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
Carson, Joel M.	United States Court of Appeals for the Tenth Circuit	08/19/2025
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**
Article III - Active Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
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 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	[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 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.			
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	BCA Medical Associates
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.	Farm Credit Services	Real Property Loan	O
2.	Chase	Credit Line	K
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Carson, Joel M.	08/19/2025

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. Wells Fargo Savings(Y)									
2. Wells Fargo Savings(Y)									
3. Wells Fargo Checking		None	J	T					
4. Optum Bank HSA Savings	A	Interest	J	T					
5. Pioneer Bank Checking	A	Dividend	K	T					
6. Artesia Credit Union Savings	A	Interest	K	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)	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.									
13. Schwab Money Market Accoun[redacted]	A	Interest	J	T					
14. Schwab Money Market Account[redacted]	A	Interest	M	T					
15. Edward D. Jones Cash Account[redacted]	A	Interest	K	T					
16.									
17. AAPL		None	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

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
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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
T =Cash Market
U =Book Value
V =Other
W =Estimated

Name of Person Reporting	Date of Report
Carson, Joel M.	08/19/2025

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. T		None	J	T					
19. WBD		None	J	T					
20. COP	B	Dividend	K	T					
21. GSK		None	J	T					
22. HLN		None	J	T					
23. PNOPX	A	Dividend	J	T					
24. WFC	A	Dividend	J	T					
25. Artesia Special Hospital District GO Bond	A	Interest			Matured	08/01/24	J		
26.									
27. ASH	A	Dividend	J	T	Buy	11/07/24	J		
28. AVNT	A	Dividend	J	T	Buy	11/07/24	J		
29. XOM	B	Dividend	K	T					
30. DINO	A	Dividend	K	T					
31. NLY	B	Dividend	J	T					
32.					Sold (part)	03/05/24	J		
33. GTE		None			Sold	03/05/24	J		
34. OKE	A	Dividend	J	T					

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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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35. PLTR		None			Sold	03/05/24	J		
36. GNL***	A	Distribution	J	T	Open	09/13/23	J		
37. RTL***	A	Dividend			Merged (with line 36)	09/13/23	J		
38.									
39. Schwab Money Market Account (K1)	A	Interest	M	T					
40. Fidelity Freedom Index 2035 - Premier Fund	A	Int./Div.	P1	T					
41.					Buy (add'l)	03/31/24	K		
42.					Buy (add'l)	06/30/24	K		
43.					Buy (add'l)	09/30/24	J		
44. TDOC		None	K	T					
45. GOOGL		None	K	T					
46. GILD	A	Dividend	J	T					
47. PTON		None	J	T					
48. RCL	A	Dividend	K	T					
49. COP	B	Dividend	L	T					
50. PSX	B	Dividend	K	T					
51. BABA	A	Dividend	K	T					

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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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52. BRC		None	J	T					
53. ILMN		None	J	T					
54. GRAL		None	J	T	Spinoff (from line 53)	06/24/24	J		
55. AMZN		None	M	T					
56. TMO	A	Dividend	L	T					
57. TGT	A	Dividend	J	T					
58. MCD	A	Dividend	J	T					
59. AMGN	A	Dividend	J	T					
60. WBA	A	Dividend	J	T					
61. AAL		None	J	T					
62. AAPL	B	Dividend	N	T					
63. COKE	B	Dividend	M	T					
64. JNJ	A	Dividend	K	T					
65. DIS		None	K	T					
66. HOMB	A	Dividend	J	T					
67. LUV	A	Dividend	J	T					
68. NTDOY	A	Dividend	J	T					

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69. AMC		None	J	T					
70. GME		None	J	T					
71. GE	A	Dividend	K	T					
72. GEHC		None	J	T	Spinoff (from line 71)	01/03/23	J		
73. GEV		None	J	T	Spinoff (from line 71)	04/02/24	J		
74. HOLX		None	J	T					
75.									
76. Scholars Edge Today Portfolio A (1)		None	K	T					
77. Scholars Edge Today Portfolio A (2)		None	K	T					
78.									
79. ACGYX***					Sold	07/12/22	K		
80. AVALX	A	Dividend			Sold	08/07/24	K	A	
81. BHYIX	A	Dividend	J	T	Buy (add'l)	01/22/24	J		
82. FBGRX	A	Distribution	K	T	Buy (add'l)	01/19/24	J		
83. FDUXX (cash account)	A	Interest	J	T					
84. FEMKX	A	Dividend							
85.					Sold (part)	01/19/24	J		

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86.					Sold	01/22/24	J		
87. FCPIX	A	Dividend			Buy	01/22/24	K		
88.					Merged (with line 89)	07/10/24	K		
89. FIDZX	A	Dividend	K	T	Open	07/10/24	K		
90. FOCPX	A	Dividend	K	T	Sold (part)	01/22/24	K	A	
91. FTRBX	A	Dividend							
92.					Sold (part)	01/22/24	J		
93.					Sold	05/03/24	K		
94. GIBIX	A	Dividend	J	T	Buy	08/07/24	J		
95. GILHX	A	Dividend			Sold (part)	01/23/24	J	A	
96.					Sold	08/07/24	J		
97. GQEIX	A	Dividend	K	T	Buy	08/07/24	K		
98. GSMIX	A	Dividend	K	T	Buy	01/23/24	K		
99. HDGYX		None			Sold	08/07/24	K	C	
100. LSIIX	B	Dividend	K	T					
101.					Sold (part)	01/22/24	J		
102. MDIJX	A	Dividend							

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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103.					Sold	01/23/24	J		
104. NEJYX	A	Dividend	K	T	Buy	08/07/24	K		
105. OAYMX	A	Dividend	J	T	Buy (add'l)	01/22/24	J		
106. ODIYX		None	K	T					
107.					Sold (part)	01/22/24	J		
108. PEIYX	A	Dividend	K	T	Buy	08/07/24	K		
109. PFORX	A	Dividend	K	T	Buy	05/03/24	K		
110.					Buy (add'l)	08/07/24	J		
111. PIMIX	B	Dividend	K	T	Buy (add'l)	01/22/24	J		
112.					Sold (part)	01/22/24	J	A	
113. PIREX	A	Distribution	J	T	Buy	01/22/24	J		
114. PRBLX	A	Dividend							
115.					Sold	08/07/24	K	A	
116. SICWX	A	Dividend	K	T					
117. VENAX***					Sold	11/08/23	J	A	
118. VLMIX	A	Dividend	K	T					
119. UIITX	B	Dividend	K	T					

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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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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.					Buy (add'l)	05/03/24	J		
121.					Sold (part)	08/07/24	J	A	
122. WFMIX	A	Dividend	K	T					
123. WIGRX		None	J	T	Buy	01/30/24	J		
124.									
125. Schwab Money Market (JC1)	A	Interest	J	T					
126. KNX	A	Dividend	J	T					
127. BP	A	Dividend	J	T					
128. VOOG	A	Dividend	J	T					
129. Schwab Money Market (C1)	A	Interest	J	T					
130. CSX	A	Dividend	J	T					
131. HOMB	A	Dividend	J	T					
132. MTDR(X)	A	Distribution	J	T					
133. VOOG	A	Dividend	K	T	Buy (add'l)	02/02/24	J		
134.									
135. Family Estate No. 1 (@-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
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Name of Person Reporting	Date of Report
Carson, Joel M.	08/19/2025

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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137. -First National Bank Checking(Y)									
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					
152. -ESV(Y)									
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
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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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154. -GSK	A	Dividend	J	T					
155. -HLN		None	J	T					
156. -HOMB	A	Dividend	J	T					
157. -ITW	A	Dividend	J	T					
158. -JNJ	A	Dividend	J	T					
159. -JPM	A	Dividend	J	T					
160. -LOW	A	Dividend	K	T					
161. -MCHP	A	Dividend	J	T					
162. -MGM	A	Dividend	J	T					
163. -NCLH		None	J	T					
164. -PFE	A	Dividend	J	T					
165. -RIG		None	J	T					
166. -SHO	A	Dividend	J	T					
167. -SLB	A	Dividend	J	T					
168. -TUP		None	J	T					
169. -WBD		None	J	T					
170. -WFC	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
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171. -XEL	A	Dividend	J	T					
172.									
173. -AVALX	A	Dividend							
174.					Sold	08/07/24	J	A	
175. -BHYIX	A	Dividend	K	T					
176.					Sold (part)	01/22/24	J		
177.					Sold (part)	08/07/24	J		
178. -FBGRX	B	Dividend	J	T					
179.					Buy (add'l)	01/19/24	J		
180. -FCPIX(changed in July to FIDZX)	A	Dividend			Buy	01/22/24	K		
181.					Merged (with line 182)	07/10/24	K		
182. FIDZX	A	Dividend	K	T	Open	07/10/24	K		
183. -FEMKX	A	Dividend			Sold	01/22/24	J		
184. -FOCPX	B	Dividend	K	T					
185.					Sold (part)	01/19/24	J		
186.					Sold (part)	01/22/24	J		
187. -FTRBX	A	Dividend							

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188.					Sold (part)	01/22/24	J		
189.					Sold	05/03/24	K		
190. -GIBIX	A	Dividend	K	T	Buy	08/07/24	K		
191. -GILHX	A	Dividend							
192.					Sold (part)	01/23/24	J		
193.					Sold	08/07/24	K	A	
194. -GQEIX	A	Dividend	J	T	Buy	08/07/24	J		
195. -GSIMX	A	Dividend	K	T	Buy	01/23/24	K		
196. -HDGIX	A	Dividend							
197.					Sold	08/07/24	K	C	
198. -LSIIX	B	Dividend	L	T					
199.					Sold (part)	1/22/24	J		
200. -MDIJX	A	Dividend	K	T					
201.					Sold (part)	01/23/24	K		
202. -NEJYX	A	Dividend	J	T	Buy	08/07/24	J		
203. -OAYMX	A	Dividend	J	T					
204.					Buy	01/22/24	J		

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205. -ODIYX	A	Dividend	J	T					
206.					Sold (part)	01/23/24	J		
207. -PEYIX	B	Distribution	K	T	Buy	08/07/24	K		
208. -PFORX	A	Dividend	K	T	Buy	05/03/24	K		
209.					Buy (add'l)	08/07/24	J		
210. -PIREX	A	Dividend	K	T	Buy	01/22/24	J		
211. -PONPX	B	Dividend	K	T					
212.					Sold (part)	01/22/24	J		
213. -PRBLX	A	Dividend							
214.					Sold	08/07/24	J	A	
215. -QPRMQ (cash account)	A	Interest	J	T					
216. -SICWX	A	Dividend	J	T					
217. -UIITX	A	Dividend	K	T					
218.					Buy (add'l)	01/22/24	J		
219.					Buy (add'l)	05/03/24	J		
220.					Sold (part)	08/07/24	J	A	
221. -VLMIX	A	Distribution	J	T					

1. Income Gain Codes: (See Columns B1 and D4)
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222. -WFMIX	A	Dividend	J	T					
223. -WIGRX	A	Dividend	J	T	Buy	01/22/24	J		
224.									

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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.

** Property identified during probate proceedings.

*** Holding previously divested as noted but mistakenly left on prior report.

@ Items listed at lines 136-139 relate to [redacted] estate.

Charles Schwab acquired TD Ameritrade so name of custodian changed from Ameritrade to Schwab.

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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/ 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. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544