. -SCHF	A	Dividend	K	T					
20. -SCHG	A	Dividend	K	T					
21. -SCHX	A	Dividend	K	T					
22. -VIGI	A	Dividend	K	T					
23. -VTEB	A	Dividend	K	T					
24. Charles Schwab 2 (H)									
25. -Charles Schwab cash account	A	Interest	J	T					
26. -ARTQX	A	Dividend	J	T					
27. -CSRSX	B	Dividend	K	T					
28. -DODIX	B	Dividend	K	T					
29. -PIFZX	A	Dividend	K	T					
30. -PTTAX	A	Dividend	K	T					
31. -SFLNX	A	Dividend	K	T					
32. -SWPPX	A	Dividend	L	T					
33. -SWAGX	A	Dividend	J	T					
34. Charles Schwab 3 (H)									

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35. -SWPPX	A	Dividend	K	T					
36. Charles Schwab 4 (H)									
37. -SWPPX	B	Dividend	L	T					
38. Charles Schwab 5 (H)									
39. -SWPPX	B	Dividend	L	T					
40. FINRA Savings Plus 401K(H)									
41. -Vanguard Inst Index Fund Inst Plus		None	M	T					
42. -Vanguard Target Retire 2035		None	P1	T					
43. Olstein All Cap Value Fund	D	Dividend	M	T					
44. STB/NBC 401(k)(H)									
45. -Fidelity Contrafund	D	Dividend	M	T					
46. -Fidelity Real Estate	B	Dividend	L	T					
47. -Fidelity Cash Reserves	A	Dividend	J	T					
48. -Mercer GE Intl		None	M	T					
49. -SIVIX	E	Dividend	M	T					
50. -Vanguard Target 2035		None	K	T					
51. -NBCU Large Cap Stock Fund		None	K	T					

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2. Value Codes (See Columns C1 and D3)
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52. Center 401k(H)									
53. -Vanguard Target Retirement 2035	D	Dividend	M	T					
54. -Fidelity 500 Index Fund	D	Dividend	O	T					
55. Investment Account # 1 (H)									
56. -VWIGX	C	Dividend	K	T					
57. -VSMAX	A	Dividend	L	T					
58. -VFIAX	C	Dividend	N	T					
59. MA 529 1 (H)									
60. -MA Aggressive Growth		None	J	T	Buy	04/18/24	J		
61. -MA Moderate Growth		None	J	T	Buy	04/18/24	J		
62. -MA Conservative		None	J	T	Buy	04/18/24	J		
63. -MA Fidelity 500 Index		None	J	T	Buy	04/18/24	J		
64. MA 529 2 (H)									
65. -MA Aggressive Growth		None	J	T	Buy	04/18/24	J		
66. -MA Moderate Growth		None	J	T	Buy	04/18/24	J		
67. -MA Conservative		None	J	T	Buy	04/18/24	J		
68. -MA Fidelity 500 Index		None	J	T	Buy	04/18/24	J		

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69. NY 529 1 (H)									
70. -Growth Stock Index Portfolio		None	M	T					
71. NY 529 2 (H)									
72. -Mid-Cap Stock Index Portfolio		None	K	T					

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

Although I am a trustee of Trust #1, there are no reportable assets in the trust.

Name of Person Reporting	Date of Report
Rikelman, Julie	05/15/2025

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/ Julie Rikelman

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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One Columbus Circle, N.E.
Washington, D.C. 20544