AO 10
Rev. 3/2023

# FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

*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 |
|---|---|---|
| Ebel, David M. | Tenth Circuit Court of Appeals | 07/19/2024 |
| **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 (Senior) | ☐ Nomination Date<br>☐ Initial ☑ Annual ☐ Final<br>**5b.** ☑ Amended Report | 01/01/2022<br>**to**<br>12/31/2022 |
| **7. Chambers or Office Address** | | |
| Byron White U.S. Courthouse<br>1823 Stout Street<br>Room 109L<br>Denver, CO 80257 | | |

***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. | Executor | Estate #1 |
| 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. | 2022 | Pacific Life Insurance Company, residual annuity payment (received as beneficiary of Trust #1) | $36,718.65 |
| 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. | 2022 | Public Employees Retirement Association (PERA) -- retirement |
| 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 |
|---|---|
| **Ebel, David M.** | 07/19/2024 |

## 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. Northwestern Mutual Modified Whole Life Policies | E | Interest | M | T | | | | | |
| 2. Mass. Mutual Whole Life Policy | C | Interest | K | T | | | | | |
| 3. Thrivant Lutheran Brotherhood Whole Life Policy | B | Interest | K | T | | | | | |
| 4. Open Intelligence Software Group, Inc. Class A Common Stock | A | Dividend | J | U | | | | | |
| 5. IRA #1 (H) | | | | | | | | | |
| 6. - Janus Henderson Money Market Fund D Shares | B | Dividend | M | T | Buy (add'l) | 02/17/22 | L | | |
| 7. | | | | | Sold (part) | 03/23/22 | M | | |
| 8. | | | | | Buy (add'l) | 04/06/22 | M | | |
| 9. | | | | | Sold (part) | 05/27/22 | L | | |
| 10. | | | | | Buy (add'l) | 12/05/22 | L | | |
| 11. - Janus Henderson Global Teck & Innovation D Shares | | None | J | T | Sold (part) | 02/17/22 | K | C | |
| 12. | | | | | Buy (add'l) | 03/23/22 | K | | |
| 13. | | | | | Sold (part) | 04/06/22 | K | | |
| 14. | | | | | Buy (add'l) | 05/27/22 | J | | |
| 15. | | | | | Sold (part) | 12/05/22 | J | | |
| 16. - Janus Henderson Forty Fund D Shares | A | Dividend | K | T | Sold (part) | 02/17/22 | K | C | |
| 17. | | | | | Buy (add'l) | 03/23/22 | K | | |

| | | | | | |
|---|---|---|---|---|---|
| 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. | | | | | Sold (part) | 04/06/22 | K | C | |
| 19. | | | | | Buy (add'l) | 05/27/22 | K | | |
| 20. | | | | | Sold (part) | 12/05/22 | K | | |
| 21. - Janus Henderson Enterprise Fund D Shares | A | Dividend | J | T | Buy (add'l) | 03/23/22 | K | | |
| 22. | | | | | Sold (part) | 04/06/22 | K | | |
| 23. | | | | | Buy (add'l) | 05/27/22 | J | | |
| 24. | | | | | Sold (part) | 12/05/22 | J | | |
| 25. - Janus Henderson Global Real Estate Fund D Shares | A | Dividend | J | T | Buy (add'l) | 03/23/22 | K | | |
| 26. | | | | | Buy (add'l) | 05/27/22 | K | | |
| 27. | | | | | Sold (part) | 12/05/22 | K | | |
| 28. Brokerage #1 (H) | | | | | | | | | |
| 29. - Fidelity Core Cash Management Account | A | Interest | L | T | | | | | |
| 30. - Apple Inc | A | Dividend | | | Sold | 12/09/22 | J | B | |
| 31. - Select Sector SPDR Trust Technology | | Dividend | | | Sold (part) | 01/25/22 | J | C | |
| 32. | | | | | Sold | 05/26/22 | J | A | |
| 33. - Lithium Americas Corp | | None | | | Sold (part) | 01/10/22 | J | A | |
| 34. | | | | | Buy (add'l) | 01/14/22 | J | | |

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|---|---|---|---|---|---|---|---|---|---|
| 35. | | | | | Sold (part) | 02/04/22 | J | | |
| 36. | | | | | Buy (add'l) | 03/21/22 | J | | |
| 37. | | | | | Sold | 10/31/22 | J | | |
| 38. - ETF Ser Solutions Defiance Next | A | Dividend | | | Sold (part) | 01/21/22 | K | C | |
| 39. | | | | | Sold | 04/27/22 | J | A | |
| 40. - Vanguard Mega Cap Index Fund | | None | | | Sold (part) | 01/26/22 | K | D | |
| 41. | | | | | Buy (add'l) | 02/02/22 | K | | |
| 42. | | | | | Sold | 02/15/22 | K | A | |
| 43. - Fidelity MSCI Consumer Discretionary Index ETF | A | Dividend | | | Sold (part) | 01/20/22 | K | D | |
| 44. | | | | | Buy (add'l) | 03/31/22 | K | | |
| 45. | | | | | Sold (part) | 04/08/22 | K | | |
| 46. | | | | | Sold | 05/04/22 | J | A | |
| 47. - Vanguard Index Funds S&P 500 ETF | A | Dividend | | | Sold (part) | 01/25/22 | K | B | |
| 48. | | | | | Sold | 05/04/22 | J | A | |
| 49. - Morgan Stanley Com | A | Dividend | | | Sold | 04/27/22 | J | A | |
| 50. - Alphabet Inc | | None | J | T | Sold | 01/26/22 | J | B | |
| 51. | | | | | Buy | 02/07/22 | K | | |

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|---|---|---|---|---|---|---|---|---|---|
| 52. - Novavax Inc Com New | | None | K | T | Buy (add'l) | 01/11/22 | K | | |
| 53. | | | | | Sold (part) | 09/12/22 | J | | |
| 54. - Fidelity MSCI Health Care Index | A | Dividend | | | Sold | 04/29/22 | J | | |
| 55. - Invesco Exchange Traded Fd Tr S&P500 Eql HLT | | None | | | Sold (part) | 01/20/22 | J | A | |
| 56. | | | | | Sold | 04/06/22 | J | A | |
| 57. - Invesco Exchange Traded Fd Tr S&P500 Eql MAT | A | Dividend | | | Buy | 02/03/22 | J | | |
| 58. | | | | | Sold | 02/15/22 | K | | |
| 59. - Invesco Exchange Traded Fd Tr S&P500 Eql Wgt | | None | | | Sold | 01/12/22 | K | A | |
| 60. - Perkinelmer Inc | | None | | | Sold | 01/06/22 | K | C | |
| 61. - Gilat Satelite Networks Ordilso | | None | | | Sold (part) | 01/26/22 | J | | |
| 62. | | | | | Sold | 08/18/22 | J | | |
| 63. - Ford Motor Co | A | Dividend | | | Sold (part) | 01/21/22 | J | A | |
| 64. | | | | | Sold | 04/06/22 | J | | |
| 65. - Stem Inc Com | | None | J | T | | | | | |
| 66. - Fidelity Value Factor ETF | A | Dividend | | | Sold (part) | 01/21/22 | K | A | |
| 67. | | | | | Sold | 04/27/22 | J | | |
| 68. - ESS Tech Inc | | None | J | T | | | | | |

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|---|---|---|---|---|---|---|---|---|---|
| 69. - Oramed Pharmaceuticals Inc Com | | None | | | Sold | 02/28/22 | J | | |
| 70. - Fluence Energy Inc | | None | J | T | | | | | |
| 71. - First Tr Exchange-Traded Fd NAS Clnedg Green | | None | | | Sold | 01/12/22 | J | | |
| 72. - Aurora Innovation Inc | | None | J | T | | | | | |
| 73. - Abbvie Inc | A | Dividend | K | T | | | | | |
| 74. - Ishares Tr Semiconductor | | None | | | Sold | 01/21/22 | K | | |
| 75. - Freeport McMoran Inc | A | Dividend | | | Buy (add'l) | 02/18/22 | J | | |
| 76. | | | | | Sold | 06/22/22 | J | | |
| 77. - Ilika PLC | | None | | | Sold | 12/28/22 | J | | |
| 78. - Glazosmithkline ADR Rep Two Ord | | None | | | Sold (part) | 01/21/22 | J | A | |
| 79. | | | | | Buy | 01/25/22 | J | | |
| 80. | | | | | Sold | 05/04/22 | J | A | |
| 81. - AT & T Inc | A | Dividend | | | Sold (part) | 02/03/22 | K | B | |
| 82. | | | | | Sold | 02/04/22 | J | | |
| 83. - Solid Power Inc | | None | J | T | | | | | |
| 84. - Homestreet Inc. | A | Dividend | | | Sold (part) | 01/21/22 | J | A | |
| 85. | | | | | Sold | 05/26/22 | J | | |

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|---|---|---|---|---|---|---|---|---|---|
| 86. - Open Door Technologies Inc | | None | | | Buy | 02/14/22 | J | | |
| 87. | | | | | Sold | 02/25/22 | J | | |
| 88. | | | | | Buy | 03/01/22 | J | | |
| 89. | | | | | Sold | 09/06/22 | J | | |
| 90. - Upstart Hldgs Inc Com | | None | | | Buy | 02/22/22 | J | | |
| 91. | | | | | Sold | 10/25/22 | J | | |
| 92. - Select Sector SPDR TR Financial | A | Dividend | J | T | Buy | 01/06/22 | J | | |
| 93. | | | | | Sold (part) | 01/25/22 | J | | |
| 94. | | | | | Buy (add'l) | 02/14/22 | J | | |
| 95. | | | | | Sold | 03/03/22 | J | | |
| 96. | | | | | Buy | 03/29/22 | J | | |
| 97. - Exxon Mobil Corp | | None | | | Buy | 03/09/22 | K | | |
| 98. | | | | | Sold | 04/27/22 | K | | |
| 99. - Block Inc | | None | | | Buy | 03/02/22 | J | | |
| 100. | | | | | Sold | 03/07/22 | J | | |
| 101. - Crowdstrike Hldgs Inc | | None | | | Buy | 03/03/22 | J | | |
| 102. | | | | | Sold | 03/09/22 | J | | |

| | | | | | |
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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 | |
| | 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 |
|---|---|
| **Ebel, David M.** | 07/19/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 103. | | | | | Buy | 03/15/22 | J | | |
| 104. | | | | | Sold | 05/04/22 | J | A | |
| 105. - Qualcomm Inc | | None | | | Buy | 01/07/22 | K | | |
| 106. | | | | | Sold | 01/11/22 | K | | |
| 107. - Select Sector SPDR Tr Rl Est Sel Sec | | None | | | Buy | 01/07/22 | K | | |
| 108. | | | | | Sold | 02/15/22 | J | | |
| 109. - Alliancebernstein Holding LP | D | Dividend | | | Buy | 01/12/22 | J | | |
| 110. | | | | | Buy (add'l) | 03/22/22 | J | | |
| 111. | | | | | Sold | 07/26/22 | K | | |
| 112. - Fidelity MSCI Consumer Staples Index ETF | A | Dividend | | | Buy | 01/21/22 | J | | |
| 113. | | | | | Buy (add'l) | 01/25/22 | J | | |
| 114. | | | | | Sold | 05/04/22 | J | A | |
| 115. - NEO Lithium Corp New Com NPV | | None | | | Buy | 01/27/22 | J | | |
| 116. | | | | | Sold | 02/01/22 | J | | |
| 117. - Moderna Inc Com | | None | | | Buy | 02/02/22 | J | | |
| 118. | | | | | Sold | 02/18/22 | J | | |
| 119. - Advanced Micro Devices Inc | | None | | | Buy | 02/03/22 | K | | |

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 |
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| **Ebel, David M.** | 07/19/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 120. | | | | | Sold | 08/05/22 | K | | |
| 121. - Materials Select Sector SPDR | A | Dividend | | | Buy | 02/04/22 | J | | |
| 122. | | | | | Sold | 04/08/22 | J | A | |
| 123. - META Platformd Inc Class A | | None | | | Buy | 02/07/22 | K | | |
| 124. | | | | | Sold (part) | 02/18/22 | J | | |
| 125. | | | | | Sold | 05/26/22 | J | | |
| 126. - Amazon.com Inc | | None | | | Buy | 02/08/22 | K | | |
| 127. | | | | | Sold | 02/18/22 | K | A | |
| 128. - Snowflake Inc CL A | | None | | | Buy | 02/09/22 | J | | |
| 129. | | | | | Sold | 09/26/22 | J | | |
| 130. - Ishares TR GL Clean Ene ETF | A | Dividend | J | T | Buy | 02/11/22 | J | | |
| 131. | | | | | Sold | 02/18/22 | J | | |
| 132. | | | | | Buy | 08/04/22 | J | | |
| 133. - ARQIT Quantum Inc Com | | None | | | Buy | 02/14/22 | J | | |
| 134. | | | | | Buy (add'l) | 03/07/22 | J | | |
| 135. | | | | | Sold | 05/04/22 | J | | |
| 136. - Novnix Ltd Npv | | None | | | Buy | 02/03/22 | 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 | |
| | P3 =$25,000,001 - $50,000,000 | | P4 =More than $50,000,000 | | |
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| Name of Person Reporting | Date of Report |
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| **Ebel, David M.** | 07/19/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 137. | | | | | Sold | 02/28/22 | J | | |
| 138. - Equinor ASA Spon ADR | A | Dividend | | | Buy | 02/15/22 | J | | |
| 139. | | | | | Sold (part) | 07/06/22 | J | A | |
| 140. | | | | | Buy (add'l) | 08/30/22 | J | | |
| 141. | | | | | Sold | 10/26/22 | J | B | |
| 142. - Pepsico Inc | A | Dividend | | | Buy | 02/23/22 | K | | |
| 143. | | | | | Sold | 03/25/22 | K | | |
| 144. - Global X FDS Cybrscurty ETF | | None | | | Buy | 02/28/22 | J | | |
| 145. | | | | | Sold | 05/06/22 | J | | |
| 146. - United Sts Brent Oil FD LP Unit | A | Dividend | | | Buy | 02/28/22 | J | | |
| 147. | | | | | Sold | 03/07/22 | J | A | |
| 148. - Target Corp | A | Dividend | | | Buy | 03/03/22 | J | | |
| 149. | | | | | Sold | 07/26/22 | J | | |
| 150. - ICL Group Ltd ILS1 | | None | | | Buy | 03/04/22 | J | | |
| 151. | | | | | Sold | 03/31/22 | J | A | |
| 152. - Mosaic Co New Com | A | Dividend | | | Buy | 03/09/22 | J | | |
| 153. | | | | | Sold | 06/22/22 | 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 | |
| | P3 =$25,000,001 - $50,000,000 | | P4 =More than $50,000,000 | | |
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| **Ebel, David M.** | 07/19/2024 |

## 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.)*

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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) | |
|---|---|---|---|---|---|---|---|---|---|
| 154. - Public Storage Com | A | Dividend | | | Buy | 03/11/22 | J | | |
| 155. | | | | | Sold | 09/14/22 | J | | |
| 156. - Glencore Plc Unsponsord Adr | A | Dividend | | | Buy | 03/14/22 | J | | |
| 157. | | | | | Sold | 04/06/22 | J | A | |
| 158. | | | | | Buy | 04/14/22 | J | | |
| 159. | | | | | Sold | 05/05/22 | J | | |
| 160. - Okta Inc CL A | | None | | | Buy | 03/15/22 | J | | |
| 161. | | | | | Sold | 03/28/22 | J | | |
| 162. - Canadian Natural Resources LTD | A | Dividend | | | Buy | 03/08/22 | J | | |
| 163. | | | | | Buy (add'l) | 04/06/22 | J | | |
| 164. | | | | | Buy (add'l) | 04/11/22 | J | | |
| 165. | | | | | Sold | 06/22/22 | K | | |
| 166. - Starr Peak Mining LTD Com Npv | | None | | | Buy | 03/21/22 | J | | |
| 167. | | | | | Sold | 03/31/22 | J | | |
| 168. - Tesla Inc Com | | None | | | Buy | 03/22/22 | K | | |
| 169. | | | | | Sold | 04/08/22 | K | C | |
| 170. - Consumer Discretionary Select SPDR Fund | A | Dividend | | | Buy | 03/24/22 | 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 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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|---|---|---|---|---|---|---|---|---|---|
| 171. | | | | | Sold | 08/19/22 | J | | |
| 172. - Intel Corp Com | | None | | | Buy | 03/25/22 | J | | |
| 173. | | | | | Sold | 05/06/22 | J | | |
| 174. - Sentinelone Inc CL A | | None | | | Buy | 03/25/22 | J | | |
| 175. | | | | | Sold (part) | 03/31/22 | J | | |
| 176. | | | | | Sold | 04/13/22 | J | | |
| 177. - Nutrien LTD Com NPV ISIN | | None | | | Buy | 05/04/22 | J | | |
| 178. | | | | | Sold | 06/22/22 | J | | |
| 179. - Archer-Daniels-Midla ND CO | A | Dividend | | | Buy | 05/06/22 | J | | |
| 180. | | | | | Sold | 07/08/22 | J | | |
| 181. - Ishares Tr Us Oil GS Ex ETF | A | Dividend | | | Buy | 05/11/22 | K | | |
| 182. | | | | | Sold | 06/17/22 | K | A | |
| 183. - Enphase Energy Inc Com | | None | | | Buy | 06/01/22 | J | | |
| 184. | | | | | Sold | 06/16/22 | J | | |
| 185. - Ioneer Ltd Ord Isin | | None | | | Buy | 07/25/22 | J | | |
| 186. | | | | | Buy (add'l) | 08/30/22 | J | | |
| 187. | | | | | Sold | 11/17/22 | 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 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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|---|---|---|---|---|---|---|---|---|---|
| 188. - Aeva Technologies Inc | | None | J | T | Buy | 08/10/22 | J | | |
| 189. - Super Micro Computer Inc Com | | None | J | T | Buy | 08/19/22 | J | | |
| 190. | | | | | Buy (add'l) | 08/31/22 | J | | |
| 191. - Ark Etf Tr Autnmus Technlgy | | None | | | Buy | 08/10/22 | K | | |
| 192. | | | | | Sold | 08/30/22 | K | | |
| 193. - Ast Spacemobile Inc Com Cl A | | None | | | Buy | 08/18/22 | J | | |
| 194. | | | | | Buy (add'l) | 08/31/22 | J | | |
| 195. | | | | | Sold | 10/26/22 | J | | |
| 196. - Vipshop Hldgs Ltd Spon Ads Ea Repr | | None | | | Buy | 09/06/22 | J | | |
| 197. | | | | | Sold | 10/25/22 | J | | |
| 198. - Hudson Technologies Inc | | None | | | Buy | 09/20/22 | J | | |
| 199. | | | | | Sold | 10/11/22 | J | | |
| 200. - Select Sector SPDR Tr Energy | A | Dividend | K | T | Buy | 10/07/22 | K | | |
| 201. | | | | | Buy (add'l) | 10/31/22 | K | | |
| 202. - Chevron Corp New Com | A | Dividend | K | T | Buy | 10/11/22 | K | | |
| 203. - Devon Energy Corp New | A | Dividend | J | T | Buy | 10/12/22 | J | | |
| 204. - Livent Corp Com | | None | J | T | Buy | 11/03/22 | 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 | |
| | P3 =$25,000,001 - $50,000,000 | | P4 =More than $50,000,000 | | |
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| Name of Person Reporting | Date of Report |
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|---|---|---|---|---|---|---|---|---|---|
| 205. - Marathon Petroleum Corp Com | A | Dividend | K | T | Buy | 11/07/22 | J | | |
| 206. | | | | | Buy (add'l) | 11/10/22 | J | | |
| 207. - Valero Energy Corp Com | A | Dividend | K | T | Buy | 11/07/22 | K | | |
| 208. | | | | | Buy (add'l) | 11/10/22 | J | | |
| 209. - Investco Exchange Trade Tr Fd Winderhil Clan | | None | | | Buy | 02/11/22 | J | | |
| 210. | | | | | Sold | 03/17/22 | J | | |
| 211. IRA #2 (H) | | | | | | | | | |
| 212. - FDIC Insured Deposit at US Bank | A | Interest | J | T | | | | | |
| 213. - ALPS ETF Tr Clean Energy | A | Dividend | K | T | Sold | 01/06/22 | K | B | |
| 214. | | | | | Buy | 08/10/22 | K | | |
| 215. | | | | | Buy (add'l) | 08/15/22 | K | | |
| 216. | | | | | Sold (part) | 11/09/22 | K | | |
| 217. - Nvidia Corp | A | Dividend | | | Sold (part) | 01/25/22 | K | E | |
| 218. | | | | | Buy (add'l) | 02/03/22 | K | | |
| 219. | | | | | Buy (add'l) | 02/16/22 | K | | |
| 220. | | | | | Sold (part) | 08/10/22 | K | | |
| 221. | | | | | Sold | 09/14/22 | 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 | |
| | 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 |
|---|---|
| **Ebel, David M.** | 07/19/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 222. - Microsoft Corp | A | Dividend | | | Sold (part) | 04/08/22 | L | E | |
| 223. | | | | | Sold | 12/01/22 | K | | |
| 224. - Fidelity MSCI Information Technology Index ETF | | None | | | Sold | 02/15/22 | L | D | |
| 225. - Morgan Stanley Discovery Portfolio Cl A | | None | | | Sold | 01/05/22 | K | E | |
| 226. - FDIC Insured Deposit at Huntington Bank | A | Interest | K | T | | | | | |
| 227. - Texas Instruments Inc | | None | | | Sold | 01/06/22 | K | B | |
| 228. - Skyline Champions Corp | | None | | | Sold | 01/26/22 | K | | |
| 229. - Apple Inc | A | Dividend | L | T | | | | | |
| 230. - Arcbest Corp Com | A | Dividend | | | Sold (part) | 01/26/22 | K | | |
| 231. | | | | | Sold | 04/08/22 | K | | |
| 232. - Pfizer Inc | A | Dividend | | | Sold | 02/17/22 | K | | |
| 233. - Fidelity Dividend ETF for Rising Rates | A | Dividend | | | Sold | 04/08/22 | K | | |
| 234. - Vanguard Financials ETF | A | Dividend | K | T | | | | | |
| 235. - ARK ETF Tr Innovation ETF | | None | | | Buy | 01/03/22 | K | | |
| 236. | | | | | Sold (part) | 01/26/22 | J | | |
| 237. | | | | | Buy (add'l) | 02/16/22 | K | | |
| 238. | | | | | Buy (add'l) | 03/22/22 | K | | |

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

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 239. | | | | | Sold | 04/08/22 | L | | |
| 240. - ARK ETF Tr Genomic Rev ETF | | None | | | Buy | 01/03/22 | K | | |
| 241. | | | | | Sold (part) | 01/26/22 | J | | |
| 242. | | | | | Buy (add'l) | 03/22/22 | J | | |
| 243. | | | | | Sold | 04/08/22 | J | | |
| 244. - Alaska Air Group Inc Com | | None | | | Buy | 01/06/22 | J | | |
| 245. | | | | | Sold | 04/06/22 | J | A | |
| 246. - Select Sector SPRD Tr Energy | A | Dividend | | | Buy | 01/06/22 | K | | |
| 247. | | | | | Buy (add'l) | 03/21/22 | J | | |
| 248. | | | | | Sold | 06/22/22 | K | D | |
| 249. - Select Sector SPRD Tr Rl Est Sel | | None | | | Buy | 01/06/22 | K | | |
| 250. | | | | | Sold | 02/15/22 | K | | |
| 251. - Amazon.com | | None | | | Buy | 03/14/22 | K | | |
| 252. | | | | | Buy (add'l) | 06/08/22 | K | | |
| 253. | | | | | Sold | 11/07/22 | K | | |
| 254. - Tesla Inc Com | | None | | | Buy | 03/22/22 | K | | |
| 255. | | | | | Sold | 10/05/22 | K | | |

| | | | | | |
|---|---|---|---|---|---|
| 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 | |
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| Name of Person Reporting | Date of Report |
|---|---|
| **Ebel, David M.** | 07/19/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 256. - On Semiconductor Corp Com | | None | | | Buy | 03/31/22 | K | | |
| 257. | | | | | Sold | 04/08/22 | K | | |
| 258. - Methanex Corp Com ISIN | A | Dividend | | | Buy | 05/09/22 | K | | |
| 259. | | | | | Sold | 08/03/22 | K | | |
| 260. - Lockheed Martin Corp Com | A | Dividend | K | T | Buy | 07/06/22 | K | | |
| 261. - ARK ETF Tr Autnmus Technlgy | | None | K | T | Buy | 08/10/22 | K | | |
| 262. | | | | | Buy (add'l) | 08/15/22 | K | | |
| 263. - Exxon Mobil | A | Dividend | L | T | Buy | 09/26/22 | K | | |
| 264. | | | | | Buy (add'l) | 11/07/22 | K | | |
| 265. | | | | | Buy (add'l) | 11/10/22 | K | | |
| 266. - UNUM Group | A | Dividend | K | T | Buy | 10/11/22 | K | | |
| 267. | | | | | Sold (part) | 11/15/22 | K | | |
| 268. - Valero Energy Corp Com | A | Dividend | K | T | Buy | 11/10/22 | K | | |
| 269. - Marathon Oil Corp Com | A | Dividend | K | T | Buy | 11/16/22 | K | | |
| 270. - FDIC Insured Deposit Acct at Truist Bank | A | Interest | K | T | Open | 04/08/22 | K | | |
| 271. - FDIC Insured Deposit Acct at Citizens Bank | A | Interest | K | T | Open | 04/08/22 | K | | |
| 272. IRA #3 (H) | | | | | | | | | |

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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| Name of Person Reporting | Date of Report |
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| **Ebel, David M.** | 07/19/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 273. - Dodge & Cox Stock Fd. | C | Dividend | L | T | Sold (part) | 02/17/22 | L | E | |
| 274. | | | | | Buy (add'l) | 03/23/22 | K | | |
| 275. | | | | | Sold (part) | 04/06/22 | L | E | |
| 276. | | | | | Buy (add'l) | 05/27/22 | K | | |
| 277. - Dodge & Cox Balanced Fd. | C | Dividend | K | T | Buy (add'l) | 03/23/22 | K | | |
| 278. | | | | | Buy (add'l) | 04/06/22 | L | | |
| 279. | | | | | Sold (part) | 05/27/22 | L | | |
| 280. - Dodge & Cox Income Fund | A | Dividend | J | T | Buy (add'l) | 02/17/22 | L | | |
| 281. | | | | | Sold (part) | 03/23/22 | L | | |
| 282. | | | | | Sold (part) | 04/06/22 | J | | |
| 283. - Dodge & Cox Global Stock Fund | C | Dividend | L | T | Buy (add'l) | 03/23/22 | K | | |
| 284. | | | | | Buy (add'l) | 05/27/22 | K | | |
| 285. IRA #4 (H) | | | | | | | | | |
| 286. - Fidelity MSCI Consumer Discretionary Index ETF | A | Dividend | | | Sold | 01/25/22 | K | D | |
| 287. | | | | | Buy | 03/31/22 | J | | |
| 288. | | | | | Sold | 08/19/22 | J | | |
| 289. - Vanguard Index Funds S&P 500 ETF | A | Dividend | K | T | Buy | 01/28/22 | K | | |

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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| **Ebel, David M.** | 07/19/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 290. - Fidelity Government Money Market Fund | A | Dividend | J | T | Buy | 01/25/22 | K | | |
| 291. | | | | | Sold (part) | 01/28/22 | K | | |
| 292. | | | | | Buy (add'l) | 03/29/22 | J | | |
| 293. | | | | | Sold (part) | 03/31/22 | J | | |
| 294. | | | | | Buy (add'l) | 08/19/22 | J | | |
| 295. Brokerage #2 (H) | | | | | | | | | |
| 296. - Fidelity MSCI Information | A | Dividend | J | T | | | | | |
| 297. - Fidelity NASDAQ Composite Index | A | Dividend | J | T | | | | | |
| 298. - Fidelity Core Cash Management Account | A | Interest | J | T | | | | | |
| 299. - ALPS ETF Tr Clean Energy | A | Dividend | J | T | | | | | |
| 300. - Apple Inc Com | A | Dividend | J | T | | | | | |
| 301. - Costco Wholesale Corp | A | Dividend | J | T | | | | | |
| 302. - Ishares Tr MSCI USA Mmentm | A | Dividend | J | T | | | | | |
| 303. - Nvidia Corp | A | Dividend | J | T | | | | | |
| 304. - Nike Inc | A | Dividend | J | T | | | | | |
| 305. - Ark ETF Tr Next Gnrtn Innov | | None | J | T | | | | | |
| 306. Brokerage #3 (H) | | | | | | | | | |

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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## 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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|---|---|---|---|---|---|---|---|---|---|
| 307. - Brightspire Cap Inc CL A (X) | | None | | | Sold | 07/27/22 | J | | |
| 308. - Destra Multi-Alternative FD (X) | A | Dividend | | | Sold | 07/27/22 | J | | |
| 309. - Apollo Diversified R Fund Class C (X) | | None | | | Sold | 08/09/22 | M | | |
| 310. - Ares Real Estate Income Trust (X) | A | Dividend | K | T | | | | | |
| 311. Brokerage #4 (H) | | | | | | | | | |
| 312. - Destra Multi-Alternative FD (X) | A | Dividend | | | Sold | 08/09/22 | J | | |
| 313. - Apollo Diversified Real Estate Fund Class C (X) | | None | | | Sold | 08/09/22 | K | | |
| 314. Brokerage #5 (H) | | | | | | | | | |
| 315. - Focused Intl Equity Fund-A (X) | | None | | | Sold | 12/23/22 | K | | |
| 316. Brokerage #6 (H) | | | | | | | | | |
| 317. - Schwab Value Adv Money Fund (X) | A | Dividend | | | Buy | 10/06/22 | N | | |
| 318. | | | | | Sold | 12/07/22 | N | | |
| 319. - SPDR Dow Jones REIT ETF (X) | | None | | | Sold | 07/15/22 | K | | |
| 320. - American Century CA Interm T-Fr Bd (X) | A | Dividend | | | Sold | 07/15/22 | K | A | |
| 321. - Schwab 1000 Index (X) | A | Dividend | | | Sold | 07/15/22 | M | | |
| 322. - T.Rowe Price Capital Appreciation (X) | | None | | | Sold | 07/15/22 | K | | |
| 323. Brokerage #7 (H) | | | | | | | | | |

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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| **Ebel, David M.** | 07/19/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 324. - Ishares Select Divided ETF (X) | | None | | | Sold | 07/15/22 | K | | |
| 325. - PJT Partners Inc (X) | | None | | | Sold | 07/14/22 | J | A | |
| 326. - Vanguard Mid Cap ETF (X) | | None | | | Sold | 07/14/22 | J | | |
| 327. Brokerage #8 (H) | | | | | | | | | |
| 328. - Invesco American Franchise (X) | | None | | | Sold | 07/14/22 | M | | |
| 329. - Alphabet Inc Cap Stk CL A (X) | | None | | | Sold | 07/14/22 | K | | |
| 330. - Amazon Com Inc (X) | | None | | | Sold | 07/14/22 | K | | |
| 331. - Capital Income Bldr CL A (X) | | None | | | Sold | 07/14/22 | L | | |
| 332. - Carrier Global Corp (X) | | None | | | Sold | 07/14/22 | J | | |
| 333. - Cisco Systems Inc (X) | A | Dividend | | | Sold | 07/14/22 | K | | |
| 334. - Federated Hermes Strategic Value Div Fund CL C (X) | | None | | | Sold | 07/14/22 | K | | |
| 335. - Franklin California Tax Free Income Fund Inc (X) | A | Dividend | | | Sold | 07/14/22 | K | | |
| 336. - Genl Dynamics Corp (X) | | None | | | Sold | 07/14/22 | K | | |
| 337. - Income Fund Amer Inc Class A (X) | | None | | | Sold | 07/14/22 | K | | |
| 338. - Johnson and Johnson (X) | | None | | | Sold | 07/14/22 | K | | |
| 339. - JPMorgan Chase and CO (X) | A | Dividend | | | Sold | 07/14/22 | K | | |
| 340. - Otis Worldwide Corp (X) | | None | | | Sold | 07/14/22 | 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 | |
| | 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 |
|---|---|
| **Ebel, David M.** | 07/19/2024 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 341. - Pepsico Incorporated (X) | | None | | | Sold | 07/14/22 | K | A | |
| 342. - Pfizer Incorporated (X) | | None | | | Sold | 07/14/22 | K | | |
| 343. - Proctor and Gamble Co (X) | | None | | | Sold | 07/14/22 | K | A | |
| 344. - Qualcomm Inc (X) | | None | | | Sold | 07/14/22 | L | C | |
| 345. - Raytheon Technologies Corp (X) | | None | | | Sold | 07/14/22 | K | | |
| 346. - Schlumberger LTD (X) | | None | | | Sold | 07/14/22 | J | | |
| 347. -Vanguard Mid Cap ETF (X) | | None | | | Sold | 07/14/22 | K | | |
| 348. - Viatris Inc Com (X) | | None | | | Sold | 07/14/22 | J | | |
| 349. Brokerage #9 (H) | | | | | | | | | |
| 350. - BNY Mellon US Mortgage Fund Inc (X) | A | Dividend | | | Sold | 10/14/22 | L | | |
| 351. Inventrust Properties Corp (X) | | None | | | Sold | 11/30/22 | J | | |
| 352. US Bank account (X) | A | Interest | L | T | | | | | |
| 353. US Bank account | A | Interest | M | T | Open | 06/13/22 | J | | |
| 354. Frisco Kids LLC, minority interest held in private company (X) | | None | | | Sold | 01/04/22 | L | E | |
| 355. Single family home, San Diego County, CA (X) | | None | | | Sold | 08/18/22 | P1 | | |

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 |
|---|---|
| **Ebel, David M.** | 07/19/2024 |

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

This report was prepared on my behalf by my accountant.

| Name of Person Reporting | Date of Report |
|---|---|
| **Ebel, David M.** | 07/19/2024 |

## 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/ David M. Ebel**

**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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