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
Henderson, Karen L.	US Circuit Court of Appeals, District of Columbia	01/31/2024
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**
Circuit Court Judge - Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
US Courthouse, Room 3118 333 Constituition Avenue, NW Washington, DC 20001		

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.		
2.		
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements.)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
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.		
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
Henderson, Karen L.	01/31/2024

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. Wells Fargo Checking Account		None	J	T					
2. Truist Checking Account		None	J	T					
3. First Citizens Checking/Savings Account		None	N	T					
4. First Citizens Marital Non-QTIP Trust									
5. **Federated Hermes Government Obligations Fund	D	Interest			Buy (add'l)	03/31/22	L		
6.					Sold (part)	03/31/22	L		
7.					Buy (add'l)	06/30/22	O		
8.					Sold (part)	06/30/22	O		
9.					Buy (add'l)	09/30/22	M		
10.					Sold (part)	09/30/22	M		
11.					Buy (add'l)	12/31/22	P2		
12.					Sold	12/31/22	P2	A	
13. **American Beacon Garcia Hamilton	E	Dividend			Sold (part)	06/08/22	K		
14.					Sold (part)	08/29/22	J		
15.					Sold (part)	08/30/22	J		
16.					Sold	10/11/22	O		
17. **Artisan International Small Mid-Fund	A	Dividend	K	T	Buy (add'l)	01/03/22	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

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
Henderson, Karen L.	01/31/2024

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)	
18.					Sold (part)	01/03/22	J	A	
19.					Buy (add'l)	06/08/22	J		
20.					Buy (add'l)	08/29/22	K		
21.					Buy (add'l)	08/30/22	J		
22.					Sold (part)	10/11/22	K		
23.					Buy (add'l)	12/28/22	K		
24.	**Ashmore Emerging Markets Active	A	Dividend	M	T	Buy (add'l)	01/12/22	L		
25.					Buy (add'l)	06/08/22	J		
26.					Buy (add'l)	08/29/22	K		
27.					Buy (add'l)	08/30/22	J		
28.					Sold (part)	10/11/22	L		
29.					Buy (add'l)	12/28/22	L		
30.	**Baird Intermediate Bond Fund Instl #70	D	Dividend			Sold (part)	06/08/22	L		
31.					Sold (part)	08/29/22	J		
32.					Sold (part)	08/30/22	J		
33.					Sold (part)	10/11/22	O		
34.					Sold (part)	10/12/22	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
Henderson, Karen L.	01/31/2024

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)	
35.					Sold	12/28/22	J		
36. **Ballie Gifford Emerging Markets	C	Dividend	L	T	Buy (add'l)	06/08/22	J		
37.					Buy (add'l)	08/29/22	K		
38.					Sold (part)	10/11/22	L		
39.					Buy (add'l)	12/28/22	L		
40. **Carillon Clarivest Capital		None			Sold	06/08/22	M		
41. **Columbia Select Large Cap Value		None			Sold	06/08/22	M	B	
42. **Diamond Hill Large Cap Fund		None			Sold	06/08/22	L		
43. ** Delaware Small Cap Growth Fund Inst		None	K	T	Buy	12/08/22	J		
44.					Buy (add'l)	12/28/22	K		
45.					Sold (part)	12/31/22	J	A	
46. **Federated Hermes Mdt Small Cap Core Fund	A	Dividend	K	T	Buy	12/07/22	J		
47.					Sold (part)	12/07/22	J	A	
48.					Buy (add'l)	12/28/22	K		
49. **Fidelity International Index Fund		None			Buy	10/11/22	L		
50.					Sold	12/28/22	L	D	
51. **Goldman Sachs Fin Sq Gov Fund	A	Interest	M	T	Buy	12/31/22	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
Henderson, Karen L.	01/31/2024

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)	
52.					Sold (part)	12/31/22	P1		
53. **Goldman Sachs Emerging Markets	B	Dividend	L	T	Buy (add'l)	08/29/22	K		
54.					Buy (add'l)	08/30/22	J		
55.					Sold (part)	10/11/22	L		
56.					Buy (add'l)	12/28/22	L		
57. **Invesco Small Cap Value Fund	A	Dividend	K	T	Buy	12/27/22	J		
58.					Buy (add'l)	12/27/22	J		
59.					Sold (part)	12/27/22	J	A	
60.					Sold (part)	12/27/22	J	A	
61.					Buy (add'l)	12/28/22	K		
62. **Ishares Core US Aggregate ETF	D	Dividend	P1	T	Buy	12/28/22	P1		
63. **Ishares MSCI EAFE Int.	C	Dividend	M	T	Buy	12/28/22			
64. **Ishares Russell 1000 ETF		None			Buy	10/12/22	O		
65.					Sold	12/28/22	O	E	
66. **Ishares Russell 2000 ETF	B	Dividend			Buy	06/09/22	K		
67.					Sold (part)	08/30/22	J		
68.					Buy (add'l)	08/31/22	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
Henderson, Karen L.	01/31/2024

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)	
69.					Sold (part)	10/11/22	L		
70.					Sold	12/28/22	M	D	
71. **Ishares Russell Mid-Cap ETF	C	Dividend			Buy (add'l)	06/09/22	K		
72.					Sold	08/30/22	O	G	
73. **Ishares Russell Mid-Cap Growth ETF	B	Dividend	N	T	Buy	08/30/22	N		
74.					Buy (add'l)	08/31/22	J		
75.					Buy (add'l)	10/12/22	N		
76.					Sold (part)	10/12/22	J		
77.					Buy (add'l)	12/28/22	N		
78. **Ishares Russell Mid-Cap Value ETF	D	Dividend	N	T	Buy	08/30/22	N		
79.					Buy (add'l)	08/31/22	J		
80.					Sold (part)	10/12/22	N		
81.					Buy (add'l)	12/28/22	N		
82. **Ishares MSCI USA Min Vol Factor ETF	C	Dividend	N	T	Buy	08/30/22	N		
83.					Buy (add'l)	08/31/22	J		
84.					Sold (part)	10/12/22	N		
85.					Buy (add'l)	12/28/22	N		

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
Henderson, Karen L.	01/31/2024

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)	
86. **Ishares Russell Top 200 Growth ETF	D	Dividend	O	T	Buy (add'l)	01/13/22	M		
87.					Buy (add'l)	06/09/22	N		
88.					Sold (part)	08/30/22	O		
89.					Buy (add'l)	08/31/22	J		
90.					Sold (part)	10/12/22	O		
91.					Buy (add'l)	12/28/22	O		
92. **Ishares Russell Top 200 Value ETF	D	Dividend	N	T	Buy (add'l)	06/09/22	M		
93.					Sold (part)	08/30/22	M		
94.					Buy (add'l)	08/31/22	J		
95.					Sold (part)	10/12/22	N		
96.					Sold (part)	10/12/22	J		
97.					Buy (add'l)	12/28/22	N		
98. **Ishares S&P 500 Growth ETF		None			Buy	10/12/22	O		
99.					Sold	12/28/22	O	E	
100. **Ishares S&P 500 Value ETF		None			Buy	10/12/22	N		
101.					Sold	12/28/22	O	F	
102. **Ishares S&P Mid-Cap 400 Growth ETF		None			Buy	10/12/22	N		

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
Henderson, Karen L.	01/31/2024

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.					Sold	12/28/22	N	E	
104. **Ishares S&P Mid-Cap 400 Value		None			Buy	10/12/22	N		
105.					Sold	12/28/22	N	E	
106. **Ishares TR Core MSCI EAFE ETF	D	Dividend	M	T	Buy (add'l)	06/09/22	K		
107.					Buy (add'l)	08/30/22	J		
108.					Sold (part)	10/12/22	O		
109.					Buy (add'l)	12/28/22	M		
110. **Ishares MSCI Emerging Markets ETF		None			Buy	10/12/22	N		
111.					Sold	12/28/22	N	E	
112. **Ishares 7-10 Year Treasury Bond		None			Buy	10/12/22	P1		
113.					Sold	12/28/22	P1	E	
114. ** Johem International Select Fund	C	Dividend	M	T	Buy	12/02/22	M		
115. **JP Morgan Exchange Traded Fd US	B	Dividend	M	T	Buy	08/30/22	M		
116.					Buy (add'l)	08/31/22	J		
117.					Sold (part)	10/12/22	M		
118.					Sold (part)	10/12/22	J		
119.					Buy (add'l)	12/28/22	M		

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
Henderson, Karen L.	01/31/2024

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. **Mainstay Cbre Global Infrastructure Fund	A	Dividend			Sold (part)	06/08/22	J	A	
121.					Sold (part)	08/29/22	J	A	
122.					Buy (add'l)	08/30/22	J		
123.					Sold	11/18/22	J	A	
124. **Morgan Stanley Growth		None			Sold	06/08/22	L		
125. **Nuveen Global Infrastructure Fund Class 1	A	Dividend			Sold (part)	06/08/22	J	A	
126.					Sold (part)	08/29/22	J	A	
127.					Buy (add'l)	08/30/22	J		
128.					Buy (add'l)	10/17/22	J		
129.					Buy (add'l)	10/17/22	J		
130.					Sold (part)	10/17/22	J	A	
131.					Sold (part)	10/17/22	J	A	
132.					Sold	11/18/22	K		
133. ** Pear Tree Polaris Fgn Value Small Cap	C	Dividend	L	T	Buy (add'l)	06/08/22	J		
134.					Buy (add'l)	08/29/22	K		
135.					Buy (add'l)	08/30/22	J		
136.					Sold (part)	10/11/22	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
Henderson, Karen L.	01/31/2024

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.					Buy (add'l)	12/28/22	K		
138. ** Pear Tree Polaris Foreign Value Fund	D	Dividend	M	T	Buy	12/28/22	M		
139. **Proshares TR Dj Brookfield Global Inf. ETF	A	Dividend	K	T	Sold (part)	06/09/22	J	A	
140.					Sold (part)	08/30/22	J	A	
141.					Buy (add'l)	12/28/22	K		
142. ** T Rowe Price Inst. Large Cap		None			Sold	01/12/22	M		
143. **TIAA-CREF Emerging Markets Equity	C	Dividend	M	T	Buy (add'l)	08/29/22	K		
144.					Buy (add'l)	08/30/22	J		
145.					Sold (part)	10/12/22	M		
146.					Buy (add'l)	12/28/22	M		
147. **Vanguard Ftse Developed Markets ETF		None			Buy	10/12/22	O		
148.					Sold	12/28/22	O	F	
149. **Vanguard Equity Income Fund	A	Dividend			Sold	06/08/22	M	C	
150. **Vanguard Index Fds Vanguard		None			Buy	10/12/22	L		
151.					Sold	12/28/22	L	C	
152. **Vanguard Scottsdale Fds Vng	A	Dividend	L	T	Buy	12/28/22	L		
153. **Vanguard Short Term Bond Index	D	Dividend			Buy (add'l)	04/01/22	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
Henderson, Karen L.	01/31/2024

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)	
154.					Sold (part)	04/01/22	J	A	
155.					Sold (part)	06/08/22	L		
156.					Sold (part)	08/29/22	J		
157.					Sold (part)	08/30/22	J		
158.					Sold (part)	10/11/22	O		
159.					Sold	10/12/22	J		
160. First Citizens Marital QTIP Trust:									
161. **American Beacon Garcia Hamilton	C	Dividend			Sold (part)	06/08/22	J		
162.					Sold (part)	08/29/22	J		
163.					Sold (part)	08/30/22	J		
164.					Sold (part)	10/11/22	M		
165.					Sold	11/18/22	J		
166. **Artisan International Small-Mid Fund	A	Dividend	J	T	Buy (add'l)	01/03/22	J		
167.					Sold (part)	01/03/22	J	A	
168.					Buy (add'l)	06/08/22	J		
169.					Buy (add'l)	08/29/22	J		
170.					Buy (add'l)	08/30/22	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
Henderson, Karen L.	01/31/2024

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)	
171.					Buy (add'l)	11/18/22	J		
172.					Buy (add'l)	11/21/22	J		
173.					Sold (part)	10/11/22	J		
174. **Ashmore Emerging Markets Active	A	Dividend	K	T	Buy (add'l)	01/12/22	K		
175.					Buy (add'l)	08/29/22	J		
176.					Buy (add'l)	08/30/22	J		
177.					Sold (part)	10/11/22	K		
178.					Buy (add'l)	11/18/22	J		
179.					Buy (add'l)	11/22/22	K		
180. **Baird Intermediate Bond Fund Instl #70	C	Dividend			Sold (part)	06/08/22	J		
181.					Sold (part)	08/30/22	J		
182.					Sold (part)	10/11/22	M		
183.					Sold	11/18/22	J		
184. **Ballie Gifford Emerging Markets	B	Dividend	K	T	Buy (add'l)	06/08/22	J		
185.					Buy (add'l)	08/29/22	J		
186.					Buy (add'l)	08/30/22	J		
187.					Sold (part)	10/11/22	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
Henderson, Karen L.	01/31/2024

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)	
188.					Buy (add'l)	11/18/22	J		
189.					Buy (add'l)	11/21/22	J		
190. **Carillon Clarivest Capital Appreciation Fund		None			Sold	06/08/22	K		
191. **Delaware Small Cap Growth Fund		None	J	T	Buy	11/18/22	J		
192.					Buy (add'l)	11/21/22	J		
193.					Buy (add'l)	12/08/22	J		
194.					Sold (part)	12/08/22	J	A	
195. **Federated Hermes Gov't Oblg. Fund	A	Interest			Buy (add'l)	03/31/22	K		
196.					Sold (part)	03/31/22	K		
197.					Buy (add'l)	06/30/22	M		
198.					Sold (part)	06/30/22	M		
199.					Buy (add'l)	09/30/22	K		
200.					Sold (part)	09/30/22	K		
201.					Buy (add'l)	12/31/22	O		
202.					Sold (part)	12/31/22	O		
203. **Federated Hermes Mdt Small Cap Core	A	Dividend	J	T	Buy (add'l)	11/18/22	J		
204.					Buy (add'l)	11/21/22	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
Henderson, Karen L.	01/31/2024

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)	
205.					Buy (add'l)	12/07/22	J		
206.					Sold (part)	12/07/22	J	A	
207. **Goldman Sachs Fin Sq Gov Fund #465	A	Interest	M	T	Buy	12/31/22	M		
208.					Sold (part)	12/31/22	K		
209. **Goldman Sachs Emerging Markets Equity Insights	A	Dividend	K	T	Buy (add'l)	08/29/22	J		
210.					Sold (part)	10/11/22	J		
211.					Buy (add'l)	11/18/22	J		
212.					Buy (add'l)	11/21/22	J		
213. **Goldman Sachs International Small Cap Insights Fund		None			Sold	06/08/22	J		
214. **Invesco Small Cap Value	A	Dividend	J	T	Buy	11/18/22	J		
215.					Buy (add'l)	11/21/22	J		
216.					Sold (part)	12/27/22	J	A	
217.					Sold (part)	12/27/22	J	A	
218.					Buy (add'l)	12/27/22	J		
219.					Buy (add'l)	12/27/22	J		
220. **Ishares Core US Aggregate ETF	C	Dividend	O	T	Buy	11/21/22	O		
221. **Ishares Inc. Core MSCI EMarkets		None			Sold	01/13/22	K	A	

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
Henderson, Karen L.	01/31/2024

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. **Ishares MSCI Emerging Markets ETF		None			Buy	10/12/22	L		
223.					Sold	11/21/22	L	C	
224. **Ishares MSCI EAFE Int.	B	Dividend	K	T	Buy	11/18/22	J		
225.					Buy (add'l)	11/21/22	K		
226. **Ishares MSCI USA Min Vol Factor ETF	A	Dividend	L	T	Buy	08/30/22	L		
227.					Buy (add'l)	08/31/22	J		
228.					Sold (part)	10/12/22	L		
229.					Buy (add'l)	11/21/22	L		
230.					Sold (part)	11/22/22	J		
231. **Ishares Russell 2000 ETF	A	Dividend			Buy (add'l)	06/09/22	J		
232.					Sold (part)	08/30/22	J		
233.					Buy (add'l)	08/31/22	J		
234.					Sold (part)	10/12/22	J		
235.					Sold	11/21/22	K	C	
236. **Ishares Russell Mid-Cap ETF	B	Dividend			Buy (add'l)	06/09/22	J		
237.					Sold	08/30/22	M	E	
238. **Ishares Russell Mid-Cap Growth ETF	A	Dividend	L	T	Buy (add'l)	08/30/22	L		

1. Income Gain Codes: (See Columns B1 and D4) A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; 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
Henderson, Karen L.	01/31/2024

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)	
239.					Buy (add'l)	08/31/22	J		
240.					Sold (part)	10/12/22	L		
241.					Buy (add'l)	11/21/22	L		
242.					Sold (part)	11/22/22	J		
243. **Ishares Russell Mid-Cap Value ETF	B	Dividend	M	T	Buy	08/30/22	M		
244.					Buy (add'l)	08/31/22	J		
245.					Sold (part)	10/12/22	L		
246.					Buy (add'l)	11/21/22	M		
247.					Buy (add'l)	11/22/22	J		
248. **Ishares Russell Top 200 Growth ETF	B	Dividend	M	T	Buy (add'l)	01/13/22	K		
249.					Buy (add'l)	06/09/22	L		
250.					Sold (part)	08/30/22	M		
251.					Buy (add'l)	08/31/22	J		
252.					Sold (part)	10/12/22	M		
253.					Buy (add'l)	11/21/22	M		
254.					Sold (part)	11/22/22	J		
255. **Ishares Russell Top 200 Value ETF	C	Dividend	M	T	Sold (part)	06/09/22	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
Henderson, Karen L.	01/31/2024

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.					Sold (part)	08/30/22	K		
257.					Buy (add'l)	08/31/22	J		
258.					Sold (part)	10/12/22	M		
259.					Buy (add'l)	11/21/22	M		
260.					Sold (part)	11/22/22	J	A	
261. **Ishares S&P 500 Value ETF		None			Buy	10/12/22	M		
262.					Sold	11/21/22	M	D	
263. **Ishares S&P 500 Growth ETF		None			Buy	10/12/22	M		
264.					Sold	11/21/22	M	D	
265. **Ishares TR Core MSCI EAFE ETF	C	Dividend	K	T	Sold (part)	06/09/22	J		
266.					Buy (add'l)	08/30/22	J		
267.					Buy (add'l)	08/31/22	J		
268.					Sold (part)	10/12/22	M		
269.					Buy (add'l)	11/21/22	K		
270.					Sold (part)	11/22/22	J		
271. ** Johem International Select Fund	B	Dividend	K	T	Buy	11/18/22	J		
272.					Buy (add'l)	11/21/22	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
Henderson, Karen L.	01/31/2024

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. **JP Morgan Exchange Traded Fd US	A	Dividend	K	T	Buy (add'l)	08/30/22	K		
274.					Buy (add'l)	08/31/22	J		
275.					Sold (part)	10/12/22	K	A	
276.					Buy (add'l)	11/21/22	K		
277.					Sold (part)	11/22/22	J	A	
278. **Mainstay Cbre Global Inf. Fund Class	A	Dividend			Sold (part)	06/08/22	J	A	
279.					Sold (part)	08/29/22	J	A	
280.					Buy (add'l)	08/30/22	J		
281.					Sold	11/18/22	J		
282. **Morgan Stanley Inst. Growth		None			Sold	06/08/22	K		
283. **Nuveen Global Infs. Fund Class	A	Dividend			Sold (part)	06/08/22	J	A	
284.					Sold (part)	08/29/22	J	A	
285.					Buy (add'l)	08/30/22	J		
286.					Buy (add'l)	10/17/22	J		
287.					Buy (add'l)	10/17/22	J		
288.					Sold (part)	10/17/22	J	A	
289.					Sold (part)	10/17/22	J	A	

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
Henderson, Karen L.	01/31/2024

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.					Sold	11/18/22	J		
291. ** Pear Tree Polaris Fgn Value Small Cap	A	Dividend	J	T	Buy (add'l)	06/08/22	J		
292.					Buy (add'l)	08/29/22	J		
293.					Buy (add'l)	08/30/22	J		
294.					Sold (part)	10/11/22	J		
295.					Sold (part)	11/18/22	J		
296.					Sold (part)	11/21/22	J		
297. **Pear Tree Polaris Foreign Value Fund	B	Dividend	K	T	Buy	11/18/22	J		
298.					Buy (add'l)	11/21/22	K		
299. **Proshares TR Dj Brookfield Global Inf.	A	Dividend	J	T	Sold (part)	06/09/22	J	A	
300.					Sold (part)	08/30/22	J	A	
301.					Buy (add'l)	11/21/22	J		
302.					Buy (add'l)	11/22/22	J		
303. **T Rowe Price Inst.		None			Sold	01/12/22	K		
304. **TIAA-CREF Emerging Markets	A	Dividend	K	T	Buy (add'l)	08/29/22	J		
305.					Buy (add'l)	08/30/22	J		
306.					Buy (add'l)	08/30/22	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
Henderson, Karen L.	01/31/2024

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)	
307.					Buy (add'l)	11/18/22	J		
308.					Buy (add'l)	11/21/22	K		
309. **Vanguard FTS Developed		None			Buy	10/12/22	M		
310.					Sold	11/21/22	M	E	
311. **Vanguard Scottsdale Fds Vng	A	Dividend	K	T	Buy	11/21/22	K		
312. **Vanguard Short Term Bond Index	B	Dividend			Buy (add'l)	04/01/22	J		
313.					Sold (part)	04/01/22	J	A	
314.					Sold (part)	06/08/22	K		
315.					Sold (part)	08/30/22	J		
316.					Sold (part)	10/11/22	M		
317.					Sold	11/18/22	J		
318. Truist Bank Investment Account	A	Interest	M	T					
319. Morgan Stanley Investment Account:									
320. **Morgan Stanley Cash Account	A	Interest	J	T					
321. **AT&T Inc: Common	B	Dividend	J	T					
322. **Bank of America Corp: Common	A	Dividend	J	T					
323. **Boeing Co: Common		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
Henderson, Karen L.	01/31/2024

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. **Chevron Corp: Common	A	Dividend	J	T					
325. **Kinder Morgan Incorp: Common	A	Dividend	J	T					
326. **Pfizer Inc: Common	A	Dividend	J	T					
327. **Viatris Inc: Common	A	Dividend	J	T					
328. **Warner Bros Discovery Inc: Common		None	J	T	Spinoff (from line 321)	04/13/22	J		
329. **Ishares Russell 1000 Value ETF	A	Dividend	K	T	Buy	03/18/22	K		
330. Morgan Stanley IRA Account:									
331. **Morgan Stanley Cash Account	A	Interest	J	T					
332. **AT&T Inc: Common	C	Dividend	K	T					
333. **Bank of America Corp: Common	A	Dividend	K	T					
334. **Boeing Co: Common		None	K	T					
335. **Chevron Corp: Common	B	Dividend	L	T					
336. **Kinder Morgan Incorp: Common	B	Dividend	K	T					
337. **Pfizer Inc: Common	B	Dividend	K	T					
338. **Viatris Inc: Common	A	Dividend	J	T					
339. **Warner Bros Discovery Inc: Common		None			Spinoff (from line 332)	04/13/22	J		
340.					Sold	12/12/22	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
Henderson, Karen L.	01/31/2024

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)	 (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	 (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	 (2) Date mm/dd/yy	 (3) Value Code 2 (J-P)	 (4) Gain Code 1 (A-H)	
341. **Ishares Russell 1000 Value ETF	A	Dividend	K	T	Buy	03/18/22	K		
342. Merrill Lynch IRA Account:									
343. **Bank of America, NA RASP	A	Interest	M	T	Sold (part)	11/07/22	K		
344. **BA CA, NA RASP	A	Interest			Sold	11/07/22	K		
345. Merrill Lynch SEP Account:									
346. **Bank of America, NA RASP	A	Interest	M	T	Sold (part)	11/07/22	K		
347. **BA CA, NA RASP	A	Interest			Sold	11/07/22	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
Henderson, Karen L.	01/31/2024

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

Name of Person Reporting	Date of Report
Henderson, Karen L.	01/31/2024

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/ Karen L. Henderson

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