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
Larsen, Joan L.	U.S. Court of Appeals for the Sixth Circuit	05/11/2024
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 Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
Ann Arbor Federal Building 200 E. Liberty Street Ann Arbor, Michigan 48104		

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.	Adjunct Faculty	University of Michigan Law School
3.	Circuit Judge	United States Court of Appeals for the Sixth Circuit
4.	Trustee	Trust #2
5.	Trustee	Trust #3

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.	03/30/2023	University of Michigan, Salary	$20,000.00
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.	2023	University of Michigan, Salary
2.	2023	West Academic, Book Royalties
3.	2023	Self-employed expert witness
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.	Federalist Society National Convention	November 2023	Washington, DC	Panelist	Car service, Flight, Hotel, Meals
3.					
4.					
5.					
6.					

7.

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.	Kristin Hickman, University of Minnesota	Administrative Law Treatise	$1,906.00
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
Larsen, Joan L.	05/11/2024

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. JP Morgan Chase Checking Account	A	Interest	K	T					
2. [redacted] Brokerage (H)									
3. -Vanguard Total Stock Market ETF	A	Dividend	J	T	Buy (add'l)	01/06/23	J		
4. -Vanguard Federal Money Market Fund	A	Int./Div.	J	T	Sold (part)	01/04/23	J		
5.					Buy (add'l)	02/10/23	J		
6.					Buy (add'l)	02/17/23	J		
7.					Sold (part)	02/21/23	J		
8. -Vanguard Total Stock Market Index Fund	A	Dividend	K	T	Buy (add'l)	02/21/23	J		
9.					Sold (part)	04/05/23	J		
10.					Sold (part)	04/17/23	J		
11.					Sold (part)	04/28/23	J		
12.					Sold (part)	05/26/23	J		
13.					Sold (part)	07/17/23	J		
14.					Sold (part)	08/14/23	J		
15.					Sold (part)	09/11/23	J		
16. -Vanguard Growth ETF	A	Dividend	J	T	Buy	01/04/23	J		
17. -Alaska Air Common Stock	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

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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Larsen, Joan L.	05/11/2024

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☐ 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. Iowa 529 Plans (H)									
19. Aggressive Growth Portfolio (H)									
20. -Vanguard Institutional Total Stock Market Index Fund (60%)		None	K	T					
21. -Vanguard Total International Index Fund (40%)		None	K	T					
22. Michigan 529 Plans (H)									
23. Aggressive Age-Based Option (H)									
24. -TIAA-CREF Equity Index Fund		None	L	T					
25. -TIAA-CREF International Equity Index Fund		None	L	T					
26. -TIAA-CREF Emerging Markets Equity Index Fund		None	L	T					
27. -TIAA-CREF Bond Index Fund		None	L	T					
28. -TIAA-CREF Infaltion Linked Bond Fund		None	L	T					
29. -TIAA-CREF High-Yield Fund		None	L	T					
30. -Vanguard REIT Index Fund		None	L	T					
31. New Hampshire 529 Plan (H)									
32. Aggressive Growth Portfolio (H)									
33. -Fidelity Total Stock Market Index Institutional Premium Class (68.7%)		None	K	T					
34. -Fidelity Series Commodity Strategic Fund (1.4%)		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	
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☐ 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. -Fidelity International Index Institutional Premium Class (29.9%)		None	J	T					
36. Rollover IRA (H)									
37. -Fidelity International Index Fund	C	Int./Div.	M	T					
38. -Fidelity Contrafund	D	Int./Div.	M	T					
39. -Fidelty Government Cash Reserves	A	Dividend	J	T					
40. IRA (H)									
41. -Fidelity International Index	C	Int./Div.	M	T					
42. Inherited IRA (X) (H)									
43. -Fidleity Treasury Money Market	A	Int./Div.	J	T					
44. -Davis New York Venture	A	Int./Div.	K	T	Sold (part)	12/15/23	J		
45. -DWS Corci Equity Divident	A	Int./Div.	J	T					
46. -Lord Abbett Affiliated	A	Int./Div.	J	T					
47. -PGIM Jennison Growth Fund	A	Int./Div.	K	T					
48. -PGIM Jennison Health Sciences	A	Int./Div.	K	T					
49. -PGIM Jennison Utility	A	Int./Div.	K	T					
50. -PGIM Short-Term Corp Bond	A	Int./Div.	K	T					
51. -PGIM Total Return Bond	B	Int./Div.	K	T					

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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less K =$15,001 - $50,000 L =$50,001 - $100,000 M =$100,001 - $250,000
N =$250,001 - $500,000 O =$500,001 - $1,000,000 P1 =$1,000,001 - $5,000,000 P2 =$5,000,001 - $25,000,000
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52. Inherited Roth IRA (X) (H)									
53. -T Rowe Price Growth Stock Fund	A	Int./Div.	J	T					
54. -Fidelity Treasury Money Market	A	Int./Div.	J	T					
55. -Davis New York Venture	A	Int./Div.	J	T	Sold (part)	12/15/23	J		
56. -DWS Corci Equity Divident	A	Int./Div.	J	T					
57. -Lord Abbett Affiliated	A	Int./Div.	J	T					
58. -PGIM Jennison Growth Fund	A	Int./Div.	J	T					
59. -PGIM Jennison Health Sciences	A	Int./Div.	J	T					
60. -PGIM Jennison Utility	A	Int./Div.	J	T					
61. -PGIM Short-Term Corp Bond	A	Int./Div.	J	T					
62. -PGIM Total Return	A	Int./Div.	J	T					
63. University of Michigan, 401, 403, 457 Plans (H)									
64. -Fidelity Growth Strategy	A	Int./Div.	J	T					
65. -Fidelity International Index Fund	C	Int./Div.	L	T					
66. -Fidelity Total Market Index Fund	E	Int./Div.	P1	T					
67. Inherited Roth IRA - [redacted] (X) (H)									
68. -Fidelity Extended Market Index Fund	A	Int./Div.	K	T					

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69. IRA - [redacted] (H)									
70. -Fidelity Total Market Index Fund	D	Int./Div.	O	T	Buy (add'l)	01/05/23	J		
71. Rollover IRA - [redacted] (H)									
72. -Fidelity Extended Market 1 Index Fund	D	Int./Div.	N	T					
73. Roth IRA - [redacted] (H)									
74. -Fidelity International Index Fund	C	Int./Div.	M	T					
75. University of Florida 401(a) (H)									
76. -Vanguard Inst. Index	A	Int./Div.	J	T					
77. University of Michigan, 401, 403, 457 Plans - [redacted] (H)									
78. -Fidelity International Index Fund	E	Int./Div.	O	T	Buy (add'l)	01/01/23	J		
79.					Buy (add'l)	02/01/23	J		
80.					Buy (add'l)	03/01/23	J		
81.					Buy (add'l)	04/01/23	J		
82.					Buy (add'l)	05/01/23	J		
83.					Buy (add'l)	06/01/23	J		
84.					Buy (add'l)	07/01/23	J		
85.					Buy (add'l)	08/01/23	J		

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86.					Buy (add'l)	09/01/23	J		
87.					Buy (add'l)	10/01/23	J		
88.					Buy (add'l)	11/01/23	J		
89.					Buy (add'l)	12/01/23	J		
90. -Fidelity Total Market Index Fund	E	Int./Div.	P1	T	Buy (add'l)	01/01/23	J		
91.					Buy (add'l)	02/01/23	J		
92.					Buy (add'l)	03/01/23	J		
93.					Buy (add'l)	04/01/23	J		
94.					Buy (add'l)	05/01/23	J		
95.					Buy (add'l)	06/01/23	J		
96.					Buy (add'l)	07/01/23	J		
97.					Buy (add'l)	08/01/23	J		
98.					Buy (add'l)	09/01/23	J		
99.					Buy (add'l)	10/01/23	J		
100.					Buy (add'l)	11/01/23	J		
101.					Buy (add'l)	12/01/23	J		
102. -Fidelity Extended Market Index Fund	D	Int./Div.	O	T	Buy (add'l)	01/01/23	J		

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103.					Buy (add'l)	02/01/23	J		
104.					Buy (add'l)	03/01/23	J		
105.					Buy (add'l)	04/01/23	J		
106.					Buy (add'l)	05/01/23	J		
107.					Buy (add'l)	06/01/23	J		
108.					Buy (add'l)	07/01/23	J		
109.					Buy (add'l)	08/01/23	J		
110.					Buy (add'l)	09/01/23	J		
111.					Buy (add'l)	10/01/23	J		
112.					Buy (add'l)	11/01/23	J		
113.					Buy (add'l)	12/01/23	J		
114. BrokerageAccount (H)									
115. -Fidelity Government Money Market Fund	C	Dividend	L	T	Buy (add'l)	01/04/23	K		
116.					Sold (part)	01/13/23	M		
117.					Buy (add'l)	04/28/23	L		
118.					Buy (add'l)	09/05/23	K		
119.					Buy (add'l)	10/10/23	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
Larsen, Joan L.	05/11/2024

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.					Buy (add'l)	10/11/23	M		
121.					Buy (add'l)	10/12/23	M		
122. -Fidelity Michigan Municipal Money Market Fund	A	Dividend			Closed	1/13/23	M		
123. -Fidelity International Index Fund	E	Dividend	O	T	Buy (add'l)	01/17/23	J		
124.					Buy (add'l)	05/01/23	K		
125.					Buy (add'l)	09/06/23	K		
126.					Buy (add'l)	10/12/23	M		
127. -Fidelity Total Market Index Fund	D	Dividend	O	T	Buy (add'l)	01/04/23	K		
128.					Buy (add'l)	01/17/23	K		
129.					Buy (add'l)	05/01/23	K		
130.					Buy (add'l)	10/12/23	M		
131.					Buy (add'l)	12/18/23	M		
132. -Fidelity MI Municipal Income	D	Dividend	O	T	Buy (add'l)	01/04/23	J		
133.					Buy (add'l)	01/17/23	K		
134.					Buy (add'l)	09/06/23	J		
135.					Buy (add'l)	10/12/23	M		
136. Trust #1 -Residuary (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
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
Larsen, Joan L.	05/11/2024

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. -Green State Bank Account	A	Interest	J	T					
138. Trust #2 - Life Insurance (H)									
139. -Green State Bank Account	A	Interest	J	T					
140. Trust #3 - Living (X) (H)									
141. -Green State Bank Account	A	Interest	P1	T					
142. -JPMorganChase Savings	A	Interest	J		Open	09/20/23	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; 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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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
Larsen, Joan L.	05/11/2024

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

Name of Person Reporting	Date of Report
Larsen, Joan L.	05/11/2024

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/ Joan L. Larsen

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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