AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 13101-13111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Bumatay, Patrick J.	U.S. Court of Appeals for the Ninth Circuit	05/01/2024
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	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final	01/01/2023 **to** 12/31/2023
	5b. ☐ Amended Report	
7. Chambers or Office Address		
Chambers of Hon. Patrick J. Bumatay 101 W. Broadway, Suite 700 San Diego, CA 92101		

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
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.	06/3/2023	Georgetown University Center for the Constitution, teaching income	$1,000.00
2.	10/18/2023	Brigham Young University, teaching income	$2,000.00
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.		
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.	Federalist Society - UNC and Duke Student Chapters	01/10/23-01/12/23	Durham, NC	Speech to student groups	transportation, meals, hotel
2.	Institute of Law and Economic Policy	01/26/23-01/27/23	San Diego, CA	Moderate panel	transportation, meals, hotel
3.	Federalist Society - West Coast Conference	01/27/23-01/28/23	Simi Valley, CA	Moderate panel	transportation, meals, hotel
4.	Northwestern University Law School	03/02/23-03/03/22	Chicago, IL	Moot court	transportation, meals, hotel

5.	Federalist Society - Annual Student Convention	03/03/23-03/04/23	Austin, TX	Moderate panel	transportation, meals, hotel
6.	Judicial Education Institute - Corpus Linguistics Conference	03/20/23-03/21/23	Washington, DC	Speech to judical education conference	transportation, meals, hotel
7.	Pepperdine Law School	03/23/23-03/24/23	Malibu, CA	Participate on panel to law students	transportation, meals, hotel
8.	Federalist Society - Harvard Student Chapter	03/31/23-04/02/23	Cambridge, MA	Speech to student group	transportation, meals, hotel
9.	Georgetown Center for the Constitution - Originalism for Judges Conference	06/02/23-06/04/23	Sarasota, FL	Education Conference, panelist	transportation, meals, hotel
10.	Notre Dame Law School - Religious Liberty Conference	07/11/23-07/13/23	London, England	Education Conference	transportation, meals, hotel
11.	Federal Judicial Center/NYU	07/17/23-07/20/23	New York, NY	Education Conference	transportation, meals, hotel
12.	Federalist Society - University of Michigan Student Chapter	09/22/23-09/23/23	Ann Arbor, MI	Speech to student group	transportation, meals, hotel
13.	Federalist Society - Cornell, UPenn, and Yale Student Chapters	10/03/23-10/05/23	Ithaca, NY; Philadelphia, PA; New Haven, CT	Speech to student groups	transportation, meals, hotel
14.	Brigham Young University Law School	10/17/23-10/19.23	Provo, UT	Judge-in-Residence, teaching	transportation, meals, hotel
15.	Federalist Society - Portland Chapter and Stanford Student Chapter	10/25/23-10/26/23	Portland, OR; Palo Alto, CA	Speech	transportation, meals, hotel
16.	Federalist Society - National Lawyers Convention	11/08/23-11/11/23	Washington, DC	Education Conference, moderate panel, speech	transportation, meals, hotel

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
Bumatay, Patrick J.	05/01/2024

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. Trust #1 - (John Hancock Universial Life Insurance Policy)		None	O	T					
2. Merrill Lynch Roth IRA Account (H)									
3. - Merrill Lynch cash/money accounts	A	Interest	J	T					
4. - Vanguard 500 Index Funds SHS EFT (VOO)	B	Dividend	K	T					
5. Morvillo Abramowitz 401(k) Account (H)									
6. - Wells Fargo/Allspring Special Small Cap	B	Dividend	K	T					
7. - T Rowe Price Retirement 2040	C	Dividend	K	T					
8. Ohio College Advantage 529 Account #1 (H)									
9. - 2038 Age-Based Fund		None	J	T					
10. Ohio College Advantage 529 Account #2 (H)									
11. - 2038 Age-Based Fund		None	J	T					
12.									
13.									
14.									
15.									
16.									
17.									

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
Bumatay, Patrick J.	05/01/2024

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

Name of Person Reporting	Date of Report
Bumatay, Patrick J.	05/01/2024

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/ Patrick J. Bumatay

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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