AO 10
Rev. 1/2019

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 101-111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Carson, Joel M.	United States Court of Appeals for the Tenth Circuit	08/25/2024
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**
Article III - Active Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
500 N. Richardson Roswell, NM 88201		

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 pp. 9-13 of filing instructions.)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Trustee	[redacted] Trust No. 1
2.	Vice-President & Secretary	Sierra Blanca Livestock Company
3.	Manager	Sierra Blanca Mercantile LLC
4.	Manager	Sierra Blanca Farms LLC
5.	Manager	Sierra Blanca Trading LLC
6.	Manager	East Mescalero Properties LLC
7.	Personal Representative	[redacted] Estate #1

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions.)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions.)*

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 AND TYPE
1.	2023	BCA Medical Associates
2.		
3.		
4.		

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

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)

☐ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	Pepperdine University Caruso School of Law	March 30-April 1, 2023	Malibu, CA	Moot Court	Transportation, Meals, Lodging
2.					
3.					
4.					
5.					

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V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*

☑ NONE *(No reportable gifts.)*

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

VI. LIABILITIES. *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*

☐ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.	Farm Credit Services	Real Property Loan	O
2.	Chase	Credit Line	K
3.			
4.			
5.			

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ 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)	D. (5) Identity of buyer/seller (if private transaction)
1. Wells Fargo Savings	A	Interest	J	T					
2. Wells Fargo Savings	A	Interest	J	T					
3. Wells Fargo Checking		None	J	T					
4. Optum Bank HSA Savings	A	Interest	J	T					
5. Pioneer Bank Checking		None	K	T					
6. Artesia Credit Union Savings	A	Interest	L	T					
7. Eagle Federal CU Savings	A	Int./Div.	J	T					
8. Sierra Blanca Farms LLC ([redacted] company)		None	L	W					
9. Sierra Blanca Mercantile LLC ([redacted] company)(X)	F	Distribution	L	W					
10. Sierra Blanca Livestock Co. Inc. ([redacted] company)		None	N	W					
11. East Mescalero Properties LLC[redacted] company)	D	Rent	M	W					
12. Ameritrade Money Market Account[redacted]	A	Interest	J	T					
13. Ameritrade Money Market Account[redacted]	A	Interest	M	T					
14. Edward D. Jones Cash Account[redacted]	A	Interest	K	T					
15. AAPL		None	M	T					
16. T		None	J	T					
17. WBD		None	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

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18. COP	B	Dividend	K	T					
19. GSK		None	J	T					
20. HLN		None	J	T					
21. PNOPX	A	Dividend	J	T					
22.									
23. WFC	A	Dividend	J	T					
24. Artesia Special Hospital District GO Bond	A	Interest	J	T					
25. XOM	B	Dividend	K	T					
26. DINO	A	Dividend	K	T	Open	12/01/23	K		
27. HEP	B	Dividend			Merged (with line 26)	12/01/23	K		
28. NLY	B	Dividend	K	T					
29. GTE		None	J	T					
30. OKE	A	Dividend	J	T					
31. PLTR		None	J	T					
32. RTL	A	Dividend	J	T	Buy	03/09/23	J		
33. Ameritrade Money Market Account [redacted]	A	Interest	M	T					
34. Fidelity Freedom Index 2035 - Premier Fund	A	Int./Div.	P1	T					

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35. TDOC		None	J	T					
36. GOOGL		None	K	T					
37. GILD	A	Dividend	J	T					
38. PTON		None	J	T					
39. RCL		None	J	T					
40. COP	A	Dividend	L	T					
41. PSX	A	Dividend	K	T					
42. BABA		None	K	T					
43. BRC	A	Dividend	J	T					
44. ILMN		None	J	T					
45. AMZN		None	L	T					
46. TMO	A	Dividend	L	T					
47. TGT	A	Dividend	J	T					
48. MCD	A	Dividend	J	T					
49. AMGN	A	Dividend	J	T					
50. WBA	A	Dividend	J	T					
51. AAL	A	Dividend	J	T					

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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)	(5) Identity of buyer/seller (if private transaction)
52. AAPL	A	Dividend	M	T					
53. COKE	A	Dividend	L	T					
54. JNJ	C	Dividend	K	T					
55. DIS	A	Dividend	K	T					
56. HOMB	A	Dividend	J	T					
57. LUV	A	Dividend	J	T					
58. NTDOY	A	Dividend	J	T					
59. AMC		None	J	T					
60. GME		None	J	T					
61. GE	A	Dividend	J	T					
62. HOLX		None	J	T					
63. PTON		None	J	T					
64. NextGen 529 Blackrock Age 8-10 Yrs A		None			Closed	03/07/23	K		
65. NextGen 529 Blackrock Age 11-13 Yrs A		None			Closed	03/07/23	K		
66. Scholars Edge Today Portfolio A (1)		None	K	T	Buy (add'l)	03/07/23	K		
67. Scholars Edge Today Portfolio A (2)		None	K	T	Buy (add'l)	03/07/23	K		
68.									

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
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2. Value Codes (See Columns C1 and D3)
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69. QPSIQ (cash account)	A	Interest			Closed	03/09/23	J		
70. ACGYX	A	Dividend	K	T					
71. ANNPX	A	Dividend			Sold	01/30/23	K		
72.					Sold	01/30/23	K		
73. AVALX	A	Dividend	K	T	Buy	01/30/23	K		
74.					Buy (add'l)	08/10/23	J		
75. BHYIX	A	Dividend	J	T	Buy (add'l)	01/30/23	J		
76.					Sold (part)	08/10/23	J		
77. BMGAX		None			Sold	01/30/23	K		
78. CMGIX		None			Sold	01/30/23	J		
79. CLMVX	B	Dividend			Sold	01/30/23	K		
80. FBGRX	A	Distribution	K	T	Sold (part)	01/30/23	J		
81.					Sold (part)	08/10/23	J		
82. FDUXX (cash account)	A	Interest	J	T	Open	03/09/23	J		
83. FEMKX	A	Dividend	K	T					
84. FOCPX	A	Dividend	K	T	Buy	01/30/23	J		
85.					Buy (add'l)	05/30/23	K		

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86. FTRBX	A	Dividend	K	T	Buy	01/30/23	J		
87. GILHX	A	Dividend	K	T	Buy	01/30/23	J		
88.					Buy (add'l)	08/10/23	J		
89. HDGIX		None			Merged (with line 91)	03/22/23	K		
90.					Buy (add'l)	01/30/23	J		
91. HDGYX		None	K	T	Open	03/22/23	K		
92. LSIIX	B	Dividend	K	T	Buy	01/30/23	J		
93.					Buy (add'l)	08/10/23	J		
94. MDIJX	A	Dividend	K	T					
95.					Sold (part)	01/30/23	J		
96. NPSRX	A	Dividend			Sold	08/10/23	J		
97. OAYMX	A	Dividend	K	T	Buy	08/10/23	K		
98. ODIYX		None	K	T					
99.					Buy (add'l)	12/20/23	J		
100. PFINX	A	Dividend			Sold (part)	01/30/23	J		
101.					Sold	08/10/23	J		
102. PIMIX	B	Dividend	K	T	Open	03/22/23	K		

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103. PONPX	A	Dividend			Merged (with line 102)	03/22/23	K		
104. PRBLX	A	Dividend	K	T					
105.					Sold (part)	01/30/23	J		
106. RAIIX		None			Sold	03/09/23	K		
107. RYPNX	A	Dividend			Sold	01/30/23	K		
108. SICWX	A	Dividend	K	T					
109.					Sold (part)	08/10/23	J		
110. UIITX	A	Dividend	K	T	Buy	01/30/23	J		
111. VENAX	A	Dividend	J	T	Sold (part)	01/30/23	J		
112. VLMIX	A	Dividend	K	T	Buy	01/30/23	K		
113. WFMIX	A	Dividend	K	T					
114.					Sold (part)	01/30/23	J		
115.									
116. Ameritrade Money Market [redacted]	A	Interest	J	T					
117. KNX	A	Dividend	J	T					
118. TA		None							
119.					Buy (add'l)	01/06/23	J		

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120.					Merged (with line 121)	05/15/23	J	D	
121. BP	A	Dividend	J	T					
122.					Buy (add'l)	01/06/23	J		
123.					Buy (add'l)	08/28/23	J		
124. VOOG	A	Dividend	J	T	Buy	08/28/23	J		
125.					Buy (add'l)	10/02/23	J		
126.					Buy (add'l)	12/04/23	J		
127.									
128. Ameritrade Money Market [redacted]	A	Interest	J	T					
129. CSX	A	Dividend	J	T					
130. HOMB	A	Dividend	J	T					
131.					Buy (add'l)	01/06/23	J		
132.					Buy (add'l)	11/05/23	J		
133. VOOG	A	Dividend	J	T	Buy	02/10/23	J		
134.									
135. [redacted] Estate No. 1 (X-see section VIII)									
136. -Pioneer Bank Checking		None	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
Carson, Joel M.	08/25/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ 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)	D. (5) Identity of buyer/seller (if private transaction)
137. -First National Bank Checking		None	J	T					
138. -Real Property, Eddy County, NM		None	J	W					
139. -Real Property (2), Eddy County, NM (** see sec. VIII)		None	J	W					
140.									
141. [redacted] Trust No. 1									
142. -Rental Residence, Eddy County NM (MM1)		None	N	T					
143. -Edward D Jones Cash Account (MM1)	A	Interest	K	T					
144. -AMZN		None	J	T					
145. -AAL		None	J	T					
146. -AAPL	A	Dividend	M	T					
147. -BP	A	Dividend	J	T					
148. -T	A	Dividend	J	T					
149. -CHKP		None	J	T					
150. -COP	A	Dividend	K	T					
151. -DINO	A	Dividend	J	T	Open	12/01/23	J		
152. -ESV	A	Dividend	J	T					
153. -FDS	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
Carson, Joel M.	08/25/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ 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)	D. (5) Identity of buyer/seller (if private transaction)
154. -GSK	A	Dividend	J	T					
155. -HEP	A	Dividend			Merged (with line 151)	12/01/23	J		
156. -HLN		None	J	T					
157. -HOMB	A	Dividend	J	T					
158. -ITW	A	Dividend	J	T					
159. -JNJ	A	Dividend	J	T					
160. -JPM	A	Dividend	J	T					
161. -LOW	A	Dividend	K	T					
162. -MCHP	A	Dividend	J	T					
163. -MGM	A	Dividend	J	T					
164. -NCLH		None	J	T					
165. -PFE	A	Dividend	J	T					
166. -RIG		None	J	T					
167. -SHO	A	Dividend	J	T					
168. -SLB	A	Dividend	J	T					
169. -TUP		None	J	T					
170. -WBD		None	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

Name of Person Reporting	Date of Report
Carson, Joel M.	08/25/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ 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)	D. (5) Identity of buyer/seller (if private transaction)
171. -WFC	A	Dividend	J	T					
172. -XEL	A	Dividend	J	T					
173.									
174. -ANNPX	A	Dividend			Sold	01/30/23	K		
175. -AVALX	A	Dividend	J	T	Buy	01/30/23	J		
176. -BHYIX	A	Dividend	K	T					
177.					Sold (part)	08/10/23	J		
178.					Sold (part)	01/30/23	J		
179. -CLMVX	A	Dividend			Sold	01/30/23	K		
180. -CMGIX	A	Dividend			Sold	01/30/23	J		
181. -FBGRX	A	Dividend	J	T					
182.					Sold (part)	01/30/23	J		
183.					Sold (part)	08/10/23	J		
184. FEMKX	A	Dividend	J	T	Buy	01/30/23	J		
185. -FIKAX	A	Dividend							
186.					Sold (part)	01/30/23	J	A	
187.					Sold	11/07/23	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
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P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
S =Assessment
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Name of Person Reporting	Date of Report
Carson, Joel M.	08/25/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets)	B. Income during reporting period		C. Gross value at end of reporting period		D. 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)	(5) Identity of buyer/seller (if private transaction)
188. -FOCPX	A	Dividend	K	T					
189.					Buy (add'l)	05/30/23	J		
190.					Sold (part)	08/10/23	J		
191. FTRBX	A	Dividend	K	T	Buy	01/30/23	K		
192.					Buy (add'l)	08/10/23	J		
193. -GILHX	A	Dividend	K	T					
194.					Buy (add'l)	01/30/23	J		
195.					Buy (add'l)	08/10/23	J		
196. -HDGIX	A	Dividend	K	T					
197.					Buy (add'l)	01/30/23	J		
198. -LSIIX	B	Dividend	L	T					
199.					Buy (add'l)	01/30/23	K		
200. -MDIJX	A	Dividend	K	T					
201.					Sold (part)	01/30/23	J		
202. -NPSRX	A	Dividend							
203.					Buy (add'l)	01/30/23	J		
204.					Sold	08/10/23	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	
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Name of Person Reporting	Date of Report
Carson, Joel M.	08/25/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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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)	D. (5) Identity of buyer/seller (if private transaction)
205. -OAYMX	A	Dividend	J	T	Buy	08/10/23	J		
206. -ODIYX	A	Dividend	J	T					
207.					Sold (part)	12/23/23	J		
208. -PFINX	A	Dividend							
209.					Sold	08/10/23	J		
210. -PONPX	B	Dividend	K	T					
211.					Buy (add'l)	01/30/23	J		
212. -PRBLX	A	Dividend	J	T					
213.					Sold (part)	01/30/23	J		
214. -QPSIQ (cash account)					Closed	03/09/23	J		
215. QPRMQ (cash account)	A	Interest	J	T	Open	03/09/23	J		
216. -RAIIX	A	Dividend							
217.					Sold (part)	01/30/23	J	A	
218.					Sold	05/30/23	K		
219. -RYPNX	A	Dividend			Sold	01/30/23	J		
220. -SICWX	A	Dividend	J	T					
221.					Sold (part)	08/10/23	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
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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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)	D. (5) Identity of buyer/seller (if private transaction)
222. -UIITX	A	Dividend	K	T	Buy	01/30/23	J		
223.					Sold (part)	08/10/23	J		
224. -VLMIX	A		J	T	Buy	01/30/23	J		
225. -WFMIX	A	Dividend	J	T					
226.					Sold (part)	01/30/23	J		
227.									

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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	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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Carson, Joel M.	08/25/2024

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

* With respect to line nos.64-67, broker advises that income and yields are not reported on customer statement and are not otherwise available.

X - line nos 136-139: assets listed below heading listed as a result of duties as personal representative of estate.

** property identified during probate proceedings.

Name of Person Reporting	Date of Report
Carson, Joel M.	08/25/2024

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. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Joel M. Carson

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. § 104)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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Washington, D.C. 20544