AO 10
Rev. 1/2019

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2021

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 101-111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Scudder, Jr., Michael Y.	Circuit Court - Seventh Circuit	05/03/2022
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**
Article III Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
219 S. Dearborn Street, Room 2648 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 pp. 9-13 of filing instructions)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Adjunct Professor of Law	Northwestern University Pritzker School of Law
2.	Lecturer in Law	University of Chicago Law School
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions)*

A. Filer's Non-Investment Income

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

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.	2021	University of Chicago Law School - Teaching	$14,000.00
2.	2021	Northwestern University Prtizker School of Law - Teaching	$13,750.00
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 AND TYPE
1.		
2.		
3.		
4.		

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)

☑ 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 pp. 28-31 of filing instructions.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Scudder, Jr., Michael Y.	05/03/2022

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. JPMorgan Chase Bank Account #1 (cash account)	A	Interest	K	T					
2. JPMorgan Chase Bank Account #2 (cash account)	A	Interest	K	T					
3. Navy Federal Credit Union Account (cash account)	A	Int./Div.			Closed	01/05/21	J		
4. JPMorgan Chase Bank Account #4 (cash account)	A	Interest	J	T					
5. JPMorgan Chase Bank Account #5 (cash account)	A	Interest	J	T					
6. PNC Bank Account #1 (cash account)	A	Interest	J	T					
7. Bank of America Account #1 (cash account)	A	Interest	J	T					
8. Bank of America Account #2 (cash account)	A	Interest	J	T					
9. Citi Private Bank Investment Account (H)									
10. - Western Asset Instl Government Money Market Deposit (MMDA12)	A	Interest			Sold	01/21/21	J		
11. - iShares Trust JPMorgan USD Emerging Mkts Bd ETF (EMB		None			Sold	01/21/21	L		
12. - iShares Gold Trust (IAU)		None			Sold	01/21/21	J		
13. - iShares Trust Latin Latin America 40 ETF (ILF)		None			Sold	01/21/21	J		
14. - iShares Trust Core S&P Small Cap ETF (IJR)		None			Sold	01/21/21	K		
15. - iShares Trust Russell 1000 Value ETF (IWD)		None			Sold	01/21/21	M		
16. - iShares Trust Russell 1000 Growth ETF (IWF)		None			Sold	01/21/21	M		
17. - iShares Trust Russell 2000 ETF (IWM)		None			Sold	01/21/21	K		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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18. - SPDR Bloomberg Barclays High Yield Bond ETF (JNK)		None			Sold	01/21/21	K		
19. - PIMCO Trust Enhanced Short Maturity Active ETF (MINT)	A	Dividend			Sold	01/21/21	K		
20. - iShares Trust Global REIT ETF (REET)		None			Sold	01/21/21	J		
21. - iShares Trust MSCI EAFE Small Cap ETF (SCZ)	A	Dividend			Sold	01/21/21	J		
22. - SPDR Series TR Nuveen Bloomberg Barclays Short Term Mun Bd ETF (SHM)		None			Sold	01/21/21	N		
23. - SPDR Series Trust Nuveen Bloomberg Barclays Municipal Bond ETF (TFI)		None			Sold	01/21/21	N		
24. - Vanguard INTL FD FTSE Developed Markets ETF (VEA)		None			Sold	01/21/21	M		
25. - Vanguard Specialized Funds Dividend Appreciation ETF (VIG)		None			Sold	01/21/21	K		
26. - Vanguard INTL Equity Index FDS FTSE Emerging Mkts ETF (VWO)		None			Sold	01/21/21	L		
27. Citi Private Bank Individual Retirement Account (H)									
28. - Western Asset Institutional Gov't Money Market Deposit (MMDA12)	A	Interest			Sold	01/21/21	K		
29. - Vanguard Bond Index FDS Total Bond Market ETF (BND)		None			Sold	01/21/21	J		
30. - iShares Gold Trust (IAU)		None			Sold	01/21/21	J		
31. - iShares Trust Core S&P Small Cap ETF (IJR)		None			Sold	01/21/21	J		
32. - iShares Trust Latin America 40 ETF (ILF)		None			Sold	01/21/21	J		
33. - iShares Trust Russell 1000 Value ETF (IWD)		None			Sold	01/21/21	L		
34. - iShares Trust Russell 1000 Growth ETF (IWF)		None			Sold	01/21/21	L		

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35. - iShares Trust Russell 2000 ETF (IWM)		None			Sold	01/21/21	K		
36. - SPDR SER Trust Bloomberg Barclays High Yield Bond ETF (JNK)		None			Sold	01/21/21	J		
37. - PIMCO Trust Enhanced Short Maturity Active ETF (MINT)		None			Sold	01/21/21	J		
38. - iShares Trust Global REIT ETF (REET)	A	Dividend			Sold	01/21/21	J		
39. - iShares Trust Mortgage Real Estate ETF (REM)		None			Sold	01/21/21	J		
40. - iShares Trust MSCI EAFE Small Cap ETF (SCZ)	A	Dividend			Sold	01/21/21	J		
41. - Vanguard Intl FD FTSE Developed Markets ETF (VEA)		None			Sold	01/21/21	L		
42. - Vanguard Specialized Funds Dividend Appreciation ETF (VIG)		None			Sold	01/21/21	K		
43. - Vanguard Intl Equity Index FDS FTSE Emerging Mkts ETF (VWO)		None			Sold	01/21/21	K		
44. TD Ameritrade Individual Retirement Account #1 (H)									
45. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	L	T					
46. - Doubleline Strategic Commodity Fund (DBCMX)	C	Dividend	K	T	Buy	02/26/21	K		
47.					Sold (part)	03/16/21	J	A	
48. - iShares MSCI EAFE Growth ETF (EFG)	A	Dividend			Sold (part)	06/03/21	K	D	
49.					Sold	12/20/21	K	D	
50. - iShares MSCI EAFE Value ETF (EFV)	B	Dividend			Buy	02/08/21	K		
51.					Buy (add'l)	06/03/21	K		

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52.					Buy (add'l)	10/28/21	J		
53.					Sold	12/20/21	L		
54. - iShares Emerging Mkts Ex-China ETF (EMXC)	A	Dividend			Buy	10/28/21	K		
55.					Sold	12/20/21	K		
56. - VanEck Gold Miners ETF (GDX)	A	Dividend	K	T	Buy (add'l)	02/08/21	J		
57.					Buy (add'l)	10/28/21	J		
58. - iShares US Treasury Bond ETF (GOVT)	A	Dividend	L	T	Buy (add'l)	02/08/21	J		
59.					Buy (add'l)	06/03/21	J		
60.					Sold (part)	10/26/21	K		
61.					Buy (add'l)	12/20/21	L		
62. - iShares Gold Trust ETF (IAU)		None	L	T	Buy (add'l)	02/08/21	J		
63.					Buy (add'l)	03/17/21	J		
64. - Wisdom Tree International Quality Dividend Growth Fund (IQDG)	A	Dividend			Sold (part)	02/08/21	J	A	
65.					Sold	12/20/21	K	C	
66. - JPMorgan Hedged Equity Fund (JHEQX)	A	Dividend	M	T	Buy (add'l)	02/08/21	J		
67.					Sold (part)	09/21/21	J	A	
68.					Buy (add'l)	10/28/21	J		

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69.					Sold (part)	12/20/21	J	A	
70. - JPMorgan Ultra Short Income ETF (JPST)	A	Dividend	N	T	Sold (part)	03/17/21	K	A	
71.					Buy (add'l)	10/28/21	K		
72.					Buy (add'l)	12/20/21	M		
73. - Lord Abbett Developing Growth Fund (LADYX)	A	Dividend	J	T	Sold (part)	02/08/21	J		
74.					Sold (part)	06/03/21	J	A	
75. - Investco S&P 500 Pure Value ETF (RPV)	A	Dividend	K	T	Buy	06/03/21	K		
76. - Investco S&P 500 Equal Weights Materials ETF (RTM)	A	Dividend			Buy	02/08/21	J		
77.					Sold (part)	03/17/21	J	A	
78.					Sold	12/20/21	J	B	
79. - iShares Silver Trust ETF (SLV)		None	K	T	Buy	02/08/21	J		
80.					Buy (add'l)	03/17/21	J		
81.					Buy (add'l)	10/28/21	J		
82. - Vanguard Small-Cap Growth ETF (VBK)	A	Dividend	J	T	Sold (part)	02/08/21	J	B	
83.					Buy (add'l)	03/17/21	J		
84.					Buy (add'l)	06/03/21	J		
85.					Sold (part)	12/20/21	K	D	

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86. - Vanguard Small-Cap Value ETF (VBR)	A	Dividend			Sold (part)	02/08/21	J	A	
87.					Sold (part)	03/17/21	J	A	
88.					Buy (add'l)	06/03/21	J		
89.					Sold	12/20/21	K	D	
90. - Vanguard Energy ETF (VDE)	B	Dividend			Buy	02/08/21	J		
91.					Buy (add'l)	03/17/21	K		
92.					Sold (part)	10/26/21	J	A	
93.					Sold	12/20/21	K	B	
94. - Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	K	T	Sold (part)	02/08/21	K	C	
95.					Sold (part)	06/03/21	K	C	
96.					Sold (part)	12/20/21	J	A	
97. - Vanguard Mid-Cap ETF (VO)	A	Dividend			Sold (part)	02/08/21	J	B	
98.					Sold (part)	10/26/21	J	B	
99.					Sold	12/20/21	K	E	
100. - Vanguard Value ETF (VTV)	B	Dividend	L	T	Sold (part)	02/08/21	K	C	
101.					Sold (part)	03/17/21	J	A	
102.					Buy (add'l)	06/03/21	J		

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103. - Vanguard Growth ETF (VUG)	A	Dividend	K	T	Sold (part)	02/08/21	K	D	
104.					Sold (part)	03/17/21	K	D	
105.					Sold (part)	06/03/21	K	D	
106.					Sold (part)	09/21/21	J	C	
107.					Sold (part)	12/20/21	J	C	
108. - Vanguard Extended Market ETF (VXF)	A	Dividend			Buy	02/08/21	K		
109.					Sold	06/03/21	K		
110. - Wisdom Tree Emerging Mkts Ex-State Owned ETF (XSOE)	A	Dividend			Buy (add'l)	02/08/21	K		
111.					Buy (add'l)	06/03/21	J		
112.					Sold (part)	10/26/21	J		
113.					Sold	12/20/21	K		
114. TD Ameritrade Individual Retirement Account #2 (H)									
115. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	K	T					
116. - SPDR S&P Emerging Markets Small Cap ETF (EWX)	A	Dividend			Buy (add'l)	02/08/21	J		
117.					Sold	12/20/21	J	A	
118. - iShare Trust US-Treasure Bond ETF (GOVT)		None	J	T	Buy	12/20/21	J		
119. - JPMorgan Ultra-Short Income ETF (JPST)		None	L	T	Buy	12/20/21	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
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
120. - SPDR S&P Mid Cap 400 ETF (MDY)	A	Dividend			Buy	02/08/21	J		
121.					Sold	10/15/21	J	A	
122. - SPDR FTSE S&P 600 Small Cap Growth ETF (SLYG)	A	Dividend			Buy (add'l)	02/08/21	J		
123.					Buy (add'l)	10/15/21	J		
124.					Sold	12/20/21	J		
125. - SPDR S&P 600 Small Cap Value ETF (SLYV)	A	Dividend			Sold (part)	03/11/21	J	A	
126.					Buy (add'l)	10/15/21	J		
127.					Sold	12/20/21	J	B	
128. - SPDR Portfolio Developed World ex-U.S. ETF (SPDW)	A	Dividend			Buy (add'l)	02/08/21	J		
129.					Sold	12/20/21	J	B	
130. - SPDR Portfolio Emerging Markets ETF (SPEM)	A	Dividend			Buy (add'l)	10/15/21	J		
131.					Sold	12/20/21	J	B	
132. - SPDR Portfolio Large Cap ETF (SPLG)	A	Dividend			Sold (part)	02/08/21	J	B	
133.					Buy (add'l)	10/15/21	J		
134.					Sold	12/20/21	K	D	
135. - SPDR Portfolio Small Cap ETF (SPSM)	A	Dividend			Sold (part)	02/08/21	J	A	
136.					Sold	12/20/21	K	C	

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 pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
137. - SPDR Portfolio S&P 500 Growth ETF (SPYG)	A	Dividend			Sold (part)	02/08/21	J	B	
138.					Buy (add'l)	03/11/21	J		
139.					Sold (part)	10/15/21	J	A	
140.					Sold	12/20/21	K	D	
141. - SPDR Portfolio S&P 500 Value ETF (SPYV)	A	Dividend			Sold (part)	02/08/21	J	A	
142.					Sold	12/20/21	K	D	
143. - SPDR Energy Sector ETF (XLE)	A	Dividend			Buy	02/08/21	J		
144.					Buy (add'l)	03/11/21	J		
145.					Sold	10/15/21	J	A	
146. - SPDR Technology Select ETF (XLK)	A	Dividend			Sold (part)	02/08/21	J	A	
147.					Sold	03/11/21	J	B	
148. TD Ameritrade Individual Retirement Account #3 (H)									
149. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
150. - Vanguard Total Bond Market ETF (BND)	A	Dividend	J	T					
151. - Vanguard Small-Cap Index Fund ETF (VB)	A	Dividend	J	T					
152. - Vanguard Short-Term Corporate Bond (VCSH)	A	Dividend	J	T					
153. - Vanguard FTSE Developed Markets ETF (VEA)	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	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
154. - Vanguard Short-Term Treasury Index Fund ETF Shares (VGSH)	A	Dividend	J	T					
155. - Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	J	T					
156. - Vanguard Total Stock Market ETF (VTI)	A	Dividend	J	T					
157. - Vanguard Value ETF (VTV)	A	Dividend	J	T					
158. - Vanguard Growth ETF (VUG)	A	Dividend	J	T					
159. - Vanguard FTSE Emerging Markets ETF (VWO)	A	Dividend	J	T					
160. TD Ameritrade Individual Retirement Account #4 (H)									
161. - FDIC Insured Deposit Account (MMDA12)	A	Interest	M	T	Buy	01/21/21	J		
162. - Vanguard Total Bond Mrkt ETF (BND)		None			Buy	01/21/21	J		
163.					Sold	01/28/21	J	A	
164. - iShares US Treasury Bond ETF (GOVT)		None	K	T	Buy	12/20/21	K		
165. - iShares Core S&P Mid Cap ETF (IJH)	A	Dividend			Buy	02/08/21	K		
166.					Buy (add'l)	02/22/21	J		
167.					Buy (add'l)	02/24/21	J		
168.					Buy (add'l)	03/11/21	J		
169.					Sold (part)	06/02/21	K	B	
170.					Sold	07/23/21	L	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	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
171. - iShares Core S&P Small Cap ETF (IJR)		None			Buy	01/21/21	J		
172.					Sold	01/28/21	J	C	
173. - iShares Trust Latn Amer 40 ETF (ILF)		None			Buy	01/21/21	J		
174.					Sold	01/28/21	J	B	
175. - iShares TR Russell 1000 Value ETF (IWD)		None			Buy	01/21/21	L		
176.					Sold	02/08/21	L	E	
177. - iShares TR Russell 1000 Growth ETF (IWF)		None			Buy	01/21/21	L		
178.					Sold	02/08/21	L	E	
179. - iShares TR Russell 2000 ETF (IWM)	A	Dividend			Buy	01/21/21	K		
180.					Buy (add'l)	02/08/21	K		
181.					Buy (add'l)	02/24/21	J		
182.					Buy (add'l)	03/11/21	J		
183.					Sold (part)	06/02/21	K	D	
184.					Sold	07/23/21	K		
185. - iShares Russell 2000 Growth ETF (IWO)	A	Dividend			Buy	02/08/21	K		
186.					Buy (add'l)	02/22/21	J		
187.					Buy (add'l)	02/24/21	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 pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
188.					Buy (add'l)	03/11/21	J		
189.					Sold	06/02/21	L		
190. - SPDR Series Trust Bloomberg Brclys ETF (JNK)		None			Buy	01/21/21	J		
191.					Sold	01/28/21	J	A	
192. - JPMorgan Ultra-Short Income ETF (JPST)		None	N	T	Buy	12/20/21	N		
193. - Vanguard Mega Cap Growth ETF (MGK)	A	Dividend			Buy	07/23/21	L		
194.					Sold (part)	10/15/21	K	A	
195.					Sold	12/20/21	L	B	
196. - PIMCO ETF Trust Enhanced Short Maturity Active ETF (MINT)		None			Buy	01/21/21	J		
197.					Sold	01/28/21	J	A	
198. - Invesco S&P Small Cap Energy ETF (PSCE)	A	Dividend			Buy	02/22/21	K		
199.					Buy (add'l)	02/24/21	K		
200.					Buy (add'l)	03/11/21	K		
201.					Sold (part)	06/02/21	K	D	
202.					Sold	07/23/21	K		
203. - iShares Trust Global Reit ETF (REET)		None			Buy	01/21/21	J		
204.					Sold	01/28/21	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
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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 pp. 34-60 of filing instructions.)*

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A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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205. - iShares Trust Mortgage Rel ETF (REM)		None			Buy (add'l)	01/21/21	J		
206.					Sold	01/28/21	J	B	
207. - Invesco S&P Mid Cap 400 Pure Value ETF (RFV)	A	Dividend			Buy	02/08/21	K		
208.					Buy (add'l)	02/22/21	J		
209.					Buy (add'l)	02/24/21	J		
210.					Buy (add'l)	03/11/21	J		
211.					Sold (part)	06/02/21	K	C	
212.					Sold	07/23/21	K	B	
213. - Invesco S&P Equal Weight Industrial Sector ETF (RGI)	A	Dividend			Buy	06/02/21	L		
214.					Buy (add'l)	07/23/21	K		
215.					Sold	10/15/21	L	A	
216. - Invesco S&P 500 Pure Value ETF (RPV)	A	Dividend			Buy	06/02/21	L		
217.					Sold (part)	07/23/21	J		
218.					Buy (add'l)	10/15/21	K		
219.					Sold	12/20/21	L		
220. - Guggenheim S&P 500 Equal Weight ETF (RSP)	A	Dividend			Buy	07/23/21	L		
221.					Sold (part)	10/15/21	K	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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222.					Sold	12/20/21	L	A	
223. - Invesco S&P 500 Equal Weight ETF (RTM)	A	Dividend			Buy	06/02/21	L		
224.					Sold	07/23/21	K		
225. - Invesco S&P 500 Equal Weight ETF (RYF)	A	Dividend			Buy	06/02/21	L		
226.					Buy (add'l)	07/23/21	K		
227.					Sold (part)	10/15/21	K	A	
228.					Sold	12/20/21	L		
229. - Invesco S&P Small Cap 600 Pure Value ETF (RZV)	A	Dividend			Buy	02/08/21	K		
230.					Buy (add'l)	02/22/21	J		
231.					Buy (add'l)	02/24/21	J		
232.					Buy (add'l)	03/11/21	J		
233.					Sold (part)	06/02/21	K	D	
234.					Sold	07/23/21	K	C	
235. - iShares Trust Eafe Small Cap ETF (SCZ)		None			Buy	01/21/21	J		
236.					Sold	01/28/21	J	A	
237. - Vanguard FTSE Developed Markets ETF (VEA)		None			Buy	01/21/21	L		
238.					Sold	02/08/21	L	E	

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 pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
239. - Vanguard Information Tech ETF (VGT)	A	Dividend			Buy	07/23/21	L		
240.					Sold (part)	10/15/21	K	A	
241.					Sold	12/20/21	L	C	
242. - Vanguard Dividend Appreciation ETF (VIG)		None			Buy	01/21/21	K		
243.					Sold	02/08/21	K	C	
244. - Vanguard S&P 500 ETF (VOO)		None			Buy	10/15/21	L		
245.					Sold	12/20/21	L	B	
246. - Vanguard US Large Cap Value ETF (VTV)	A	Dividend			Buy	07/23/21	K		
247.					Buy (add'l)	10/15/21	K		
248.					Sold	12/20/21	L	B	
249. - Vanguard Emerging Markets ETF (VWO)		None			Buy	01/21/21	K		
250.					Sold	02/08/21	K	D	
251. - SPDR S&P Metals and Mining ETF (XME)	A	Dividend			Buy	10/15/21	L		
252.					Sold	12/20/21	L		
253. TD Ameritrade Investment Account #1 (H)									
254. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	K	T					
255. - Invesco BulletShares 2021 Corp Bond ETF (BSCL)	A	Dividend			Buy	02/05/21	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		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
256.					Sold	03/17/21	M		
257. - Doubleline Strategic Commodity Fund (DBCMX)	D	Dividend	L	T	Buy	03/17/21	L		
258.					Sold (part)	10/19/21	J		
259. - DoubleLine Low Duration Bond Fund (DBLSX)	B	Dividend	L	T	Buy (add'l)	02/05/21	K		
260. - Wisdom Tree US Quality Divident Growth ETF (DGRW)	A	Dividend	K	T	Buy (add'l)	03/17/21	J		
261.					Sold (part)	08/03/21	J		
262. - iShares EAFE Growth ETF (EFG)	A	Dividend	J	T	Buy (add'l)	03/17/21	J		
263.					Sold (part)	08/03/21	J	A	
264. - iShares MSCI EAFE Value ETF (EFV)	A	Dividend	K	T	Buy	02/08/21	J		
265.					Buy (add'l)	03/17/21	J		
266.					Buy (add'l)	06/03/21	J		
267. - SPDR DoubleLine Emerging Market Debt ETF (EMTL)	B	Dividend	K	T	Buy (add'l)	02/05/21	J		
268.					Buy (add'l)	02/05/21	J		
269. - iShares Emerging Mkts Ex-China ETF (EMXC)	A	Dividend	J	T	Buy	10/19/21	J		
270. - iShares US Treasury Bond ETF (GOVT)	A	Dividend			Buy (add'l)	02/05/21	K		
271.					Buy (add'l)	03/24/21	K		
272.					Sold (part)	08/03/21	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
273.					Sold	10/19/21	M		
274. - iShares Gold Trust (IAU)		None	M	T	Buy (add'l)	02/05/21	J		
275.					Buy (add'l)	02/08/21	J		
276.					Buy (add'l)	03/17/21	J		
277. - Wisdom Tree International Quality Dividend ETF (IQDG)	A	Dividend	J	T	Buy (add'l)	03/17/21	J		
278.					Sold (part)	08/03/21	J	A	
279.					Buy (add'l)	10/19/21	J		
280. - JPMorgan Hedged Equity Fund (JHEQX)	B	Dividend	M	T	Sold (part)	08/03/21	J	B	
281. - JPMorgan Ultra Short Income ETF (JPST)	B	Dividend	N	T	Buy (add'l)	02/05/21	K		
282.					Sold (part)	03/17/21	L	A	
283.					Buy (add'l)	06/03/21	K		
284.					Buy (add'l)	10/19/21	M		
285. - Lord Abbett Funds Inflation Focused I (LIFIX)	B	Dividend	M	T	Buy	03/17/21	M		
286. - Lord Abbett Funds Ultra Short Bond Fund (LUBAX)	A	Dividend			Buy (add'l)	02/05/21	K		
287.					Sold (part)	03/17/21	L	A	
288.					Sold	06/03/21	K	A	
289. - iShares AAA-A Investment Grade Corp Bond ETF (QLTA)	A	Dividend			Buy (add'l)	02/05/21	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 pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
290.					Sold	10/19/21	K	A	
291. - Invesco S&P 500 Pure Value ETF (RPV)	A	Dividend	K	T	Buy	06/03/21	K		
292. - iShares Silver Trust iShares ETF (SLV)		None	K	T	Buy	02/05/21	J		
293.					Buy (add'l)	02/08/21	J		
294.					Buy (add'l)	03/17/21	K		
295. - iShares MSCI USA Min Volatility ETF (USMV)	A	Dividend	K	T	Buy (add'l)	03/17/21	J		
296.					Sold (part)	10/19/21	J	A	
297. - Vanguard Energy ETF (VDE)	A	Dividend			Buy	03/17/21	J		
298.					Sold	10/19/21	J	B	
299. - Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	K	T	Sold (part)	02/08/21	J	A	
300.					Sold (part)	03/17/21	J	A	
301.					Sold (part)	06/03/21	J	D	
302.					Sold (part)	08/03/21	J	A	
303. - Vanguard Value ETF (VTV)	B	Dividend	L	T	Buy (add'l)	06/03/21	K		
304. - Vanguard Growth ETF (VUG)	A	Dividend	K	T	Sold (part)	02/05/21	J	A	
305.					Sold (part)	02/08/21	J	B	
306.					Sold (part)	03/17/21	J	A	

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

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

3 Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
307.					Sold (part)	06/03/21	K	D	
308.					Sold (part)	08/03/21	J	C	
309.					Buy (add'l)	10/19/21	J		
310. - Vanguard Extended Market ETF (VXF)	A	Dividend			Buy	02/08/21	J		
311.					Buy (add'l)	03/17/21	K		
312.					Sold	06/03/21	K		
313. - Wisdom Tree Emerging Markets Ex State-Owned ETF (XSOE)	A	Dividend	K	T	Buy (add'l)	02/08/21	J		
314.					Buy (add'l)	03/17/21	K		
315.					Sold (part)	10/19/21	J		
316. TD Ameritrade Investment Account #2 (H)									
317. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	K	T					
318. - Invesco BulletShares 2021 ETF (BSCL)	A	Dividend			Buy (add'l)	02/05/21	M		
319.					Sold	03/17/21	M		
320. - Double Strategic Commodity Fund (DBCMX)	D	Dividend	L	T	Buy	03/17/21	L		
321.					Sold (part)	10/19/21	J	D	
322. - Doubleline Low Duration Bond Fund I (DBLSX)	B	Dividend	M	T	Buy	02/05/21	M		
323. - iShares MSCI EAFE Growth ETF (EFG)	A	Dividend	J	T	Buy (add'l)	03/17/21	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 pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
324.					Sold (part)	08/03/21	J	A	
325. - iShares MSCI EAFE Value ETF (EFV)	A	Dividend	J	T	Buy	02/08/21	J		
326.					Buy (add'l)	03/17/21	J		
327. - SPDR DoubleLine Emerging Mkts Debt ETF (EMTL)	B	Dividend	K	T	Buy (add'l)	02/05/21	J		
328.					Buy (add'l)	10/19/21	J		
329. - iShares US Treasury Bond ETF (GOVT)	A	Dividend			Buy (add'l)	02/05/21	J		
330.					Buy (add'l)	03/24/21	K		
331.					Sold	10/19/21	L		
332. - iShares Gold Trust ETF (IAU)		None	M	T	Buy (add'l)	02/05/21	J		
333.					Buy (add'l)	02/08/21	J		
334.					Buy (add'l)	03/17/21	J		
335. - iShares Barclays US Treasury 7-10 YR ETF (IEF)	A	Dividend			Sold	02/05/21	K		
336. - Wisdom Tree International Quality Dividend Growth Fund (IQDG)	A	Dividend	J	T	Buy (add'l)	03/17/21	J		
337.					Sold (part)	08/03/21	J	A	
338.					Buy (add'l)	10/19/21	J		
339. - JPMorgan Hedged Equity Fund (JHEQX)	B	Dividend	M	T	Sold (part)	08/03/21	J	B	
340. - JPMorgan Ultra Short Income ETF (JPST)	B	Dividend	N	T	Sold (part)	03/17/21	L	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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341.					Buy (add'l)	06/03/21	K		
342.					Sold (part)	08/03/21	J		
343.					Buy (add'l)	10/19/21	M		
344. - Lord Abbett Funds Inflation Focused I (LIFIX)	C	Dividend	N	T	Buy	03/17/21	M		
345. - Lord Abbott Funds Ultra Short Bond Fund (LUBAX)	A	Dividend			Sold (part)	03/17/21	M	A	
346.					Sold	06/03/21	K	A	
347. - iShares AAA-A Investment Grade Corp Bond ETF (QLTA)	A	Dividend			Buy (add'l)	02/05/21	J		
348.					Sold	10/19/21	L	A	
349. - Invesco S&P 500 Pure Value ETF (RPV)	A	Dividend	K	T	Buy	06/03/21	K		
350. - iShares Silver Trust ETF (SLV)		None	K	T	Buy	02/06/21	J		
351.					Buy (add'l)	02/08/21	J		
352.					Buy (add'l)	03/17/21	J		
353.					Buy (add'l)	10/19/21	J		
354. - SPDR S&P 500 Growth ETF (SPYG)	A	Dividend	K	T	Sold (part)	06/03/21	J	C	
355.					Sold (part)	08/03/21	J	B	
356. - SPDR S&P 500 Value ETF (SPYV)	A	Dividend	K	T	Buy (add'l)	06/03/21	J		
357. - iShares MSCI US Min Vol ETF (USMV)	A	Dividend	K	T	Sold (part)	02/08/21	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
358.					Sold (part)	06/03/21	J	A	
359.					Sold (part)	08/03/21	J	A	
360. - Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	K	T	Sold (part)	02/08/21	J	A	
361.					Sold (part)	06/03/21	J	A	
362.					Sold (part)	08/03/21	J	A	
363. - Vanguard Extended Market ETF (VXF)	A	Dividend			Buy	02/08/21	J		
364.					Buy (add'l)	03/17/21	J		
365.					Sold	06/03/21	J		
366. - WisdomTree Emerging Markets Ex-State Owned ETF (XSOE)	A	Dividend	J	T	Buy (add'l)	03/17/21	J		
367.					Buy (add'l)	10/19/21	J		
368. TD Ameritrade Investment Account #3 (H)									
369. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
370. - iShares Trust Growth Allocation ETF (AOR)	A	Dividend	J	T					
371. - Federated Prime Cash Obligations Fund (PRCXX)	A	Dividend	J	T					
372. TD Ameritrade Investment Account #4 (H)									
373. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
374. - iShares Trust Growth Allocation ETF (AOR)	A	Dividend	J	T	Buy (add'l)	06/21/21	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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Scudder, Jr., Michael Y.	05/03/2022

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
375. - JPMorgan Ultra-Short Income ETF (JPST)	A	Dividend	J	T	Buy	06/21/21	J		
376. - Federated Prime Cash Obligations Fund (PRCXX)	A	Dividend	J	T					
377. TD Ameritrade Investment Account #5 (H)									
378. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
379. - iShares Trust Growth Allocation ETF (AOR)	A	Dividend	J	T					
380. - Federated Prime Cash Obligations Fund (PRCXX)	A	Dividend	J	T					
381. TD Ameritrade Investment Account #6 (H)									
382. - FDIC Insured Deposit Account (MMDA12)	A	Interest	K	T	Buy	01/21/21	K		
383. - Invesco BulletShares 2021 Corp Bond ETF (BSCL)	A	Dividend			Buy	02/05/21	L		
384.					Sold (part)	03/24/21	K		
385.					Redeemed	10/26/21	L		
386. - iShares Trust JPMorgan USD EMG ETF (EMB)		None			Buy	01/21/21	L		
387.					Redeemed	01/28/21	L	A	
388. - iShares IS Treasiru Bond ETF (GOVT)	A	Dividend			Buy	02/05/21	K		
389.					Redeemed	10/26/21	K		
390. - iShares Gold Trust ETF (IAU)		None	K	T	Buy	01/21/21	J		
391.					Buy (add'l)	02/05/21	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	
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Name of Person Reporting	Date of Report
Scudder, Jr., Michael Y.	05/03/2022

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
392.					Buy (add'l)	03/24/21	K		
393. - iShares Core S&P Small Cap ETF (IJR)	A	Dividend	K	T	Buy	01/21/21	K		
394.					Buy (add'l)	02/08/21	J		
395.					Sold (part)	03/24/21	J		
396. - iShares Trust Latin America 40 ETF (ILF)		None			Buy	01/21/21	J		
397.					Redeemed	01/28/21	J	A	
398. - iShares Russell 1000 Value ETF (IWD)	B	Dividend	M	T	Buy	01/21/21	M		
399. - iShares Russell 1000 Growth ETF (IWF)	A	Dividend	M	T	Buy	01/21/21	M		
400.					Sold (part)	03/24/21	K	D	
401. - iShares Russell 2000 ETF (IWM)	A	Dividend	K	T	Buy	01/21/21	K		
402.					Buy (add'l)	02/08/21	J		
403. - SPDR Series Trust Blookberg Barclays ETF (JNK)		None			Buy	01/21/21	K		
404.					Redeemed	01/28/21	K	A	
405. - JPMorgan Ultra Short Income ETF (JPST)	B	Dividend	N	T	Buy	02/05/21	M		
406.					Buy (add'l)	10/28/21	M		
407. - Pimco ETF Trust Enhanced Short Maturity Active (MINT)		None			Buy	01/21/21	K		
408.					Redeemed	01/28/21	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
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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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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 pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
409. - iShares Trust Global Reit ETF (REET)		None			Buy	01/21/21	J		
410.					Redeemed	01/28/21	J	B	
411. - iShares Trist EAFE Small Cap ETF (SCZ)		None			Buy	01/21/21	J		
412.					Redeemed	01/28/21	J	A	
413. - SPDR Series Trust Nuveen Bloomberg SR ETF (SHM)		None			Buy	01/21/21	N		
414.					Sold (part)	01/28/21	K	A	
415.					Sold (part)	01/28/21	M	D	
416.					Sold (part)	01/28/21	M	C	
417.					Redeemed	01/28/21	K	B	
418. - SPDR Series Trust Nuveen Barclays Municipal Bond ETF (TFI)		None			Buy	01/21/21	N		
419.					Redeemed	01/28/21	N	E	
420. - Vanguard Energy ETF (VDE)	B	Dividend	K	T	Buy	03/24/21	K		
421.					Sold (part)	10/26/21	J	A	
422. - Vanguard FTSE Developed Markets (ETF) (VEA)	C	Dividend	M	T	Buy	01/21/21	M		
423. - Vanguard Specialized Funds Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	K	T	Buy	01/21/21	K		
424.					Sold (part)	02/08/21	J	B	
425.					Sold (part)	10/26/21	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
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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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Name of Person Reporting	Date of Report
Scudder, Jr., Michael Y.	05/03/2022

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
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426. - Vanguard Emerging Markets ETF (VWO)	B	Dividend	L	T	Buy	01/21/21	K		
427. Illinois Bright Directions 529 Account (H)									
428. Invesco Government Agency Portfolio		None	K	T					
429. Bright Directions Age-Based Allocation		None	L	T					
430. West Virginia Smart Select 529 Account #1 (H) (see Part VIII)									
431. - All Equity Portfolio D		None			Sold	08/09/21	K		
432. West Virginia Smart Select 529 Account #2 (H) (see Part VIII)									
433. - All Equity Portfolio D		None	K	T					
434. Farmland - LaGrange County, Indiana		None	M	W					
435. REC RT, L.L.C. 125 12.5% Preferred Units (REIT)	A	Dividend			Redeemed	12/22/21	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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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		

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

In Part VII, I have disclosed two accounts in the West Virgina Smart Select 529 Plan. I redeemed one of those accounts in 2021 to pay qualifying college tuition. In the remaining account, the principal is invested in an all equity portfolio. The Plan's fund manager is the Hartford Life Insurance Company. Beyond choosing an all equity portfolio concentration, I do not make or receive information about individual investment decisions within the accounts. The investment statement I receive shows only the aggregate market value of the account at reporting dates, not specific equity holdings that the Plan chose to invest in.

In January 2021, I chose to consolidate certain investment holdings by transferring my remaining investments at Citi Private Bank to new accounts at TD Ameritrade. Those transfers did not generate gains or losses (but instead were in-kind) and are reported in Part VII.

Name of Person Reporting	Date of Report
Scudder, Jr., Michael Y.	05/03/2022

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. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Michael Y. Scudder, Jr.

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. § 104)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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