AO 10
Rev. 3/2023

# FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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

| 1. Person Reporting (last name, first, middle initial) | 2. Court or Organization | 3. Date of Report |
|---|---|---|
| Stranch, Jane B. | Sixth Circuit Court of Appeals | 05/12/2023 |
| **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** |
| Active Circuit Judge | ☐ Nomination Date<br>☐ Initial ☑ Annual ☐ Final<br>**5b.** ☐ Amended Report | 01/01/2022 **to** 12/31/2022 |
| **7. Chambers or Office Address** | | |
| 701 Broadway, Room 330<br>Nashville, TN 37203 | | |

***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. | Partner | BF Partners |
| 2. | Co-Executor | Estate #2 |
| 3. | Partner | BL Partners |
| 4. | Co-Trustee | G-G Trust - No Ownership |
| 5. | Trustee | G-S Trust |
| 6. | | |

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

☑ NONE *(No reportable agreements.)*

| | DATE | PARTIES AND TERMS |
|---|---|---|
| 1. | | |
| 2. | | |
| 3. | | |

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

### A. Filer's Non-Investment Income

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

| | DATE | SOURCE AND TYPE | INCOME (yours, not spouse's) |
|---|---|---|---|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |

### B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

*(Dollar amount not required except for honoraria.)*

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

| | DATE | SOURCE |
|---|---|---|
| 1. | 2022 | Self-employed attorney |
| 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. | Judicial Conference | August 30 - September 2, 2022 | Louisville, KY | Circuit judicial conference | Transportation, lodging, food |
| 2. | Davis Investiture | September 29-30, 2022 | Detroit, MI | court governance | Transporation, lodging food |
| 3. | FJC National Symposium | November 3-4, 2022 | Washington, DC | educational seminar | Transportation, lodging, food |
| 4. | ABA Labor & Employment Law Section | November 10-11, 2022 | Washington, DC | activity of professional association | Transportation, lodging, food |
| 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 |
|---|---|
| **Stranch, Jane B.** | 05/12/2023 |

## 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 | 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) | |
| 1. Bank of America Accounts | A | Interest | M | T | | | | | |
| 2. CapStar Bank Account | A | Interest | L | T | | | | | |
| 3. UBS Financial Services, Inc. Accounts (H) | | | | | | | | | |
| 4. - UBS Bank USA Deposit Account | A | Interest | J | T | | | | | |
| 5. - American Funds Capital Income Builder Fund | D | Dividend | M | T | | | | | |
| 6. - Virtus Emerging Mkts Opportunities Fund | | None | | | Sold | 12/01/22 | K | | |
| 7. - Virtus Multi-Sector Short-Term Bond Fund | A | Dividend | | | Sold | 11/29/22 | K | | |
| 8. - First Eagle Global Fund Class A | D | Dividend | N | T | | | | | |
| 9. | | | | | Sold (part) | 11/29/22 | M | D | |
| 10. - Lincoln Life Deferred Income Annuity | F | Interest | O | T | | | | | |
| 11. - CapStar Financial Holdings, Inc. Stock (CSTR) | C | Dividend | M | T | | | | | |
| 12. -Morgan Stanley PRI NY US RT | | None | L | T | Buy | 12/08/22 | L | | |
| 13. -Beal Bank USA NY US RT | | None | L | T | Buy | 12/07/22 | L | | |
| 14. John Hancock USA Pension Plan #2 (H) | | | | | | | | | |
| 15. - American Funds 2025 TD | | None | N | T | | | | | |
| 16. | | | | | Sold (part) | 03/31/22 | J | | |
| 17. | | | | | Sold (part) | 06/30/22 | J | | |

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

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

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

| Name of Person Reporting | Date of Report |
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| **Stranch, Jane B.** | 05/12/2023 |

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

| A | B | | C | | D | | | | |
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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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| 18. | | | | | Sold (part) | 09/30/22 | J | | |
| 19. | | | | | Sold (part) | 12/31/22 | J | | |
| 20. - American Funds Capital Income Builder | | None | N | T | | | | | |
| 21. | | | | | Sold (part) | 03/31/22 | J | | |
| 22. | | | | | Sold (part) | 06/30/22 | J | | |
| 23. | | | | | Sold (part) | 09/30/22 | J | | |
| 24. | | | | | Sold (part) | 12/31/22 | J | | |
| 25. - Parnassus Core Equity Fund | | None | M | T | | | | | |
| 26. | | | | | Sold (part) | 03/31/22 | J | | |
| 27. | | | | | Sold (part) | 06/30/22 | J | | |
| 28. | | | | | Sold (part) | 09/30/22 | J | | |
| 29. | | | | | Sold (part) | 12/31/22 | J | | |
| 30. - Undiscovered Mgr Behavorial Value Fund | | None | M | T | | | | | |
| 31. | | | | | Sold (part) | 03/31/22 | J | | |
| 32. | | | | | Sold (part) | 06/30/22 | J | | |
| 33. | | | | | Sold (part) | 09/30/22 | J | | |
| 34. | | | | | Sold (part) | 12/31/22 | J | | |

| | | | | | |
|---|---|---|---|---|---|
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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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|---|---|---|---|---|---|---|---|---|---|
| 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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| 35. -American Funds 2030 TD | | None | N | T | | | | | |
| 36. | | | | | Sold (part) | 03/31/22 | J | | |
| 37. | | | | | Sold (part) | 06/30/22 | J | | |
| 38. | | | | | Sold (part) | 09/30/22 | J | | |
| 39. | | | | | Sold (part) | 12/31/22 | J | | |
| 40. John Hancock USA Pension Plan #4 (H) | | | | | | | | | |
| 41. - Invesco Developing Mkt Fund | | None | M | T | | | | | |
| 42. | | | | | Buy (add'l) | 01/14/22 | J | | |
| 43. | | | | | Buy (add'l) | 02/11/22 | J | | |
| 44. | | | | | Buy (add'l) | 03/11/22 | J | | |
| 45. | | | | | Buy (add'l) | 04/08/22 | J | | |
| 46. | | | | | Buy (add'l) | 05/06/22 | J | | |
| 47. | | | | | Buy (add'l) | 06/03/22 | J | | |
| 48. | | | | | Buy (add'l) | 07/01/22 | J | | |
| 49. | | | | | Buy (add'l) | 07/29/22 | J | | |
| 50. | | | | | Buy (add'l) | 08/22/22 | J | | |
| 51. | | | | | Buy (add'l) | 08/26/22 | J | | |

| | | | | | |
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| 52. | | | | | Buy (add'l) | 09/23/22 | J | | |
| 53. | | | | | Buy (add'l) | 10/21/22 | J | | |
| 54. | | | | | Buy (add'l) | 11/18/22 | J | | |
| 55. | | | | | Buy (add'l) | 12/16/22 | J | | |
| 56. | | | | | Sold (part) | 03/31/22 | J | | |
| 57. | | | | | Sold (part) | 06/30/22 | J | | |
| 58. | | | | | Sold (part) | 09/30/22 | J | | |
| 59. | | | | | Sold (part) | 12/13/22 | J | | |
| 60. | | | | | Sold (part) | 12/31/22 | J | | |
| 61. - American Funds 2020 TD | | None | O | T | | | | | |
| 62. | | | | | Buy (add'l) | 01/14/22 | J | | |
| 63. | | | | | Buy (add'l) | 02/11/22 | J | | |
| 64. | | | | | Buy (add'l) | 03/11/22 | J | | |
| 65. | | | | | Buy (add'l) | 04/08/22 | J | | |
| 66. | | | | | Buy (add'l) | 05/06/22 | J | | |
| 67. | | | | | Buy (add'l) | 06/03/22 | J | | |
| 68. | | | | | Buy (add'l) | 07/01/22 | J | | |

| | | | | | |
|---|---|---|---|---|---|
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| 69. | | | | | Buy (add'l) | 07/29/22 | J | | |
| 70. | | | | | Buy (add'l) | 08/22/22 | J | | |
| 71. | | | | | Buy (add'l) | 08/26/22 | J | | |
| 72. | | | | | Buy (add'l) | 09/23/22 | J | | |
| 73. | | | | | Buy (add'l) | 10/21/22 | J | | |
| 74. | | | | | Buy (add'l) | 11/18/22 | J | | |
| 75. | | | | | Buy (add'l) | 12/16/22 | J | | |
| 76. | | | | | Sold (part) | 03/31/22 | J | | |
| 77. | | | | | Sold (part) | 06/30/22 | J | | |
| 78. | | | | | Sold (part) | 09/30/22 | J | | |
| 79. | | | | | Sold (part) | 12/13/22 | J | | |
| 80. | | | | | Sold (part) | 12/31/22 | J | | |
| 81. - American Funds American Balanced Fund | | None | O | T | | | | | |
| 82. | | | | | Buy (add'l) | 01/14/22 | J | | |
| 83. | | | | | Buy (add'l) | 02/11/22 | J | | |
| 84. | | | | | Buy (add'l) | 03/11/22 | J | | |
| 85. | | | | | Buy (add'l) | 04/08/22 | J | | |

| | | | | | |
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| 86. | | | | | Buy (add'l) | 05/06/22 | J | | |
| 87. | | | | | Buy (add'l) | 06/03/22 | J | | |
| 88. | | | | | Buy (add'l) | 07/01/22 | J | | |
| 89. | | | | | Buy (add'l) | 07/29/22 | J | | |
| 90. | | | | | Buy (add'l) | 08/22/22 | J | | |
| 91. | | | | | Buy (add'l) | 08/26/22 | J | | |
| 92. | | | | | Buy (add'l) | 09/23/22 | J | | |
| 93. | | | | | Buy (add'l) | 10/21/22 | J | | |
| 94. | | | | | Buy (add'l) | 11/18/22 | J | | |
| 95. | | | | | Buy (add'l) | 12/16/22 | J | | |
| 96. | | | | | Sold (part) | 03/31/22 | J | | |
| 97. | | | | | Sold (part) | 06/30/22 | J | | |
| 98. | | | | | Sold (part) | 09/30/22 | J | | |
| 99. | | | | | Sold (part) | 12/13/22 | L | | |
| 100. | | | | | Sold (part) | 12/31/22 | J | | |
| 101. - Undiscovered Mgr Behavioral Value Fund | | None | N | T | | | | | |
| 102. | | | | | Buy (add'l) | 01/14/22 | J | | |

| | | | | | |
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| 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 |
|---|---|
| **Stranch, Jane B.** | 05/12/2023 |

## 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 | 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) | |
| 103. | | | | | Buy (add'l) | 02/11/22 | J | | |
| 104. | | | | | Buy (add'l) | 03/11/22 | J | | |
| 105. | | | | | Buy (add'l) | 04/08/22 | J | | |
| 106. | | | | | Buy (add'l) | 05/06/22 | J | | |
| 107. | | | | | Buy (add'l) | 06/03/22 | J | | |
| 108. | | | | | Buy (add'l) | 07/01/22 | J | | |
| 109. | | | | | Buy (add'l) | 07/29/22 | J | | |
| 110. | | | | | Buy (add'l) | 08/22/22 | J | | |
| 111. | | | | | Buy (add'l) | 08/26/22 | J | | |
| 112. | | | | | Buy (add'l) | 09/23/22 | J | | |
| 113. | | | | | Buy (add'l) | 10/21/22 | J | | |
| 114. | | | | | Buy (add'l) | 11/18/22 | J | | |
| 115. | | | | | Buy (add'l) | 12/16/22 | J | | |
| 116. | | | | | Sold (part) | 03/31/22 | J | | |
| 117. | | | | | Sold (part) | 06/30/22 | J | | |
| 118. | | | | | Sold (part) | 09/30/22 | J | | |
| 119. | | | | | Sold (part) | 12/13/22 | J | | |

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

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

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

| Name of Person Reporting | Date of Report |
|---|---|
| **Stranch, Jane B.** | 05/12/2023 |

## 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 | 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) | |
| 120. | | | | | Sold (part) | 12/31/22 | J | | |
| 121. - T. Rowe Price Sci & Tech Fund | | None | N | T | | | | | |
| 122. | | | | | Buy (add'l) | 01/14/22 | J | | |
| 123. | | | | | Buy (add'l) | 02/11/22 | J | | |
| 124. | | | | | Buy (add'l) | 03/11/22 | J | | |
| 125. | | | | | Buy (add'l) | 04/08/22 | J | | |
| 126. | | | | | Buy (add'l) | 05/06/22 | J | | |
| 127. | | | | | Buy (add'l) | 06/03/22 | J | | |
| 128. | | | | | Buy (add'l) | 07/01/22 | J | | |
| 129. | | | | | Buy (add'l) | 07/29/22 | J | | |
| 130. | | | | | Buy (add'l) | 08/22/22 | J | | |
| 131. | | | | | Buy (add'l) | 08/26/22 | J | | |
| 132. | | | | | Buy (add'l) | 09/23/22 | J | | |
| 133. | | | | | Buy (add'l) | 10/21/22 | J | | |
| 134. | | | | | Buy (add'l) | 11/18/22 | J | | |
| 135. | | | | | Buy (add'l) | 12/16/22 | J | | |
| 136. | | | | | Sold (part) | 03/31/22 | J | | |

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

| Name of Person Reporting | Date of Report |
|---|---|
| **Stranch, Jane B.** | 05/12/2023 |

## 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 | 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) | |
| 137. | | | | | Sold (part) | 06/30/22 | J | | |
| 138. | | | | | Sold (part) | 09/30/22 | J | | |
| 139. | | | | | Sold (part) | 12/13/22 | J | | |
| 140. | | | | | Sold (part) | 12/31/22 | J | | |
| 141. -BlueChip Growth Fund | | None | M | T | | | | | |
| 142. | | | | | Buy (add'l) | 01/14/22 | J | | |
| 143. | | | | | Buy (add'l) | 02/11/22 | J | | |
| 144. | | | | | Buy (add'l) | 03/11/22 | J | | |
| 145. | | | | | Buy (add'l) | 04/08/22 | J | | |
| 146. | | | | | Buy (add'l) | 05/06/22 | J | | |
| 147. | | | | | Buy (add'l) | 06/03/22 | J | | |
| 148. | | | | | Buy (add'l) | 07/01/22 | J | | |
| 149. | | | | | Buy (add'l) | 07/29/22 | J | | |
| 150. | | | | | Buy (add'l) | 08/22/22 | J | | |
| 151. | | | | | Buy (add'l) | 08/26/22 | J | | |
| 152. | | | | | Buy (add'l) | 09/23/22 | J | | |
| 153. | | | | | Buy (add'l) | 10/21/22 | J | | |

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

| Name of Person Reporting | Date of Report |
|---|---|
| **Stranch, Jane B.** | 05/12/2023 |

## 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 | 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) | |
| 154. | | | | | Buy (add'l) | 11/18/22 | J | | |
| 155. | | | | | Buy (add'l) | 12/16/22 | J | | |
| 156. | | | | | Sold (part) | 03/31/22 | J | | |
| 157. | | | | | Sold (part) | 06/30/22 | J | | |
| 158. | | | | | Sold (part) | 09/30/22 | J | | |
| 159. | | | | | Sold (part) | 12/13/22 | J | | |
| 160. | | | | | Sold (part) | 12/31/22 | J | | |
| 161. BF Partners (H) | | | | | | | | | |
| 162. - Pinnacle Bank Account | A | Interest | J | T | | | | | |
| 163. - Investment Property, Nashville, TN (Appraisal 4/09) | | None | O | Q | | | | | |
| 164. Northwestern Mutual: Whole Life Policy | C | Dividend | M | T | | | | | |
| 165. Pinnacle Bank Accounts | D | Interest | O | T | | | | | |
| 166. IRA #3 (H) | | | | | | | | | |
| 167. - First Eagle Global Funds Class I | A | Dividend | J | T | | | | | |
| 168. | | | | | Sold (part) | 11/23/22 | J | A | |
| 169. - The Income Fund of America Fund Class F2 | A | Dividend | J | T | | | | | |
| 170. | | | | | Sold (part) | 11/23/22 | J | A | |

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

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

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

| Name of Person Reporting | Date of Report |
|---|---|
| **Stranch, Jane B.** | 05/12/2023 |

## 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 | 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) | |
| 171. - Loomis Sayles Global Equity and Income Fund CL Y | B | Dividend | J | T | | | | | |
| 172. | | | | | Sold (part) | 11/23/22 | J | A | |
| 173. - Thornburg Income Builder CL I | A | Dividend | J | T | | | | | |
| 174. | | | | | Sold (part) | 11/23/22 | J | A | |
| 175. - Victory Trivalent Int'l Sm Cap | A | Dividend | J | T | | | | | |
| 176. | | | | | Sold (part) | 11/23/22 | J | | |
| 177. - Alpha Centric Inc. Opport Fund Class A | A | Dividend | | | | | | | |
| 178. | | | | | Sold (part) | 11/23/22 | J | | |
| 179. | | | | | Sold | 12/22/22 | J | | |
| 180. - UBS Bank USA Deposit Account | | | J | T | | | | | |
| 181. -Firsthand Tech Opp Fund | B | Dividend | J | T | | | | | |
| 182. | | | | | Buy (add'l) | 03/24/22 | J | | |
| 183. | | | | | Sold (part) | 11/12/22 | J | | |
| 184. -Pimco Income Fund Class 12 | A | Dividend | K | T | | | | | |
| 185. | | | | | Sold (part) | 11/23/22 | J | | |
| 186. | | | | | Buy (add'l) | 12/22/22 | J | | |
| 187. -Virtus Small Cap Class 1 | A | Dividend | J | T | | | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
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| | 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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| | 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 | 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) | |
| 188. | | | | | Sold (part) | 11/23/22 | J | A | |
| 189. -Blackrock Health Sciences Fund Institutional Class | A | Dividend | J | T | | | | | |
| 190. | | | | | Sold (part) | 03/25/22 | J | A | |
| 191. | | | | | Sold (part) | 11/23/22 | J | A | |
| 192. -Cohen & Steers Real Est Sec Fund | A | Dividend | J | T | | | | | |
| 193. | | | | | Sold (part) | 11/23/22 | J | | |
| 194. -Vanguard Indust ETF | A | Dividend | | | Sold | 10/17/22 | J | | |
| 195. -Hartford Strategic Inc. Fund CL 1 | A | Dividend | J | T | | | | | |
| 196. | | | | | Buy (add'l) | 12/22/22 | J | | |
| 197. | | | | | Sold (part) | 11/23/22 | J | | |
| 198. -T. Rowe Price Finc Svc Fund | A | Dividend | J | T | | | | | |
| 199. | | | | | Buy (add'l) | 03/24/22 | J | | |
| 200. | | | | | Sold (part) | 11/23/22 | J | | |
| 201. -Neuberger Berman Lq Cap Value Fund | A | Dividend | K | T | | | | | |
| 202. | | | | | Sold (part) | 11/23/22 | J | | |
| 203. -Energy Select Sector SPDR Fund ETF | A | Dividend | J | T | Buy | 10/07/22 | J | | |
| 204. | | | | | Sold (part) | 11/25/22 | J | A | |

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

| Name of Person Reporting | Date of Report |
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| **Stranch, Jane B.** | 05/12/2023 |

## 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 | 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) | |
| 205. -Delaware Diversified FLTG RATE CL 1 | | None | J | T | Buy | 12/22/22 | J | | |
| 206. IRA #4 (H) | | | | | | | | | |
| 207. - First Eagle Global Funds Class I | A | Dividend | J | T | | | | | |
| 208. - The Income Fund of America Fund Class F2 | A | Dividend | J | T | | | | | |
| 209. - Loomis Sayles Global Allocation Fund Class Y | A | Dividend | J | T | | | | | |
| 210. - Thornburg Income Builder Class I | A | Dividend | J | T | | | | | |
| 211. -Victory Trivalent Int'l Small Cap Fund Class Y | A | Dividend | J | T | | | | | |
| 212. -UBS Bank USA Deposit Account | | None | J | T | | | | | |
| 213. -Pimco Income Fund Class 12 | A | Dividend | J | T | | | | | |
| 214. | | | | | Buy (add'l) | 12/21/22 | J | | |
| 215. -Alpha Cenetric Inc. Opportunities Fund | A | Dividend | | | Sold | 12/21/22 | J | | |
| 216. -Virtus Kar Small Cap Core Fund | A | Dividend | J | T | | | | | |
| 217. -Blackrock Health Sciences Fund Institutional Class | A | Dividend | J | T | | | | | |
| 218. | | | | | Sold (part) | 03/24/22 | J | A | |
| 219. -Cohen & Steers Real Est Sec Fund | A | Dividend | J | T | | | | | |
| 220. -Firsthand Tech Opp Fund | A | Dividend | J | T | | | | | |
| 221. | | | | | Buy (add'l) | 03/24/22 | J | | |

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

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

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

| Name of Person Reporting | Date of Report |
|---|---|
| **Stranch, Jane B.** | 05/12/2023 |

## 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 | 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) | |
| 222. -Hartford Strategic Inc Fund CL 1 | A | Dividend | J | T | | | | | |
| 223. -T. Rowe Price Fin Svc Fund | A | Dividend | J | T | | | | | |
| 224. | | | | | Buy (add'l) | 03/24/22 | J | | |
| 225. -Neuberger Berman Lq Cap Value Fund | A | Dividend | K | T | | | | | |
| 226. -Vanguard Industrials ETF | A | Dividend | | | Sold | 10/17/22 | J | | |
| 227. -Energy Select Sector SPDR Fund ETF | A | Dividend | J | T | Buy | 10/31/22 | J | | |
| 228. -Delaware Diversified Floating Rate Class 1 | | None | J | T | Buy | 12/22/22 | J | | |
| 229. Estate #2 (H) | | | | | | | | | |
| 230. -Pinnacle Bank Account | | None | J | T | | | | | |
| 231. Trust #1 (H) G-S Trust | | | | | | | | | |
| 232. -UBS Bank USA Deposit Account | A | Interest | J | T | | | | | |
| 233. -Blackrock Health Sciences Fund Institutional Class | B | Dividend | K | T | | | | | |
| 234. | | | | | Sold (part) | 03/25/22 | J | A | |
| 235. -Touchstone Inv Mid Cap Class Y | A | Dividend | K | T | | | | | |
| 236. -Victory Trivalent Int'l Small Cap Fund Class Y | A | Dividend | K | T | | | | | |
| 237. -Alger Spectra Class Z | A | Dividend | K | T | | | | | |
| 238. -Alpha Centric Income Opport Class I | B | Dividend | | | Sold | 12/22/22 | K | | |

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

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

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

| Name of Person Reporting | Date of Report |
|---|---|
| **Stranch, Jane B.** | 05/12/2023 |

## 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 | 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) | |
| 239. -Nuveen Short Duration Hy Muni Bnd Class I | B | Dividend | K | T | | | | | |
| 240. -First Eagle Global Funds Class I (X) | B | Dividend | K | T | | | | | |
| 241. -Janus Henderson Bal Class I | A | Dividend | K | T | | | | | |
| 242. -Loomis Sayles Global Allocation Fund Class Y | B | Dividend | K | T | | | | | |
| 243. -Thornburg Income Builder Class I | B | Dividend | K | T | | | | | |
| 244. -8012 Nashville TN Appraisal 11-3-17 | | None | O | Q | | | | | |
| 245. -Land Nashville TN Appraisal 2-8-18 | | None | L | Q | | | | | |
| 246. -Rental property Nashville TN Appraisal 2-22-18 | D | Rent | M | Q | | | | | |
| 247. -24.75% owner BL Partners, Nashville, TN | A | Interest | N | W | | | | | |
| 248. -CapStar Financial Holdings, Inc. Stock | A | Dividend | K | T | | | | | |
| 249. | | | | | Sold (part) | 12/29/22 | K | D | |
| 250. -Cohen & Steers Real Est Sec Fund | B | Dividend | J | T | | | | | |
| 251. -BF Partners 5.62% | A | Interest | N | W | | | | | |
| 252. -Firsthand Tech Opp Fund | B | Dividend | J | T | | | | | |
| 253. | | | | | Buy (add'l) | 03/25/22 | J | | |
| 254. -Columbia Div Inc. Fund | B | Dividend | K | T | | | | | |
| 255. -Vanguard Industrials ETF | A | Dividend | | | Sold | 10/17/22 | J | | |

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

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

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

| Name of Person Reporting | Date of Report |
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| **Stranch, Jane B.** | 05/12/2023 |

## 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 | 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) | |
| 256. -Hartford Strategic Inc. Fund Cl 1 | A | Dividend | | | Sold | 03/04/22 | K | | |
| 257. -Vanguard Ultra-Short Term Bond Fund-Cl Admin | A | Dividend | J | T | | | | | |
| 258. | | | | | Sold (part) | 04/21/22 | L | | |
| 259. | | | | | Sold (part) | 12/29/22 | J | | |
| 260. -Virtus Newfleet Multi Sector Bond Fund CL 1 | A | Dividend | | | Sold | 12/16/22 | L | | |
| 261. -Energy Select Sector SPDR Fund ETF | A | Dividend | J | T | Buy | 10/13/22 | J | | |
| 262. -Delware Diversified Floating Rate Class 1 | | None | K | T | Buy | 12/21/22 | K | | |
| 263. -Fidelity Advisor Strategic Inc. Fund Class 1 | A | Dividend | K | T | Buy | 03/03/22 | K | | |
| 264. | | | | | Buy (add'l) | 12/21/22 | J | | |
| 265. -Lord Abbett Short Duration Inc. Fund Class F | | None | L | T | Buy | 12/15/22 | L | | |
| 266. College America 529 Cap Inc Bldr CIB A | | None | J | T | | | | | |
| 267. BL Partners, Nashville, TN | A | Interest | J | W | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| 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 |
|---|---|
| **Stranch, Jane B.** | 05/12/2023 |

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

All Part VII, references by line listed below:

1. Line 14, John Hancock USA Pension Plan #2 continuing through Line 36 contain units in a pooled investment account that is controlled by and held in the custody of John Hancock. No information is maintained at the participant level that applies to Column B and Column D(4) of this report.

2. Line 40, John Hancock USA Pension Plan #4 continuing through Line 156 is for spouse and contain units in a pooled investment account that is controlled by and held in the custody of John Hancock. No information is maintained at the participant level that applies to Column B and Column D(4) of this report.

Part I - Positions -

Line 4 - Co-Trustee G-G Trust - No Ownership. In accordance with page 31 of the filing instructions, assets of the trust are not required to be reported in Part VII as the filer and her spouse, who have no dependent children, did not receive income from the trust, have no beneficial interest in principal or income from the trust and were not involved in the creation of the trust.

| Name of Person Reporting | Date of Report |
|---|---|
| **Stranch, Jane B.** | 05/12/2023 |

## 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/ Jane B. Stranch**

**NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 13106)**

Committee on Financial Disclosure
Administrative Office of the United States Courts
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