AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

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

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Henderson, Karen L.	US Circuit Court of Appeals, District of Columbia	5/7/2024
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	01/01/2023 **to** 12/31/2023
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.	5/7/2024

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	A	Interest	K	T					
3. First Citizens Savings Account	A	Interest	M	T					
4. First Citizens Investment Account:									
5. **Liquid Insured Deposits	A	Interest	J	T	Buy	04/14/23	M		
6.					Sold (part)	04/28/23	M		
7. **Goldman Sachs Bank USA CD	D	Interest	N	T	Buy	04/28/23	M		
8. First Citizens Marital Non-QTIP Trust									
9. **Artisan International Small Mid-Fund		None	K	T	Sold (part)	04/25/23	J	A	
10.					Sold (part)	07/19/23	J	A	
11.					Buy (add'l)	10/18/23	J		
12. **Ashmore Emerging Markets Active	A	Dividend			Sold	04/25/23	M	B	
13. **William Blair Small Cap Growth Fund	A	Distribution	K	T	Buy	04/25/23	K		
14.					Sold (part)	07/19/23	J	A	
15.					Buy (add'l)	10/18/23	J		
16.					Buy (add'l)	12/18/23	J		
17. **Ballie Gifford Emerging Markets		None			Sold	04/25/23	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		

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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.)*

☐ 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. ** Delaware Small Cap Growth Fund Inst		None			Sold	04/25/23	K	B	
19. **Driehaus Emerging Markets Growth Fund	B	Dividend	L	T	Buy	04/25/23	M		
20.					Sold (part)	07/19/23	J	A	
21.					Sold (part)	10/18/23	J	A	
22. **Federated Hermes Mdt Small Cap Core Fund		None			Sold	04/25/23	K		
23. **Goldman Sachs Fin Sq Gov Fund	D	Interest	M	T	Buy (add'l)	03/31/23	K		
24.					Sold (part)	03/31/23	K		
25.					Buy (add'l)	06/30/23	O		
26.					Sold (part)	06/30/23	N		
27.					Buy (add'l)	09/29/23	M		
28.					Sold (part)	09/29/23	M		
29.					Buy (add'l)	12/29/23	M		
30.					Sold (part)	12/29/23	M		
31. **Goldman Sachs Emerging Markets	C	Dividend	L	T	Buy (add'l)	04/25/23	J		
32.					Sold (part)	07/19/23	J		
33.					Sold (part)	10/18/23	L	A	
34. **Hotchkis & Wiley Small Cap Diversified Value #1131	A	Dividend	K	T	Buy	07/19/23	K		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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35.	C	Distribution			Buy (add'l)	10/18/23	J		
36.					Buy (add'l)	12/11/23	J		
37. **Invesco Small Cap Value Fund		None			Sold	04/25/23	K		
38. **Ishares Core US Aggregate ETF	F	Dividend	P1	T	Sold (part)	04/26/23	M	D	
39.					Buy (add'l)	07/20/23	M		
40.					Buy (add'l)	10/19/23	L		
41. **Ishares 10-20 Year Treasury Bond ETF	D	Dividend	M	T	Buy	04/26/23	N		
42.					Sold (part)	07/20/23	K		
43.					Sold (part)	10/19/23	L		
44. **Ishares Inc Core Msci Emkt	B	Dividend	L	T	Buy	04/26/23	L		
45.					Sold (part)	07/20/23	J	A	
46.					Sold (part)	10/19/23	J		
47. **Ishares MSCI EAFE Int.		None			Sold	04/25/23	M	E	
48. **Ishares Russell Mid-Cap Growth ETF	B	Dividend	M	T	Sold (part)	04/26/23	M	D	
49.					Sold (part)	07/20/23	K	C	
50.					Buy (add'l)	10/19/23	J		
51. **Ishares Russell Mid-Cap Value ETF	D	Dividend	N	T	Sold (part)	04/26/23	N		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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52.					Sold (part)	07/20/23	K	B	
53.					Buy (add'l)	10/19/23	L		
54. **Ishares MSCI USA Min Vol Factor ETF	C	Dividend			Sold (part)	04/26/23	M	C	
55.					Sold (part)	07/20/23	M	C	
56.					Sold	10/19/23	M	B	
57. **Ishares Russell Top 200 Growth ETF	D	Dividend	P1	T	Buy (add'l)	04/26/23	L		
58.					Sold (part)	07/20/23	M	E	
59.					Buy (add'l)	10/19/23	L		
60. **Ishares Russell Top 200 Value ETF	E	Dividend	O	T	Buy (add'l)	04/26/23	N		
61.					Sold (part)	07/20/23	L	B	
62.					Sold (part)	10/19/23	L		
63. **Ishares TR Core MSCI EAFE ETF	D	Dividend	N	T	Buy (add'l)	04/26/23	M		
64.					Buy (add'l)	07/20/23	K		
65.					Buy (add'l)	10/19/23	K		
66. ** Johcm International Select Fund		None			Sold	04/25/23	M	D	
67. **JP Morgan Exchange Traded Fd US Value Fctr	C	Dividend	N	T	Buy	04/26/23	L		
68.					Buy (add'l)	07/20/23	M		

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69.						Buy (add'l)	10/19/23	K		
70.	**JP Morgan Exchange Traded Fd US Quality Fctr	C	Dividend	M	T	Buy (add'l)	04/26/23	L		
71.						Buy (add'l)	07/20/23	M		
72.						Sold (part)	10/19/23	L		
73.	**Mfs International Equity Fund	C	Dividend	M	T	Buy	04/25/23	M		
74.						Buy (add'l)	07/19/23	K		
75.						Buy (add'l)	10/18/23	J		
76.	**Pear Tree Polaris Fgn Value Small Cap	B	Dividend	K	T	Sold (part)	04/25/23	J		
77.						Sold (part)	07/19/23	J		
78.						Buy (add'l)	10/18/23	J		
79.	**Pear Tree Polaris Foreign Value Fund		None			Sold	04/25/23	M	D	
80.	**Proshares TR Dj Brookfield Global Inf. ETF	A	Dividend	K	T	Sold (part)	04/26/23	J	A	
81.						Sold (part)	07/20/23	J	A	
82.						Sold (part)	10/19/23	J		
83.	**SPDR Bloomberg High Yield Bond ETF	B	Dividend	K	T	Buy	04/26/23	K		
84.						Buy (add'l)	07/20/23	J		
85.						Buy (add'l)	10/19/23	J		

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86. **Thrivent Small Cap Stock #94		None	K	T	Buy	07/19/23	K		
87.					Buy (add'l)	10/18/23	J		
88. **TIAA-CREF Emerging Markets Equity		None			Sold	04/25/23	M	A	
89. **Transamerica International Equity Fund	D	Dividend	M	T	Buy	04/25/23	M		
90.					Buy (add'l)	07/19/23	K		
91.					Buy (add'l)	10/18/23	J		
92. **Vaneck J.P. Morgan Em Local Currency Bond ETF	C	Dividend	K	T	Buy	04/26/23	L		
93.					Sold (part)	07/20/23	J	A	
94.					Sold (part)	10/19/23	K		
95. **Vanguard Intl Equity Index Fds Global Ex-US Real Estate Index Fd ETF	B	Dividend	K	T	Buy	10/19/23	K		
96. **Vanguard Scottsdale Fds Vanguard Russell 2000 Value Index Fd ETF	A	Dividend			Buy	04/26/23	K		
97.					Sold	07/20/23	K	C	
98. **Vanguard Scottsdale Fds Vng Rus2000idx	A	Dividend	K	T	Sold (part)	04/26/23	K		
99.					Sold (part)	07/20/23	K	C	
100.					Buy (add'l)	10/19/23	J		
101. **Vanguard Real Estate ETF	B	Dividend	L	T	Buy (add'l)	04/26/23	K		
102.					Sold (part)	07/20/23	J	A	

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103.					Buy (add'l)	10/19/23	K		
104. First Citizens Marital QTIP Trust:									
105. **Artisan International Small-Mid Fund		None	J	T	Buy (add'l)	01/04/23	J		
106.					Buy (add'l)	01/20/23	J		
107.					Sold (part)	04/17/23	J		
108.					Sold (part)	04/19/23	J	A	
109.					Sold (part)	07/19/23	J	A	
110.					Buy (add'l)	10/18/23	J		
111. **Ashmore Emerging Markets Active		None			Buy (add'l)	01/04/23	J		
112.					Sold (part)	01/24/23	J	A	
113.					Sold	02/01/23	K	B	
114. **William Blair Small Cap Growth Fund	A	Distribution	J	T	Buy	01/20/23	J		
115.					Sold (part)	04/17/23	J	A	
116.					Buy (add'l)	04/19/23	J		
117.					Sold (part)	07/19/23	J	A	
118.					Buy (add'l)	10/18/23	J		
119.					Buy (add'l)	12/18/23	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	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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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. **Ballie Gifford Emerging Markets		None			Buy (add'l)	01/04/23	J		
121.					Sold (part)	01/20/23	J		
122.					Sold	01/26/23	K	B	
123. **Delaware Small Cap Growth Fund		None			Buy (add'l)	01/04/23	J		
124.					Sold	01/20/23	J	A	
125. **Driehaus Emerging Markets Growth Fund	A	Dividend	K	T	Buy	04/19/23	K		
126.					Sold (part)	07/19/23	J	A	
127.					Sold (part)	10/18/23	J		
128.					Buy (add'l)	12/28/23	J		
129. **Federated Hermes Mdt Small Cap Core		None			Buy (add'l)	01/04/23	J		
130.					Sold	01/20/23	J		
131. **Goldman Sachs Fin Sq Gov Fund [redacted]	B	Interest	K	T	Buy (add'l)	03/31/23	M		
132.					Sold (part)	03/31/23	M		
133.					Buy (add'l)	06/30/23	K		
134.					Sold (part)	06/30/23	K		
135.					Buy (add'l)	09/29/23	K		
136.					Sold (part)	09/29/23	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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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)	12/29/23	M		
138.					Sold (part)	12/29/23	M		
139. **Goldman Sachs Emerging Markets Equity Insights	A	Dividend	K	T	Buy (add'l)	01/04/23	J		
140.					Sold (part)	01/20/23	J		
141.					Buy (add'l)	02/06/23	J		
142.					Sold (part)	04/17/23	J		
143.					Buy (add'l)	04/19/23	J		
144.					Sold (part)	07/19/23	J	A	
145.					Sold (part)	10/18/23	J		
146.					Buy (add'l)	12/28/23	J		
147. **Hotchkis & Wiley Small Cap Diversified Value [redacted]	A	Distribution	J	T	Buy	07/19/23	J		
148.	A	Dividend			Buy (add'l)	10/18/23	J		
149.					Buy (add'l)	12/11/23	J		
150. **Invesco Small Cap Value		None			Buy (add'l)	01/04/23	J		
151.					Buy (add'l)	04/17/23	J		
152.					Sold	04/19/23	J		
153. **Ishares Core US Aggregate ETF	E	Dividend	O	T	Buy (add'l)	01/05/23	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
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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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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.)*

☐ 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)	01/23/23	M	C	
155.					Buy (add'l)	04/18/23	J		
156.					Buy (add'l)	04/20/23	L		
157.					Buy (add'l)	07/20/23	K		
158.					Buy (add'l)	10/19/23	K		
159.					Buy (add'l)	12/29/23	K		
160.	**Ishares J.P. Morgan USD Emerging Markets Bond ETF	A	Dividend			Buy	01/23/23	J		
161.					Buy (add'l)	04/18/23	J		
162.					Sold (part)	04/20/23	J		
163.					Sold	04/21/23	J		
164.	**Ishares 10-20 Year Treasury Bond ETF	C	Dividend	K	T	Buy	01/23/23	M		
165.					Buy (add'l)	04/18/23	J		
166.					Sold (part)	04/20/23	L		
167.					Sold (part)	07/20/23	J		
168.					Sold (part)	10/19/23	J		
169.	**Ishares MSCI EAFE Int.		None			Buy (add'l)	01/04/23	J		
170.					Sold (part)	01/20/23	J	A	

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

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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)	
171.					Sold (part)	04/17/23	J	A	
172.					Sold	04/19/23	K	C	
173. **Ishares MSCI USA Min Vol Factor ETF	A	Dividend			Buy (add'l)	01/05/23	J		
174.					Sold (part)	01/23/23	K		
175.					Sold (part)	04/18/23	J	A	
176.					Sold (part)	07/20/23	K	A	
177.					Sold	10/19/23	K	A	
178. **Ishares Russell Mid-Cap Growth ETF	A	Dividend	L	T	Buy (add'l)	01/05/23	J		
179.					Sold (part)	01/23/23	K	A	
180.					Sold (part)	04/18/23	J	A	
181.					Buy (add'l)	04/20/23	J		
182.					Sold (part)	07/20/23	J		
183.					Buy (add'l)	10/19/23	J		
184. **Ishares Russell Mid-Cap Value ETF	A	Dividend	L	T	Buy (add'l)	01/05/23	J		
185.					Sold (part)	01/23/23	L	A	
186.					Buy (add'l)	04/18/23	J		
187.					Buy (add'l)	04/20/23	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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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.					Sold (part)	07/20/23	J	A	
189.					Buy (add'l)	10/19/23	L		
190.					Buy (add'l)	12/29/23	J		
191. **Ishares Russell Top 200 Growth ETF	B	Dividend	N	T	Buy (add'l)	01/05/23	K		
192.					Sold (part)	01/23/23	J		
193.					Sold (part)	04/18/23	K	B	
194.					Buy (add'l)	04/20/23	K		
195.					Sold (part)	07/20/23	K	D	
196.					Buy (add'l)	10/19/23	K		
197.					Buy (add'l)	12/29/23	J		
198. **Ishares Russell Top 200 Value ETF	C	Dividend	M	T	Buy (add'l)	01/05/23	J		
199.					Buy (add'l)	01/23/23	L		
200.					Sold (part)	04/18/23	J	A	
201.					Buy (add'l)	04/20/23	K		
202.					Sold (part)	07/20/23	J	A	
203.					Sold (part)	10/19/23	K		
204.					Buy (add'l)	12/29/23	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
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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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205. **Ishares TR Core MSCI EAFE ETF	C	Dividend	L	T	Buy (add'l)	01/05/23	J		
206.					Buy (add'l)	01/23/23	K		
207.					Buy (add'l)	04/18/23	J		
208.					Sold (part)	04/18/23	J	A	
209.					Buy (add'l)	07/20/23	J		
210.					Buy (add'l)	10/19/23	J		
211.					Buy (add'l)	12/29/23	J		
212. **Ishares Inc Core Msci Emkt	A	Dividend	K	T	Buy	01/27/23	K		
213.					Buy (add'l)	02/07/23	K		
214.					Sold (part)	04/18/23	J		
215.					Sold (part)	04/20/23	K		
216.					Sold (part)	07/20/23	J	A	
217.					Sold (part)	10/19/23	J		
218.					Buy (add'l)	12/29/23	J		
219. ** Johcm International Select Fund		None			Buy (add'l)	01/04/23	J		
220.					Sold	01/20/23	K	B	
221. **JP Morgan Exchange Traded Fd US Value Fctr	B	Dividend	L	T	Buy	01/23/23	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
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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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222.					Sold (part)	04/18/23	J	A	
223.					Sold (part)	04/20/23	L	A	
224.					Buy (add'l)	07/20/23	K		
225.					Buy (add'l)	10/19/23	J		
226.					Buy (add'l)	12/29/23	J		
227. **JP Morgan Exchange Traded Fd US Quality Fctr	A	Dividend	L	T	Buy (add'l)	01/05/23	J		
228.					Buy (add'l)	01/23/23	K		
229.					Sold (part)	04/18/23	J	A	
230.					Buy (add'l)	07/20/23	K		
231.					Sold (part)	10/19/23	K	A	
232.					Buy (add'l)	12/29/23	J		
233. **Mfs International Equity Fund	A	Dividend	K	T	Buy	01/20/23	K		
234.					Sold (part)	04/17/23	J	A	
235.					Buy (add'l)	04/19/23	J		
236.					Buy (add'l)	07/19/23	J		
237.					Buy (add'l)	10/18/23	J		
238.					Buy (add'l)	12/28/23	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets)	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period			
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239. ** Pear Tree Polaris Fgn Value Small Cap	A	Dividend	J	T	Buy (add'l)	01/04/23	J	
240.					Buy (add'l)	01/20/23	J	
241.					Sold (part)	04/17/23	J	
242.					Sold (part)	04/19/23	J	
243.					Sold (part)	07/19/23	J	A
244.					Buy (add'l)	10/18/23	J	
245.					Buy (add'l)	12/28/23	J	
246. **Pear Tree Polaris Foreign Value Fund		None			Buy (add'l)	01/04/23	J	
247.					Sold	01/20/23	K	B
248. **Proshares TR Dj Brookfield Global Inf.	A	Dividend	J	T	Buy (add'l)	01/05/23	J	
249.					Sold (part)	01/23/23	J	A
250.					Buy (add'l)	04/20/23	J	
251.					Sold (part)	07/20/23	J	
252.					Sold (part)	10/19/23	J	
253.					Buy (add'l)	12/29/23	J	
254. **SPDR Bloomberg High Yield Bond ETF	A	Dividend	J	T	Buy	01/23/23	J	
255.					Buy (add'l)	04/18/23	J	

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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.)*

☐ 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)	04/20/23	J		
257.					Buy (add'l)	07/20/23	J		
258.					Buy (add'l)	10/19/23	J		
259.					Buy (add'l)	12/29/23	J		
260. **Thrivent Small Cap Stock [redacted]		None	J	T	Buy	07/19/23	J		
261.					Buy (add'l)	10/18/23	J		
262. **TIAA-CREF Emerging Markets		None			Buy (add'l)	01/04/23	J		
263.					Sold (part)	01/20/23	J	A	
264.					Buy (add'l)	02/06/23	J		
265.					Sold (part)	04/17/23	J		
266.					Sold	04/19/23	K	A	
267. **Transamerica International Equity Fund	B	Dividend	K	T	Buy	04/19/23	K		
268.					Buy (add'l)	07/19/23	J		
269.					Buy (add'l)	10/18/23	J		
270.					Buy (add'l)	12/28/23	J		
271. **Vaneck J.P. Morgan Em Local Currency Bond ETF	B	Dividend	J	T	Buy	01/23/23	K		
272.					Sold (part)	04/18/23	J		

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273.					Sold (part)	04/20/23	J		
274.					Sold (part)	07/20/23	J	A	
275.					Sold (part)	10/19/23	J		
276.					Buy (add'l)	12/29/23	J		
277. **Vanguard Intl Equity Index Fds Global Ex-US Real Estate Index Fd ETF	A	Dividend	J	T	Buy	01/23/23	J		
278.					Buy (add'l)	04/18/23	J		
279.					Sold (part)	04/20/23	J		
280.					Sold (part)	04/21/23	J		
281.					Buy (add'l)	10/19/23	J		
282.					Buy (add'l)	12/29/23	J		
283. **Vanguard Scottsdale Fds Vanguard Russell 2000 Value Index Fd ETF	A	Dividend			Buy	04/20/23	J		
284.					Sold	07/20/23	J	A	
285. **Vanguard Scottsdale Fds Vng Rus2000idx	A	Dividend	J	T	Buy (add'l)	01/05/23	J		
286.					Buy (add'l)	01/23/23	J		
287.					Buy (add'l)	04/18/23	J		
288.					Sold (part)	04/20/23	J		
289.					Sold (part)	07/20/23	J	A	

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290.					Buy (add'l)	10/19/23	J		
291. **Vanguard Real Estate ETF	A	Dividend	J	T	Buy	01/23/23	J		
292.					Buy (add'l)	04/18/23	J		
293.					Sold (part)	04/20/23	J		
294.					Sold (part)	07/20/23	J		
295.					Buy (add'l)	10/19/23	J		
296. Truist Bank Investment Account	B	Interest	M	T					
297. Morgan Stanley Investment Account:									
298. **Morgan Stanley Cash Account	A	Interest	J	T					
299. **AT&T Inc: Common	B	Dividend	K	T					
300. **Bank of America Corp: Common	A	Dividend	J	T					
301. **Boeing Co: Common		None	J	T					
302. **Chevron Corp: Common	A	Dividend	J	T					
303. **Kinder Morgan Incorp: Common	A	Dividend	J	T					
304. **Pfizer Inc: Common	A	Dividend	J	T					
305. **Viatris Inc: Common	A	Dividend	J	T					
306. **Warner Bros Discovery Inc: Common		None	J	T					

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307. **Ishares Russell 1000 Value ETF	A	Dividend	K	T					
308. Morgan Stanley IRA Account:									
309. **Morgan Stanley Cash Account	A	Interest	J	T					
310. **AT&T Inc: Common	B	Dividend	K	T					
311. **Bank of America Corp: Common	B	Dividend	K	T					
312. **Boeing Co: Common		None	K	T					
313. **Chevron Corp: Common	B	Dividend	K	T					
314. **Kinder Morgan Incorp: Common	A	Dividend	K	T					
315. **Pfizer Inc: Common	B	Dividend	K	T					
316. **Viatris Inc: Common	A	Dividend	J	T					
317. **Ishares Russell 1000 Value ETF	A	Dividend	J	T	Sold (part)	12/21/23	J		
318. Merrill Lynch IRA Account:									
319. **Bank of America, NA RASP	A	Interest	M	T					
320. Merrill Lynch SEP Account:									
321. **Bank of America, NA RASP	A	Interest	M	T					

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

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IX. CERTIFICATION.

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. app. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ 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
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