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
Rovner, Ilana D.	7th Circuit Court of Appeals	10/24/2024
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 (active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
United States Court of Appeals 219 S. Dearborn Street Chicago, IL 60604		

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.	Member Emertius, Board of Trustees	Illinois Institute of Technology
2.	Member, Board of Overseers	IIT-Chicago Kent College of Law
3.	Life Member, Board of Directors	Shirley Ryan Ability Lab (Formerly Rehabilitation Institue of Chicago)
4.	Trustee	Trust
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.	Annual	Rush Retirement Plan.	$4,182.45
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
Rovner, Ilana D.	10/24/2024

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. IRA Acct #5 (H)									See Part VIII Note 2
2. -Fidelity Government Cash Reserves	A	Dividend	J	T					
3. -Fidelity Government Income	A	Dividend	J	T					
4. -Fidelity GNMA Fund	A	Dividend	J	T					
5. -Fidelity Canada	A	Dividend	J	T					
6. Trust #1 - Account No. 2 (H)									
7. -Schwab Bank	A	Interest	L	T					
8. -Sch AMT Tax-Free Money Mt fd (SWWXX)	D	Dividend	N	T					
9. -Intel Corp CS	A	Dividend	J	T					
10. -Marriott Intl Inc. Cl A CS	C	Dividend	N	T					
11. -Medtronic, Inc	A	Dividend	K	T					
12. -Merck & Co	A	Dividend	J	T					
13. -Citigroup Inc	A	Dividend	J	T					
14. -T Rowe Price Tax Free Short Term Interm	B	Dividend	M	T					
15. -Vanguard GNMA Fund	C	Dividend	L	T					
16. -Allspring S/T Mun (frmly Wells Fargo Advantage S/T Muni) Bd Inv	B	Dividend	L	T					
17. -Teradata Corp		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

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. -NCR Corp		None	J	T					
19. -NCR Voyix Corp		None	J	T	Spinoff (from line 18)	10/16/23	J		
20. -NCR Atleos Corp		None	J	T	Spinoff (from line 18)	10/16/23	J		
21. -Travelers Companies Inc	A	Dividend	K	T					
22. -Marriott Vacations	A	Dividend	K	T					
23. -Boeing Co		None	J	T					
24. -T J X COS, Inc.	A	Dividend	K	T					
25. -Lockheed Martin	A	Dividend	J	T					
26. -Schwab Value Advantage: SWVXX	D	Dividend	M	T					
27. -Pfizer Inc	A	Dividend	J	T					
28. -Viatris Inc	A	Dividend	J	T					
29. -US Treasury Bill		None	N	T					
30. IRA Acct #8 (H)									
31. -Schwab Bank	A	Interest	J	T					
32. -Vanguard Energy Fund	B	Dividend	K	T					
33. -Vanguard GNMA Fund	C	Dividend	L	T	Sold (part)	10/31/23	K		
34. -Vanguard Short Term Invesmt Grade Bond Fd	A	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less B =$1,001 - $2,500 C =$2,501 - $5,000 D =$5,001 - $15,000 E =$15,001 - $50,000
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2. Value Codes (See Columns C1 and D3)
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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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3. Value Method Codes (See Column C2)
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Rovner, Ilana D.	10/24/2024

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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)	
35. -TRowe Price New Era Fd	A	Dividend	J	T					
36. -Citigroup Inc	A	Dividend	J	T					
37. -Devon Energy Corp	A	Dividend	J	T					
38. -Dominion EnergyRes Inc	B	Dividend	K	T					
39. -Kinder Morgan Inc.	B	Dividend	K	T					
40. -Pimco Corp Income Fund	C	Dividend	K	T					
41. -Verizon Communications	B	Dividend	K	T					
42. -Harbor Core Plus Institutional	A	Dividend	K	T					
43. -TCW Total Return Bond	B	Dividend	K	T					
44. -Thompson Bond Fund	B	Dividend	L	T					
45. -Annaly Capital Mgmt	A	Dividend	J	T	Sold (part)	10/31/23	J		
46. -Office PPTYS Income Tr	A	Dividend			Sold	10/31/23	K		
47. -Ishares Iboxx Investment Grade Bond ETF	A	Dividend	J	T					
48. -SPDR Gold Shares ETF		None	J	T					
49. -Blackrock Enhcd Cap & Income	A	Dividend	J	T	Sold (part)	10/31/23	J		
50. -Visa Inc Cl A	A	Dividend	L	T					
51. -Guggenheim Strategic Opp	A	Dividend	J	T					

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52. -Schwab Value Advantage SWVXX	C	Dividend	L	T					
53. -Abbvie Inc	A	Dividend	K	T					
54. Trust #4 (H)									
55. -Fidelity Government Money Market (SPAXX)	E	Dividend	N	T					
56. -Fidelity Municipal Money Market (FTEXX)	D	Dividend	M	T					
57. -AT&T Inc Com	B	Dividend	K	T					
58. -Occidental Pete Corp	A	Dividend	J	T					
59. -Apple Inc	A	Dividend	M	T					
60. -Embridge Inc		None	J	T					
61. -Forits In Com ISIN		None	J	T					
62. -Ishares Inc MSCI Canada Index Fd	A	Dividend	K	T					
63. -Pimco Mun Income Fd II	A	Dividend	J	T					
64. -SPDR Ser Tr Morgan Stanley Tech	A	Dividend	K	T					
65. -Thornburg Strategic Munipal Income C (TSSCX)	B	Dividend	L	T					
66. -Vanguard GNMA Investor Cl (VFIIX)	A	Dividend	J	T					
67. -Columbia Interm Muni BD Cl A (LITAX)	B	Dividend	K	T					
68. -Warner Bros Discovery Inc		None	J	T					

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69. College Fund 529 #1 (H)									
70. -Capital World Growth & Income Fund Class 529A	B	Dividend	K	T					
71. -Capital World Growth and Income F2	A	Dividend	J	T					
72. -Fundamental Investors Class 529A	C	Dividend	L	T					
73. -Growth Fund of America Class 529A	C	Dividend	L	T					
74. -Washington Mutual Investors Fund Class 529A	D	Dividend	L	T					
75. -Washington Mutual Investors Fund F2	A	Dividend	J	T	Buy	11/30/23	J		
76. -American Balanced Fund	B	Dividend	L	T	Buy	11/30/23	J		
77. -American Balanced Fund F2	B	Dividend	L	T					
78. College Fund 529 #2 (H)									
79. -Capital World Growth & Income Fund Class 529A	B	Dividend	K	T					
80. -Fundamental Investors Class 529A	C	Dividend	L	T					
81. -Fundamental Investors 529F2	A	Dividend	J	T	Buy	11/30/23	J		
82. -Growth Fund of America Class 529A	D	Dividend	L	T					
83. -Washington Mutual Investors Fund Class 529A	D	Dividend	M	T					
84. -American Balanced Fund	B	Dividend	M	T					
85. -American Balanced Fund F2	B	Dividend	K	T					

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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
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86. Trust #5 (H)									
87. -UBS Bank USA Dep Acct	A	Interest	J	T					
88. -Ishares Core S&P 500	C	Dividend	N	T	Buy (add'l)	01/17/23	J		
89.					Sold (part)	01/17/23	J	C	
90.					Sold (part)	01/20/23	J	B	
91.					Sold (part)	01/27/23	K	D	
92.					Buy (add'l)	03/22/23	K		
93.					Sold (part)	06/09/23	L	E	
94.					Buy (add'l)	07/26/23	K		
95.					Sold (part)	07/03/23	J	A	
96.					Buy (add'l)	10/23/23	K		
97.					Buy (add'l)	11/30/23	K		
98.					Sold (part)	11/09/23	J	A	
99. -Ishares U.S. Technology ETF	A	Dividend	K	T	Sold (part)	01/17/23	J	A	
100.					Buy (add'l)	03/22/23	J		
101.					Sold (part)	06/09/23	J	C	
102.					Sold (part)	07/03/23	J	A	

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103.					Sold (part)	07/24/23	J	A	
104.					Sold (part)	10/19/23	J	A	
105.					Sold (part)	11/09/23	J	A	
106.					Buy (add'l)	11/30/23	J		
107. -Ishares S&P 500 Growth ETF	A	Dividend	J	T	Buy	06/24/23	K		
108.					Sold (part)	11/28/23	J	A	
109. -Ishares S&P 100 ETF	A	Dividend	J	T	Buy	10/19/23	J		
110.					Sold (part)	11/28/23	J		
111. -Ishares Global Energy ETF	A	Dividend	J	T	Buy	10/19/23	J		
112.					Buy (add'l)	11/13/23	J		
113.					Sold (part)	11/28/23	J		
114. -Ishares Core S&P Midcap ETF	A	Dividend			Buy	07/26/23	J		
115.					Sold	10/23/23	J		
116. -Ishares Core S&P 500 Small-Cap ETF DE	A	Dividend			Buy (add'l)	01/24/23	J		
117.					Sold (part)	01/17/23	J	A	
118.					Sold (part)	01/27/23	J	A	
119.					Sold	03/20/23	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

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
Rovner, Ilana D.	10/24/2024

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. -Ishares MSCI USA Quality Factor ETF	A	Dividend	L	T	Buy	03/20/23	L		
121.					Sold (part)	06/09/23	K	B	
122.					Sold (part)	07/03/23	J	A	
123.					Sold (part)	07/24/23	J	B	
124.					Sold (part)	10/19/23	J	A	
125.					Sold (part)	11/09/23	J	A	
126.					Sold (part)	11/28/23	J	A	
127. -Ishares Core MSCI Emerging Markets ETF	A	Dividend	J	T	Buy	01/12/23	K		
128.					Sold (part)	01/17/23	J		
129.					Sold (part)	01/20/23	J	A	
130.					Sold (part)	01/27/23	J	A	
131.					Buy (add'l)	03/08/23	J		
132.					Sold (part)	03/20/23	J		
133.					Sold (part)	06/09/23	J		
134.					Buy (add'l)	06/26/23	J		
135.					Sold (part)	07/24/23	J		
136.					Buy (add'l)	10/23/23	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
U =Book Value; V =Other; W =Estimated

Name of Person Reporting	Date of Report
Rovner, Ilana D.	10/24/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
137.					Sold (part)	11/09/23	J		
138.					Sold (part)	11/28/23	J		
139. -Ishares US Infrastructure ETF	A	Dividend	J	T	Buy	11/28/23	J		
140. -UBS Government Money Market Investments Fund Class P (PCEXX)		None			Sold (part)	01/12/23	J		
141.		None			Sold (part)	01/17/23	J		
142.					Buy (add'l)	01/23/23	K		
143.					Buy (add'l)	06/01/23	M		
144.					Buy (add'l)	07/25/23	J		
145.					Buy (add'l)	11/10/23	J		
146.					Sold	11/28/23	M		
147. -Ishares MSCI EAFE Growth ETF	A	Dividend	K	T	Buy (add'l)	01/17/23	J		
148.					Sold (part)	01/17/23	J		
149.					Sold (part)	01/27/23	J		
150.					Buy (add'l)	03/08/23	J		
151.					Buy (add'l)	03/22/23	J		
152.					Sold (part)	06/09/23	K		
153.					Sold (part)	07/24/23	J	B	

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
Rovner, Ilana D.	10/24/2024

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)	10/19/23	K		
155.					Sold (part)	11/09/23	J		
156.					Buy (add'l)	11/30/23	J		
157. -Ishares Trust Ishares ESG Aware MSCI USA ETF	B	Dividend			Sold (part)	01/12/23	J	C	
158.					Sold (part)	01/17/23	J	A	
159.					Sold (part)	01/20/23	J	B	
160.					Sold (part)	01/27/23	J	C	
161.					Buy (add'l)	03/08/23	J		
162.					Sold (part)	03/20/23	L	A	
163.					Sold (part)	06/09/23	J		
164.					Sold	07/24/23	K	B	
165. -Blackrock Multi-Asset Income Portfolio Instl Class	D	Dividend			Sold (part)	01/13/23	J		
166.					Sold (part)	01/17/23	J		
167.					Sold (part)	01/27/23	J		
168.					Buy (add'l)	03/07/23	J		
169.					Sold (part)	03/20/23	J		
170.					Buy (add'l)	06/12/23	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

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Rovner, Ilana D.	10/24/2024

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)	07/25/23	J		
172.					Sold (part)	10/19/23	J		
173.					Sold	11/09/23	L		
174. -Ishares MSCI EAFE Value ETF DE	B	Dividend	K	T	Sold (part)	01/17/23	J		
175.					Buy (add'l)	01/17/23	J		
176.					Sold (part)	01/27/23	J		
177.					Sold (part)	03/20/23	J		
178.					Sold (part)	06/09/23	J		
179.					Buy (add'l)	07/25/23	J		
180.					Buy (add'l)	11/30/23	J		
181.					Sold (part)	10/19/23	J		
182. -Ishares IBOXX $ INVT Grade Corporate Bond ETF	A	Dividend	K	T	Buy	07/24/23	J		
183.					Buy (add'l)	10/23/23	J		
184.					Sold (part)	11/09/23	J		
185.					Sold (part)	11/28/23	J		
186. -Ishares MSCI USA MIN VOL Factor ETF	A	Dividend	J	T	Buy (add'l)	01/17/23	J		
187.					Sold (part)	01/27/23	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; U =Book Value; V =Other; W =Estimated

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Rovner, Ilana D.	10/24/2024

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
188.					Buy (add'l)	03/08/23	J		
189.					Sold (part)	03/20/23	J		
190.					Sold (part)	06/09/23	J		
191.					Sold (part)	07/24/23	J	A	
192.					Sold (part)	10/19/23	J		
193. -Ishares Core Total USD Bond MKT ETF	C	Dividend	M	T	Buy (add'l)	01/17/23	K		
194.					Sold (part)	01/17/23	J		
195.					Sold (part)	01/20/23	J		
196.					Sold (part)	01/27/23	J		
197.					Buy (add'l)	03/08/23	J		
198.					Sold (part)	03/20/23	K		
199.					Sold (part)	06/09/23	K		
200.					Buy (add'l)	07/26/23	K		
201.					Sold (part)	10/19/23	J		
202.					Sold (part)	11/09/23	J		
203.					Sold (part)	11/28/23	K		
204. -Ishares Fallen Angles ETF	A	Dividend			Sold (part)	01/27/23	J		

1. Income Gain Codes: (See Columns B1 and D4)
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2. Value Codes (See Columns C1 and D3)
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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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3. Value Method Codes (See Column C2)
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Rovner, Ilana D.	10/24/2024

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.)*

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205.					Buy (add'l)	03/08/23	J		
206.					Sold (part)	03/20/23	J		
207.					Buy (add'l)	06/22/23	J		
208.					Sold (part)	07/24/23	J		
209.					Sold	07/03/23	J		
210. -Ishares GSCI Commodities Dynamic		None			Sold	01/12/23	J		
211. -Ishares MSCI Emerging Markets Min Vol Factor ETF		None			Sold	01/12/23	K		
212. -Ishares MSCI USA Momentum Factor ETF	A	Dividend	K	T	Buy (add'l)	01/17/23	J		
213.					Sold (part)	01/27/23	J	A	
214.					Buy (add'l)	03/08/23	J		
215.					Sold (part)	03/20/23	J		
216. -Ishares Conv Bond ETF	A	Dividend			Sold	01/12/23	J	A	
217. -Ishares 10-20 Year Treas Bond ETF	A	Dividend			Buy (add'l)	01/17/23	J		
218.					Buy (add'l)	03/08/23	J		
219.					Sold (part)	03/20/23	J		
220.					Sold (part)	06/09/23	J		
221.					Sold	07/24/23	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; 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.)*

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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)	
222. -Ishares MBS ETF	B	Dividend	K	T	Buy (add'l)	01/17/23	K		
223.					Sold (part)	01/20/23	J		
224.					Sold (part)	01/27/23	J		
225.					Buy (add'l)	03/08/23	J		
226.					Sold (part)	03/20/23	J	A	
227.					Sold (part)	06/09/23	J	A	
228.					Buy (add'l)	06/26/23	J		
229.					Sold (part)	07/24/23	K	A	
230.					Buy (add'l)	10/23/23	J		
231.					Sold (part)	11/09/23	J	A	
232.					Buy (add'l)	11/30/23	J		
233. -Ishares US Treasury Bond ETF	A	Dividend			Sold	01/12/23	K		
234.					Buy	03/20/23	K		
235.					Sold (part)	06/09/23	J		
236.					Sold (part)	06/26/23	J		
237.					Sold	07/24/23	K		
238. -Ishares 0-5 Year High Yield Corporate Bond ETF	A	Dividend			Sold (part)	01/12/23	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		
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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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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.)*

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239.					Sold (part)	01/20/23	J	A	
240.					Sold (part)	01/27/23	J	A	
241.					Buy (add'l)	03/08/23	J		
242.					Sold	03/20/23	J	A	
243. -Ishares JP Morgan USD Emerging Markets Bond ETF	A	Dividend	J	T	Buy	01/17/23	K		
244.					Sold (part)	01/17/23	J		
245.					Sold (part)	01/27/23	J	A	
246.					Buy (add'l)	03/08/23	J		
247.					Sold (part)	03/20/23	J		
248.					Buy (add'l)	06/22/23	J		
249.					Sold (part)	07/03/23	J		
250.					Buy (add'l)	10/23/23	J		
251.					Sold (part)	11/28/23	J		
252. -IShares 20+ Year Treas Bond ETF	A	Dividend	K	T	Buy	07/24/23	K		
253.					Buy (add'l)	10/23/23	J		
254.					Sold (part)	11/28/23	J		
255. -Ishares Treas Floating Rate ETF	A	Dividend	K	T	Buy	07/24/23	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)	
256.					Sold (part)	10/19/23	J	A	
257.					Buy (add'l)	11/13/23	J		
258.					Buy (add'l)	11/30/23	J		
259. -Franklin Inc ADV	A	Dividend	L	T	Buy	11/09/23	L		
260.					Sold (part)	11/28/23	J	A	
261. -Blackrock Ultra Short Term Bond ETF	B	Dividend			Buy	06/13/23	L		
262.					Buy (add'l)	06/22/23	J		
263.					Sold (part)	07/24/23	J	A	
264.					Sold (part)	10/19/23	J	A	
265.					Buy (add'l)	11/13/23	J		
266.					Sold	11/28/23	J	A	
267. Trust #6 (H)									
268. -Blackrock Multi Asset Income Portfolio Instl Class	D	Dividend			Sold (part)	01/12/23	J		
269.					Sold (part)	01/18/23	J		
270.					Buy (add'l)	03/21/23	J		
271.					Buy (add'l)	07/25/23	J		
272.					Sold (part)	10/20/23	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

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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Rovner, Ilana D.	10/24/2024

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.					Sold	11/09/23	M		
274. -UBS FDIC Insured Deposit Program Cash Account	A	Interest	K	T					
275. -Ishares Core S & P 500 ETF	C	Dividend	N	T	Buy (add'l)	01/17/23	J		
276.					Sold (part)	03/20/23	J	C	
277.					Sold (part)	07/03/23	J	B	
278.					Buy (add'l)	07/26/23	L		
279.					Buy (add'l)	10/24/23	J		
280.					Sold (part)	11/09/23	J	A	
281.					Sold (part)	11/16/23	L	E	
282.					Buy (add'l)	11/30/23	J		
283. -Ishares S&P 500 Growth ETF	A	Dividend	K	T	Buy	07/24/23	K		
284.					Sold (part)	10/23/23	J		
285.					Sold (part)	11/28/23	J	A	
286. -Ishares S&P 100 ETF		None	K	T	Buy	10/23/23	K		
287.					Sold (part)	11/28/23	J	A	
288. -Ishares S&P Midcap ETF	A	Dividend			Buy	07/26/23	J		
289.					Sold	10/20/23	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

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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Rovner, Ilana D.	10/24/2024

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. -Ishares MSCI USA Min Vol Factor	A	Dividend			Sold (part)	07/24/23	J		
291.					Sold	10/20/23	K		
292. -Ishares MSCI USA Quality Factor ETF	A	Dividend	L	T	Buy	03/22/23	L		
293.					Sold (part)	07/24/23	K	C	
294.					Sold (part)	10/20/23	J	A	
295.					Sold (part)	11/09/23	J	A	
296.					Sold (part)	11/16/23	J	A	
297.					Sold (part)	11/28/23	K	C	
298. -Ishares US Treasury Bond ETF	A	Dividend			Sold (part)	01/12/23	K		
299.					Buy (add'l)	03/22/23	L		
300.					Sold	07/24/23	L		
301. -Ishares Core S&P Small-Cap ETF DE		None			Sold (part)	01/12/23	J	A	
302.					Sold	03/20/23	J		
303. -Ishares Trust Ishares ESG Aware MSCI USA ETF	A	Dividend			Sold (part)	01/12/23	K	D	
304.					Sold (part)	03/20/23	L	C	
305.					Sold	07/24/23	K	C	
306. -UBS Government Money Market Investments Fund	B	Dividend			Buy (add'l)	07/25/23	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; 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)	
307.					Sold (part)	10/20/23	J		
308.					Buy (add'l)	11/10/23	J		
309.					Buy (add'l)	11/17/23	M		
310.					Sold	11/28/23	M		
311. -IShares U.S. Technology ETF	A	Dividend	K	T	Sold (part)	01/12/23	J	A	
312.					Sold (part)	01/17/23	J	A	
313.					Buy (add'l)	03/22/23	J		
314.					Sold (part)	07/03/23	J	B	
315.					Sold (part)	07/24/23	K	D	
316.					Buy (add'l)	10/24/23	J		
317.					Sold (part)	11/09/23	J	A	
318.					Sold (part)	11/16/23	J	A	
319.					Sold (part)	11/28/23	J	B	
320. -IShares MSCI EAFE Value ETF	C	Dividend	L	T	Sold (part)	01/12/23	J		
321.					Sold (part)	01/18/23	J		
322.					Sold (part)	03/20/23	J		
323.					Buy (add'l)	07/26/23	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)	
324.					Sold (part)	10/20/23	J		
325.					Sold (part)	11/28/23	J		
326. -Ishares MSCI EAFE Growth ETF	A	Dividend	K	T	Buy (add'l)	01/17/23	J		
327.					Sold (part)	01/18/23	J		
328.					Buy (add'l)	03/22/23	K		
329.					Sold (part)	07/24/23	K		
330.					Sold (part)	10/20/23	K		
331.					Sold (part)	11/09/23	J	A	
332.					Sold (part)	11/16/23	J	A	
333.					Sold (part)	11/28/23	J	A	
334. -IShares Core Total USD Bond MKT ETF	D	Dividend	M	T	Buy (add'l)	01/17/23	K		
335.					Sold (part)	01/18/23	J		
336.					Sold (part)	03/20/23	J		
337.					Buy (add'l)	07/26/23	J		
338.					Sold (part)	10/20/23	J		
339.					Buy (add'l)	11/13/23	J		
340.					Buy (add'l)	11/20/23	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

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)	
341.					Sold (part)	11/28/23	L		
342. -IShares Fallen Angles ETF	A	Dividend			Sold	07/24/23	J		
343. -IShares GSCI Commodities Dynamic		None			Sold	01/12/23	J		
344. -IShares MSCI Emerging Markets Min Vol Factor ETF		None			Sold	01/12/23	K		
345. -IShares Core MSCI Emerging Markets ETF	A	Dividend	K	T	Buy	01/17/23	L		
346.					Sold (part)	01/18/23	J		
347.					Sold (part)	03/20/23	J		
348.					Sold (part)	07/24/23	K	A	
349.					Sold (part)	10/20/23	J		
350.					Sold (part)	11/09/23	K		
351.					Buy (add'l)	11/28/23	K		
352. -IShares MSCI USA Momentum Factor ETF		None			Buy (add'l)	01/17/23	J		
353.					Sold	03/20/23	K		
354. -IShares CONV Bond ETF		None			Sold	01/12/23	J	A	
355. -IShares 10-20 Year Treas Bond ETF	A	Dividend			Buy (add'l)	01/17/23	J		
356.					Sold (part)	01/18/23	J		
357.					Sold (part)	03/20/23	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	
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)	
358.					Sold	07/24/23	K		
359. -IShares MBS ETF	A	Dividend	L	T	Buy (add'l)	01/17/23	K		
360.					Sold (part)	01/18/23	J	A	
361.					Buy (add'l)	03/22/23	J		
362.					Buy (add'l)	07/26/23	J		
363.					Buy (add'l)	10/24/23	J		
364.					Sold (part)	11/09/23	J	A	
365.					Buy (add'l)	11/20/23	J		
366.					Sold (part)	11/28/23	K	A	
367. -IShares 0-5 Year High Yield Corporate Bond ETF	A	Dividend			Sold (part)	01/18/23	K	A	
368.					Sold	03/20/23	K	A	
369. -Ishares Global Energy ETF		None	J	T	Buy	10/20/23	J		
370.					Buy (add'l)	11/13/23	J		
371.					Sold (part)	11/28/23	J		
372. -Ishares US Infrastructure ETF		None	J	T	Buy	11/28/23	J		
373. -Ishares MSCI Emerging Markets EX China ETF		None	J	T	Buy	10/20/23	J		
374.					Sold (part)	11/16/23	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	
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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)	
375.					Sold (part)	11/28/23	J	A	
376. -Ishares IBOXX $ INVT Grade Corporate Bond ETF	A	Dividend	K	T	Buy	07/24/23	K		
377.					Buy (add'l)	10/24/23	J		
378.					Buy (add'l)	11/30/23	J		
379. -Ishares 20+ Year Treas Bond ETF	A	Dividend	K	T	Buy	07/24/23	K		
380.					Buy (add'l)	10/24/23	J		
381.					Sold (part)	11/09/23	J		
382.					Sold (part)	11/28/23	J		
383. -Ishares JP Morgan USD Emerging Markets Bond ETF	A	Dividend	J	T	Buy	01/12/23	K		
384.					Sold (part)	01/18/23	J	A	
385.					Sold (part)	01/18/23	K		
386.					Buy (add'l)	07/26/23	J		
387.					Buy (add'l)	11/13/23	M		
388.					Sold (part)	11/16/23	M	A	
389. -Ishares Treas Floating Rate ETF	B	Dividend	K	T	Buy	07/24/23	L		
390.					Sold (part)	10/20/23	J	A	
391.					Buy (add'l)	11/13/23	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; 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)	
392.					Buy (add'l)	11/20/23	J		
393.					Sold (part)	11/28/23	J	A	
394. -Franklin Inc ADV	A	Dividend	M	T	Buy	11/28/23	M		
395. IRA #6 (H)									
396. -UBS Bank USA Dep Acct	B	Interest	J	T	Distributed (part)	03/29/23	L		
397. -American Funds American Balanced Fund Cl A	C	Dividend	M	T					
398. -American Funds Income Fund of America Cl A	D	Dividend	N	T					
399. -American Funds Capital Income Builder Fund CL A	D	Dividend	N	T					
400. IRA # 7 (H)									
401. -UBS Bank USA Dep Acct			M	T					
402. -American Funds American Balanced Fund Cl A(X)	D	Dividend	N	T					
403. -American Funds Income Fund of America Cl A(X)	E	Dividend	O	T					
404. -American Funds Capital Income Builder Fund CL A	E	Dividend	O	T					
405. IRA #4 (H)									
406. -UBS Bank USA Dep Acct	A	Interest	J	T					
407. -UBS Government Money Market Investments Fund Class P	A	Dividend	K	T	Buy	10/13/23	K		
408. -IShares Core S&P 500 ETF	D	Dividend	N	T	Sold (part)	01/12/23	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)	
409.					Buy (add'l)	07/25/23	K		
410. -IShares Core S&P Midcap ETF	A	Dividend			Buy	07/25/23	K		
411.					Sold	10/19/23	K		
412. -Ishares S&P 500 Growth ETF	A	Dividend	K	T	Buy	07/21/23	K		
413.					Buy (add'l)	04/14/23	K		
414.					Buy (add'l)	07/25/23	K		
415. -Ishares S&P 100 ETF		None	K	T	Buy	10/19/23	K		
416. -IShares Core S&P Small-Cap ETF		None			Sold	03/20/23	J		
417. -IShares MSCI EAFE Value ETF	C	Dividend	L	T	Sold (part)	01/12/23	J		
418.					Sold (part)	03/20/23	K		
419.					Buy (add'l)	04/14/23	J		
420.					Buy (add'l)	07/25/23	K		
421.					Sold (part)	10/19/23	J		
422. -IShares MSCI EAFE Growth ETF	A	Dividend	K	T	Buy (add'l)	01/17/23	J		
423.					Buy (add'l)	03/22/23	K		
424.					Buy (add'l)	04/03/23	J		
425.					Buy (add'l)	04/14/23	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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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)	
426.					Sold (part)	07/21/23	K		
427.					Sold (part)	10/19/23	K		
428. -IShares MSCI USA Min Vol Factor ETF	A	Dividend	K	T	Buy (add'l)	01/17/23	J		
429.					Buy (add'l)	04/03/23	J		
430.					Buy (add'l)	04/14/23	J		
431.					Sold (part)	07/21/23	J		
432.					Sold (part)	10/19/23	J		
433. -IShares MSCI USA Quality Factor ETF	B	Dividend	L	T	Buy	03/20/23	L		
434.					Buy (add'l)	04/03/23	J		
435.					Buy (add'l)	04/14/23	J		
436.					Sold (part)	07/21/23	K	C	
437. -IShares Trust IShares ESG Aware MSCI USA ETF	A	Dividend	K	T	Sold (part)	01/12/23	J		
438.					Sold (part)	03/20/23	L		
439.					Buy (add'l)	04/03/23	J		
440.					Buy (add'l)	04/14/23	J		
441.					Sold (part)	07/21/23	K	A	
442. -IShares US Treasury Bond ETF	A	Dividend			Sold (part)	01/12/23	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
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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)	
443.					Sold (part)	03/22/23	K		
444.					Buy (add'l)	04/03/23	J		
445.					Buy (add'l)	04/14/23	J		
446.					Sold	07/21/23	L		
447. -IShares Core Total USD Bond MKT ETF	D	Dividend	M	T	Buy (add'l)	01/17/23	K		
448.					Buy (add'l)	04/14/23	K		
449.					Buy (add'l)	07/25/23	K		
450.					Sold (part)	10/19/23	K		
451. -IShares GSCI Commodities Dynamic		None			Sold	01/30/23	J		
452. -Ishares Global Energy ETF		None	J	T	Buy	10/19/23	J		
453. -IShares U.S. Technology ETF	A	Dividend	K	T	Buy (add'l)	01/17/23	J		
454.					Buy (add'l)	03/22/23	J		
455.					Buy (add'l)	04/14/23	J		
456.					Sold (part)	07/21/23	K	D	
457.					Buy (add'l)	10/23/23	J		
458. -IShares Core MSCI Emerging Markets ETF	B	Dividend	K	T	Buy	01/12/23	L		
459.					Sold (part)	03/20/23	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

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.)*

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460.					Buy (add'l)	04/03/23	J		
461.					Buy (add'l)	04/14/23	J		
462.					Sold (part)	07/21/23	K		
463.					Buy (add'l)	10/23/23	J		
464. -IShares MSCI Emerging Markets Min Vol Factor ETF		None			Sold	01/12/23	K		
465. -IShares US Infrastructure ETF	A	Dividend	J	T	Buy (add'l)	04/03/23	J		
466.					Buy (add'l)	04/14/23	J		
467. -The Ishares MSCI Emerging Markets Ex China ETF	A	Dividend	J	T	Buy	10/19/23	J		
468. -Ishares IBOXX $ INVT Grade Corporate Bond ETF	A	Dividend	K	T	Buy	07/21/23	K		
469.					Buy (add'l)	10/23/23	J		
470. -Ishares 20+ Year Treas Bond ETF	A	Dividend	K	T	Buy	07/21/23	K		
471.					Buy (add'l)	10/23/23	J		
472. -IShares 10-20 Year Treas Bond ETF	A	Dividend			Buy (add'l)	01/17/23	J		
473.					Sold (part)	03/20/23	J		
474.					Buy (add'l)	04/03/23	J		
475.					Buy (add'l)	04/14/23	J		
476.					Sold	07/21/23	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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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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477. -IShares MBS ETF	B	Dividend	K	T	Buy (add'l)	01/17/23	K		
478.					Sold (part)	03/20/23	K	B	
479.					Buy (add'l)	04/14/23	J		
480.					Sold (part)	07/21/23	K	A	
481. -Ishares Treas Floating Rate ETF	A	Dividend	K	T	Buy	07/25/23	K		
482. -IShares 0-5 Year High Yield Corporate Bond ETF		None			Sold	01/12/23	K	B	
483. -IShares CONV Bond ETF		None			Sold	01/12/23	J		
484. -IShares MSCI USA Momentum Factor ETF	A	Dividend			Buy (add'l)	01/17/23	J		
485.					Sold	03/20/23	K		
486. -Ishares Trust Ishares 1-5 Year INVT Grade Corporate Bond ETF	A	Dividend			Buy (add'l)	04/03/23	K		
487.					Sold	07/21/23	K		
488. -Ishares TIPS Bond ETF	A	Dividend			Buy	07/25/23	J		
489.					Sold	10/19/23	J		
490. -Invesco S&P 500 Equal Weight ETF	A	Dividend	K	T	Buy	10/19/23	J		
491. IRA #9 (H)									
492. -UBS Bank USA Dep Acct	A	Interest	K	T	Distributed (part)	01/11/23	K		
493.					Distributed (part)	06/08/23	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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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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494.					Distributed (part)	07/25/23	J		
495.					Distributed (part)	08/10/23	K		
496.					Distributed (part)	09/11/23	K		
497.					Distributed (part)	09/14/23	L		
498.					Distributed (part)	10/17/23	J		
499.					Distributed (part)	11/30/23	K		
500.					Distributed (part)	12/01/23	J		
501.					Distributed (part)	12/12/23	K		
502. -American Funds Capital Income Builder Fund CL A	D	Dividend	O	T	Sold (part)	09/07/23	K	A	
503. -American Funds American Balanced Fund Cl A	D	Dividend	O	T	Sold (part)	11/28/23	L	D	
504. -American Funds Income Fund of America	E	Dividend	O	T	Sold (part)	09/07/23	K	B	
505.					Sold (part)	12/08/23	J	B	
506. -UBS Select Prime Institutional Fund	A	Dividend	J	T	Buy	10/12/23	K		
507.					Sold (part)	10/17/23	J		
508. IRA #11 (H)									
509. -Vanguard Dividend Growth Fund (VDIGX)	C	Dividend	N	T					
510. -Vanguard Federal Money Mkt Fnd	A	Dividend	J	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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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)	
511. -STerm Inf Pro Sec Idx Adm	A	Dividend	J	T					
512. -Vanguard Treasury Money Market (VUSXX)	A	Dividend	J	T					
513. -PRIMECAP Core Fund	A	Dividend	L	T					
514. -PRIMECAP Fund Admiral	A	Dividend	L	T					
515. -Vanguard INTL Growth Investor CL	A	Dividend	K	T					
516. -Vanguard Wellesley Income Investor CL	B	Dividend	K	T					
517. -Vanguard Dividend Appreciation ETF	B	Dividend	L	T					
518. -Schwab U S Dividend Equity ETF	A	Dividend	K	T					
519. Brokerage #3 (H)									
520. -Fidelity Government Money Market	B	Int./Div.	K	T					
521. -MFS Utilities Class A	A	Dividend	K	T					
522. -Fidelity Mass Muni Money Market	A	Dividend	J	T					
523. -Coinbase Global Inc Com CL A		None	J	T					
524. IRA #12 (H)									
525. -Vanguard Specialized Funds Div App ETF	B	Dividend	M	T					
526. -Vanguard Consumer Staples Vipers	A	Dividend	K	T					
527. -Vanguard Utils Vipers	A	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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)	
528. -SPDR Gold Tr Gold SHS		None	K	T					
529. -Cohen & Steers Realty Shares	A	Dividend	K	T					
530. -Fidelity Government Money Market	C	Dividend	M	T					
531. -WCM Focused Intl Growth Fund Investor		None	J	T					
532. -Schwab Strategic TR US Dividend Equity (SCHD)	A	Dividend	K	T					
533. -Select Sector SPDR Trust Technology (XLK)	A	Dividend	L	T					
534. -Abderdeen STD Gold ETF Tr Physcl (SGOL)		None	J	T					
535. -Qualcomm Inc (QCOM)	A	Dividend	K	T	Sold (part)	05/11/23	J	D	
536. -Invesco QQQ Tr Unit Ser 1	A	Dividend	K	T					
537. -JPMorgan Chase & Co.	A	Dividend	K	T					
538. -Morgan Stanley Com USD	A	Dividend	J	T					
539. -Ishares TR Ishares Semicdtr	A	Dividend	J	T					
540. -IShares Core S&P Small-Cap E	A	Dividend			Sold	05/12/23	J		
541. -Vaneck ETF Trust Semiconductr (SMH)	A	Dividend			Sold	05/12/23	J		
542. -Select Sector SPDR TR Financial	A	Dividend	J	T	Sold (part)	05/12/23	J		
543. -Oracle Corp	A	Dividend	J	T					
544. -ARK ETF TR Innovation ETF (ARKK)		None	J	T					

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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)	
545. -Advanced Micro Devices INC		None	K	T					
546. IRA #13 (H)									
547. -Berkshire Hathaway Inc Del Cl B		None	N	T					
548. -BHP Billiton Limited ADR Each Rep 2 Ord	A	Dividend	J	T					
549. -Ishares Russell Mid Cap	A	Dividend	K	T					
550. -Invesco QQQ Tr Unit Ser 1	B	Dividend	M	T					
551. -SPDR Gold Tr Gold SHS		None	L	T					
552. -Fidelity Contrafund		None	K	T					
553. -Fidelity Low Priced Stock	A	Dividend	K	T					
554. -Fidelity Govt Cash Reserves	A	Dividend	J	T					
555. -Vanguard Specialized Funds Div App ETF	A	Dividend	K	T					
556. -Goldman Sachs Group Inc Com	C	Dividend	L	T					
557. -Vanguard Index Funds S&P 500 ETF	A	Dividend	J	T					
558. -Woodside Energy Group LTD SPON	A	Dividend	J	T					
559. -T Rowe Price Exchange TRD FDS Inc	A	Dividend	J	T	Buy	08/15/23	J		
560. -Wisdomtree Trust U S Quality Growth FD	A	Dividend	J	T	Buy	08/15/23	J		
561. Bank Account #3 - Bank of America (H)	A	Interest	K	T					

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562. Bank Account #4 - Goldman Sachs (H)	B	Interest	J	T					
563. Bank Account #5 - Capital One (H)	A	Interest	J	T					
564. IRA #14 (H)									
565. -Amer. Funds American Balanced Fund Cl. A	C	Dividend	M	T					
566. -Amer. Funds Income Fund of America Cl A	D	Dividend	N	T					
567. -American Funds Capital Income Builder Fund CL A	D	Dividend	N	T					
568. -UBS Insured Sweep Program	A	Interest	J	T					
569. -UBS Select Prime Institutional Fund	A	Interest	J	T	Distributed (part)	03/28/23	L		
570. Brokerage #4 (H)									
571. -WisdomTree US Total Divid FD	A	Dividend	J	T					
572. -WisdomTree US L/C Divid FD	A	Dividend	J	T					
573. -ML Direct Deposit Program	A	Interest	J	T					
574. -WisdomTree US LargeCap	A	Dividend	J	T					
575. IRA#15 (H)									
576. -Vanguard Federal Money Market Fund	A	Dividend	J	T					
577. Brokerage #5 (H)									
578. -Vanguard Federal Money Market Fund	B	Dividend	K	T					See Part VIII Note 1

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579. -Vanguard Federal Money Market Investor CL (VMFXX)	A	Dividend	J	T					
580. -Vanguard Municipal Money Market (VMSXX)	A	Dividend	J	T					
581. -Vanguard Treasury Money Market Investor CL (VUSXX)	A	Dividend	J	T					

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

2023----------
Note 1: The security was unintentionally omitted from prior reports. It had a value of under $15,000 until 2023.
Note 2: Fidelity Government Money Market Fund on line #4 of prior year's report no longer fits the reporting requirements.

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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/ Ilana D. Rovner

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.
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