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
BERZON, MARSHA S.	U.S. CA NINTH CIRCUIT	8/4/2025
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	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 to 12/31/2024
7. Chambers or Office Address		
95 SEVENTH STREET P.O. BOX 1939393 SAN FRANCISCO, CA 94119-3939		

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.	ADJUNCT PROFESSOR	UC LAW SAN FRANCISCO
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.		
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.	2024	UC LAW SAN FRANCISCO	$7,041.70
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	SELF-EMPLOYED ATTORNEY
2.	2024	UC BERKELEY LAW SCHOOL
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.	U C IRVINE	4/4/2024-4/6/2024	IRVINE, CA	EDUCATIONAL ACTIVITIES	TRAVEL. LODGING, MEALS
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
BERZON, MARSHA S.	8/4/2025

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 OF AMERICA ACCOUNTS	A	Interest	L	T					
2. STERLING BANK & TRUST ACCOUNTS	D	Interest	M	T					
3. BANK OF THE ORIENT ACCOUNT	E	Interest	O	T					
4. CORNING INC - COMMON STOCK	D	Dividend	N	T					
5. PEPSICO INC - COMMON STOCK	B	Dividend	L	T					
6. BERKSHIRE HATHWAY - COMMON STOCK		None	L	T					
7. FISERV INC - COMMON STOCK		None	M	T					
8. QUALCOMM INC	B	Dividend	K	T					
9. MEDTRONIC PLC	A	Dividend	K	T					
10. NOVARTIS AG	B	Dividend	K	T					
11. EXPEDIA INC		None	K	T					
12. BECTON DICKINSON&CO	A	Dividend	K	T					
13. ENVOIS CORPORATION		None	K	T					
14. BOOKING HOLDINGS INC	A	Dividend	L	T					
15. BLACKROCK INC	B	Dividend	L	T					
16. EATON CORP PLC	B	Dividend	L	T					
17. EMERSON ELECTRIC CO	A	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4)
2. Value Codes (See Columns C1 and D3)
3. Value Method Codes (See Column C2)

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
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
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
BERZON, MARSHA S.	8/4/2025

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. EBAY INC	A	Dividend	K	T					
19. ALCON INC	A	Dividend	J	T					
20. CARRIER GLOBAL CORP	A	Dividend	J	T					
21. AGILENT TECHNOLOGIES CO	A	Dividend	K	T					
22. LOWES COMPANIES INC	A	Dividend	K	T					
23. LUCID GROUP INC		None	J	T					
24. ULTA BEAUTY INC		None	K	T					
25. ZEBRA TECHNOLOGIES		None	J	T					
26. ESAB CORP	A	Dividend	K	T					
27. MOODYS CORP	A	Dividend	K	T					
28. RTX CORP*1	A	Dividend	K	T					
29. TAIWAN SEMICONDUCTOR	A	Dividend	L	T					
30. SANDOZ GROUP AG	A	Dividend	J	T					
31. SCHWAB CALIFORNIA MUNICIPAL MONEY FUND-ULTRA	E	Dividend	O	T					
32. RETIREMENT ACCOUNT (H)									
33. -DFA U.S. SMALL CAP VALUE PORT	A	Dividend	L	T	Sold (part)	08/30/24	J	B	
34. -VANGUARD SMALL-CAP GROWTH INDEX FUND (ADM)	A	Dividend	K	T	Sold (part)	08/30/24	J	B	

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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BERZON, MARSHA S.	8/4/2025

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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)	
35. -VANGUARD REAL ESTATE INDEX FUND (ADM)	A	Dividend	J	T	Sold (part)	08/30/24	J	A	
36. -VANGUARD 500 INDEX FUND (ADM)	C	Dividend	N	T	Sold (part)	08/30/24	J	D	
37. -VANGUARD TOTAL INTL STOCK INDEX FUND (ADM)	D	Dividend	M	T	Sold (part)	08/30/24	J	B	
38. -VANGUARD INTERMED.-TERM BOND INDEX FUND (ADM)	D	Dividend	N	T	Sold (part)	08/30/24	J		
39. -VANGUARD SHORT-TERM BOND INDEX FUND (ADM)	D	Dividend	N	T	Sold (part)	08/30/24	K		
40. -VANGUARD INFLATION-PROTECTED SECS (ADM)	C	Dividend	M	T	Sold (part)	08/30/24	J		
41. -VANGUARD MID-CAP VALUE INDEX ADMIRAL	B	Dividend	L	T	Sold (part)	08/30/24	J	B	
42. CAPITAL ACCOUNT IN ALTSHULER BERZON LLP		None	J	U					
43. SCHWAB CASH AND BANK SWEEP	A	Interest	M	T					
44. DFA EMERGING MARKETS CORE EQUITY	D	Dividend	N	T					
45. DFA INTERNATIONAL VALUE	D	Dividend	N	T					
46. DFA U.S. LARGE CAP VALUE	D	Dividend	N	T					
47. DFA US MICRO CAP	A	Dividend	L	T					
48. DFA US SMALL CAP I	B	Dividend	M	T					
49. DIMENSIONAL INTERNATIONAL SMALL CAP ETF	B	Dividend	L	T					
50. DIMENSIONAL INTERNATIONAL SMALL CAP VALUE ETF	C	Dividend	M	T					
51. DIMENSIONAL U.S. TARGETED VALUE ETF	D	Dividend	O	T					

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52. DIMENSIONAL U.S. MARKETWIDE VALUE ETF	D	Dividend	N	T					
53. INVESCO QQQ TRUST	B	Dividend	L	T					
54. ISHARES CORE MSCI EMERGING MARKETS ETF	B	Dividend	L	T					
55. ISHARES CORE S&P 500 ETF	B	Dividend	L	T					
56. ISHARES S&P SMALL-CAP ETF	A	Dividend	J	T					
57. SPDR PORTFOLIO TIPS ETF	E	Dividend	O	T					
58. SPDR S&P 500 ETF	E	Dividend	P1	T					
59. VANGUARD CA INTER TERM TAX EXEMPT ADM	D	Dividend	L	T	Buy	04/10/24	K		
60.					Buy (add'l)	08/28/24	K		
61. VANGUARD EQUITY INCOME FD ADM	D	Dividend	M	T					
62. VANGUARD FTSE DEVELOPED MARKETS ETF	E	Dividend	O	T					
63. VANGUARD INFORMATION TECHNOLOGY INDEX ETF	B	Dividend	N	T					
64. VANGUARD INTERMEDIATE TAX EXEMPT ADM	F	Dividend	P1	T					
65. VANGUARD LTD TERM TAX EXEMPT ADM	B	Dividend	L	T	Buy	01/22/24	L		
66.					Buy (add'l)	03/11/24	J		
67.					Buy (add'l)	06/14/24	K		
68. VANGUARD SHORT TERM TAX EXEMPT	E	Dividend	P1	T					

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69. CALIFORNIA MUN FIN AUTH REV 5% 10/01/2024	B	Interest			Matured	10/01/24	K		
70. CALIFORNIA ST DEPT WTR RES CEN 5% 12/01/2028	B	Interest			Redeemed	12/01/24	K		
71. SCHWAB CASH *2	A	Interest	J	T					
72. CALIFORNIA ST PUB WKS BRD LEASE REV 4% 05/01/2037		None	K	T	Buy	12/13/24	K		
73. CENTINELA VALLEY CALIF UN HIGH 4% 08/01/2034	B	Interest	L	T					
74. CONTRA COSTA CALIF CMNTY COLLE 5% 08/01/2035	C	Interest	M	T					
75. ENERGY NORTHWEST WASH ELEC REV 5%	C	Interest	L	T					
76. GLENDALE CA ELEC RE 5% 39 ELEC UTIL DUE 2/1/2039		None	L	T	Buy	08/02/24	L		
77. LOS ANGELES CA DEPT ARPTS AMT SR INTL BDS REV CLBL 5.50% 5/15/2038	B	Interest	K	T	Buy	01/31/24	K		
78. HILLSBOROUGH CTY FLA AVIATION 5% 10/01/2035	C	Interest			Sold	10/01/24	L	A	
79. LOS ANGELES CALIF DEPT WTR & PWR 5% 07/01/2037	C	Interest	L	T					
80. LOS ANGELES CALIF DEPT WTR & PWR 5% 07/01/2038	C	Interest	M	T					
81. LOS ANGELES CNTY CALIF MET TRA 5% 06/01/2037*3	C	Interest	L	T					
82. MASSACHUSETTS BAY TRANSN AUTH 5% 07/01/2037	C	Interest	L	T					
83. MIRACOSTA CALIF CMNTY COLLEGE 5% 08/01/2037	B	Interest	K	T					
84. MORELAND CALIF SCH DIST 5% 08/01/2024	B	Interest			Matured	08/01/24	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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85. NEW YORK ST DORM AUTH REVS NON 5% 07/01/2035	C	Interest	L	T					
86. SAN FRANCISCO CALIF CITY & CNT 4% 6/15/2035	B	Interest	L	T					
87. SAN FRANCISCO CALIF CITY & CNT 5% 05/01/2033	D	Interest	M	T					
88. SAN FRANCISCO CALIF CITY & CNT 5% 11/01/2037	B	Interest	K	T					
89. SAN MATEO CNTY CALIF TRAN DIST 5% 06/01/2026	A	Interest			Sold	01/30/24	K		
90. SWEETWATER CALIF UN HIGH SCH D 5% 08/01/2036	D	Interest	M	T					
91. TEXAS WOMANS UNIV REV FING SYS 5% 07/01/2037	C	Interest	L	T					
92. UNIVERSITY CALIF REVS 5% 05/15/2027	B	Interest	K	T					
93. UNIVERSITY WIS HOSPS & CLINICS 5% 04/01/2030	B	Interest	K	T					
94. LOS ANGELES CALIF UNI SCH DISTR CTF PTR SER A 5% 10/1/2038	B	Interest			Buy	10/03/24	M		
95.					Sold	12/26/24	M		
96. UNIV CA REGTS MED CNTR 5% 5/15/2039		None	M	T	Buy	12/26/24	M		
97. IRA(H)									
98. -SCHWAB CASH AND BANK SWEEP	A	Interest	J	T					
99. -ISHARES CORE U.S. REIT ETF	A	Dividend	K	T					
100. -SCHWAB U.S. REIT ETF	C	Dividend	L	T					
101. -VANGUARD TOTAL BOND MKT INDEX ADMIRAL	B	Dividend			Sold	08/28/24	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)
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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)
102. -ISHARES CORE US AGGREGATE BOND ETF	A	Dividend	K	T	Buy	08/28/24	K	
103. -SPDR PORTFOLIO TIPS ETF	A	Dividend	J	T	Buy	03/11/24	J	

1. Income Gain Codes: (See Columns B1 and D4)
2. Value Codes (See Columns C1 and D3)
3. Value Method Codes (See Column C2)

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
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
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
BERZON, MARSHA S.	8/4/2025

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

*1 RTX CORP HAD CHANGED ITS NAME IN JULY 2023 - WAS FORMERLY RAYTHEON TECHNOLOGIES (ALSO REPORTED ON 2023 REPORT).
*2 SCHWAB CASH WAS PREVIOUSLY NAMED CASH AND MARGIN INTEREST.
*3 LOS ANGELES CNTY CALIF MET TRA 5% 06/01/2037 PREVIOUSLY SHOWED INCORRECT MATURITY DATE OF 07/01/2023.

Name of Person Reporting	Date of Report
BERZON, MARSHA S.	8/4/2025

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/ **MARSHA S. BERZON**

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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