AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT
FINAL FILING

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
White, Helene N.	6th Circuit	08/15/2024
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
Circuit Judge (Active)	☐ Nomination Date ☐ Initial ☐ Annual ☑ Final **5b.** ☑ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
Theodore Levin Courthouse 231 W. Lafayette Blvd., Room 649 Detroit, Michigan 48226		

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	NJH Associates
2.	Partner	NJHA Associates
3.	Partner	RNJH Associates, LTD
4.	Director / Vice President	RNJH Associates, Inc.
5.	Trustee	Trust #2 [redacted] GST A
6.	Trustee	Trust #3 [redacted] GST B
7.	Director / President	[redacted] #1
8.	Custodian	Brokerage account #1 [redacted]
9.	Custodian	Brokerage account #2 [redacted]
10.	Member	Home Properties, LLC
11.	Manager/ Member	WWLFAP, LLC
12.	Manager/Member	HBF Investments, LLC
13.	Member	Clay School, LLC
14.	Manager/Member	Unit 610, LLC
15.	Member	[redacted] Ventures, LLC

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White, Helene N.	08/15/2024

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. Pension	Date: 2022 Wayne County, Michigan Judicial Pension
2. Pension	Date: 2022 State of Michigan Judicial Pension
3.	

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

A. Filer's Non-Investment Income

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

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

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

(Dollar amount not required except for honoraria.)

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

	DATE	SOURCE
1.		
2.		
3.		
4.		

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

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

V. GIFTS. *(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

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

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☐ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.	Bank of America	Mortgage on real estate	P1
2.	2010 Trust	Promissory Notes	P1
3.	Bank of America Private Bank f/n/a US Trust	Line of Credit	P1
4.	Tri-state	Line of Credit	P1
5.	Bank of America	Mortgage on Real Estate	P1

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1. Brokerage account #1 (UBS) (H)									
2. - American Funds Balanced Fund class B	A	Dividend	J	T					
3. - UBS money market	A	Interest	J	T					
4. Brokerage account #2 (Baird) (H)									
5. - Baird FDIC Insured Deposit 9999583 (cash)	A	Interest	L	T					
6. - ORCL	A	Dividend	L	T					
7. - VAFAX	A	Dividend	J	T					
8. - BTZ	B	Dividend	K	T					
9. - FRDPX	D	Dividend	L	T					
10. - SLMCX	B	Dividend	N	T					
11. - SCAUX	B	Dividend	K	T					
12. - FIF	B	Dividend	K	T					
13. Brokerage account #3 (Baird) (H)									
14. - NWS	A	Dividend	J	T					
15. - FOX	A	Dividend	J	T					
16. - SCAUX	B	Dividend	K	T					
17. - FRDPX	D	Dividend	M	T					

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

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White, Helene N.	08/15/2024

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
18. - PHSTX	A	Dividend	K	T					
19. - DIS	A	Dividend	K	T					
20. Brokerage account #4 cust [redacted] A (Baird) (H)									
21. - ABALX	A	Dividend	J	T					
22. - VAFAX	B	Dividend	J	T					
23. - FRBAX	A	Dividend	J	T					
24. - SCAUX	A	Dividend	J	T					
25. Brokerage account #5 cust [redacted] B (Baird) (H)									
26. - VAFAX	B	Dividend	K	T					
27. - ABALX	B	Dividend	K	T					
28. Brokerage account #6 (Chase) (H)									
29. - MJLXX	A	Interest	J	T					
30. - FPFC		None	J	T					
31. - GCVRZ (f/n/a GENZ)		None	J	T					
32. - MSFT	A	Dividend	J	T					
33. Brokerage account #8 (Ameriprise) (H)									
34. - Ameriprise Money Market Account	A	Interest	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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35. - GE	A	Dividend	K	T					
36. - ASEI	A	Dividend	J	T					
37. - RCMT		None	J	T					
38. - SPLV	A	Dividend	J	T					
39. Brokerage account #9 (Oppenheimer) (H)									
40. - MRVL	A	Int./Div.	J	T					
41. 401k and 457 State of Michigan									
42. - SSga S&P 500 Index		None	M	T					
43. - SSga MidCap Index		None	N	T					
44. - SSga Russel 2000 Index		None	N	T					
45. - Amer Funds Euro/Pac Gr		None	M	T					
46. Wayne County Deferred Comp (H)									
47. - Lord Abbott Mid Cap Fd		None	K	T					
48. RNJH Assoc. Ltd. Parnter (see lines 55-78)	E	Int./Div.	N	U					
49. Great Plains Energy Stock	A	Dividend	J	T					
50. Marc Pharmaceutical stock		None	J	T					
51. Trust #2[redacted] GST A, Trustee -assets listed on lines52&55-78	E	Int./Div.	N	U					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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52. - LP Int RNJH Asso. LTD - see lines 55-78 (H)									
53. Trust #3 [redacted] GST B, Trustee -assets listed on lines54&55-78	E	Int./Div.	N	U					
54. - LP Int RNJH Asso. LTD - see lines 55-78 (H)									
55. RNJH Associates Ltd. (LP Interest) (pro rata share) (H)									
56. - Acct # 1 Morgan Stanley - US Dollar equivalent cash acct	A	Int./Div.	L	T					
57. - - IShares Core US Aggregate	A	Int./Div.			Sold	05/18/22	L		
58. - - IShares JP Morgan EM Bond Fd	A	Int./Div.			Sold	05/13/22	K		
59. - - IShares S&P Mid Cap 400 Growth	A	Int./Div.	K	T					
60. - - IShares Sm Cap 600 Growth	A	Int./Div.	L	T					
61. - - Janus Henderson Sht Dur Inc ETF	D	Int./Div.	M	T					
62. - - JPM Diversified RET Intl EQ	B	Int./Div.	L	T					
63. - - JPMorgan Equity Premium INCO	C	Int./Div.	K	T	Buy	05/13/22	K		
64. - - JPMorgan Ultra-Short Inc ETF	C	Int./Div.	M	T					
65. - - Proshares TR S&P 500 DV ARIST (NOBL)	B	Int./Div.	M	T					
66. - - Proshares RSL 2000 DVD ETF	B	Int./Div.	L	T					
67. - - Vanguard FDSE Emerging Markets (VWO)	C	Int./Div.	L	T					
68. - - Vanguard Growth ETF (VUG)	A	Int./Div.	L	T					

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69. - - Vanguard High Div Yield ETF	C	Int./Div.	M	T					
70. - - Vanguard Index Funds S&P 500 ETF	C	Int./Div.	M	T					
71. - - Vanguard Mid Cap Value ETF	B	Int./Div.	L	T					
72. - Hardig Loevner Intl Equity Inst	C	Int./Div.	M	T					
73. - - JPMorgan Hedged Equity I	B	Int./Div.	M	T					
74. - - Victoryshares US Large Cap H	B	Int./Div.	L	T					
75. - - American Balanced F2 (AMBFX)	A	Int./Div.	L	T					
76. - - Franklin K2 Alternative Strtgs ADV (FABZX)	A	Int./Div.			Sold	01/31/22	L		
77. - - Janus Henderson Flexible Bond I (JFLEX)	B	Int./Div.	L	T					
78. - -PGIM Core Bon Z	B	Int./Div.	L	T	Buy	10/31/22	L		
79. Trust #5[redacted] shared beneficial interest (lines 80-296)									
80. - Wells Fargo Acct #1 (H)									
81. - - Wells Fargo Bank deposit FDIC Insured Cash Cert #27389	A	Interest	J	T					
82. - - Cheniere Energy Inc	A	Int./Div.	J	T					
83. - - Crestwood Equity Partners LP	A	Int./Div.	J	T	Buy	10/13/22	J		
84. - - DSCP Midstream LP	A	Int./Div.	J	T					
85. - - EQT Midstream Partners, LP	A	Int./Div.			Sold	01/06/22	J		

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86. - - Kinder Morgan Inc DEL	A	Int./Div.	J	T	Buy	04/07/22	J		
87. - - Enbridge Energy Partners, LP	A	Int./Div.	J	T					
88. - - Energy Transfer Partners LP	C	Int./Div.	K	T					
89. - - Enlink Midstream LLC	A	Int./Div.	J	T	Buy	10/13/22	J		
90. - - Enterprise Prods Partners, LP	B	Int./Div.	K	T					
91. - - MPLX LP Com	A	Int./Div.	J	T					
92. - - Magellan Midstream Partners, LP	A	Int./Div.	J	T					
93. - -Nustar Energy LP	A	Int./Div.			Sold	12/07/22	J		
94. - - Pembina Pipeline Corp	A	Int./Div.	J	T					
95. - - Plains All American Pipeline LP	B	Int./Div.	K	T					
96. - - Plains GP Hldgs LP	A	Int./Div.	J	T					
97. - - Targa Res Corp Com	A	Int./Div.	J	T					
98. - - TC Energy Corp	A	Int./Div.	J	T					
99. - - Western Midstream Partners LP	A	Int./Div.	J	T					
100. - - Williams Companies, Inc.	B	Int./Div.	K	T					
101. - Wells Fargo Acct #2									
102. - - Wells Fargo Bank deposit FDIC Insured Cash Cert #27389	A	Int./Div.	J	T					

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103. - - Abbvie, Inc.	A	Int./Div.	K	T					
104. - - Amcor PLC	A	Int./Div.	J	T	Buy	04/27/22	J		
105. - - American Electric Power	A	Int./Div.	J	T					
106. - - Amgen, Inc.	A	Int./Div.	J	T					
107. - - AT&T, Inc.	A	Int./Div.	K	T					
108. - - BCE, Inc.	A	Int./Div.	J	T					
109. - - Bristol Myers Squibb	A	Int./Div.			Sold	02/11/22	J	A	
110. - - British Amern TOB PLC	A	Int./Div.	J	T					
111. - - CDN Imperial Bk Commrc	A	Int./Div.	J	T					
112. - - Chevron Corp	A	Int./Div.			Sold	12/02/22	K	C	
113. - - Cisco Systems, Inc.	A	Int./Div.	J	T	Buy	05/25/22	J		
114. - - Clorox Company	A	Int./Div.	J	T	Buy	02/22/22	J		
115. - -Coca Cola Company	A	Int./Div.			Sold	02/11/22	J	A	
116. - - Conagra Brands Inc	A	Int./Div.	J	T					
117. - - Crown Castle Intl	A	Int./Div.	J	T					
118. - - Digital Realty Trust Inc	A	Int./Div.	J	T					
119. - - Dominion Res Inc. VA (n/k/a Dominion Energy Inc.)	A	Int./Div.	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
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Name of Person Reporting	Date of Report
White, Helene N.	08/15/2024

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
120. - - Duke Energy Corp	A	Int./Div.	K	T					
121. - - Enbridge Inc.	A	Int./Div.	J	T					
122. - - Exxon Mobil Corp	A	Int./Div.			Sold	11/01/22	K	C	
123. - - Gilead Sciences Inc.	A	Int./Div.	J	T				A	
124. - - General Mills Inc.	A	Int./Div.			Sold	08/16/22	J		
125. - - HuntingtonBancshares Inc.	A	Int./Div.	J	T					
126. - - JPMorgan Chase & Co	A	Int./Div.	J	T	Buy	08/16/22	J		
127. - - Keycorp New	A	Int./Div.	J	T	Buy	05/25/22	J		
128. - - Kimberly-Clark Corp	A	Int./Div.	J	T					
129. - - Lyondellbasell Industries	A	Int./Div.	J	T	Buy	11/01/22	J		
130. - - Medtronic PLC	A	Int./Div.	J	T	Buy	11/01/22	J		
131. - - Lockheed Martin Corp	A	Int./Div.			Sold	01/20/22	J	A	
132. - - Merck & Co, Inc.	A	Int./Div.	J	T					
133. - - National Grid PLC	A	Int./Div.	J	T					
134. - - Pepsico Inc.	A	Int./Div.			Sold	01/20/22	J	A	
135. - - Pfizer Inc.	A	Int./Div.	K	T					
136. - - Philip Morris Intl	A	Int./Div.	K	T					

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White, Helene N.	08/15/2024

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

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

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137. - - PNC Financial Services Group	A	Int./Div.	J	T	Buy	04/11/22	J		
138. - - PPL Corp	A	Int./Div.	J	T					
139. - - Public Service Enterprise Group	A	Int./Div.			Sold	04/27/22	J	A	
140. - - Realty Income Corp	A	Int./Div.	J	T					
141. - - Regions Financial Corp	A	Int./Div.			Sold	02/22/22	J	A	
142. - - Southern Company	A	Int./Div.	J	T					
143. - - Total Energies SE	A	Int./Div.	J	T					
144. - - TC Energy Corp	A	Int./Div.	J	T					
145. - - Truist Financial Corp	A	Int./Div.	J	T					
146. - - Unilever PLC Spons ADR	A	Int./Div.	J	T					
147. - - United Parcel Service - B UPS	A	Int./Div.	J		Buy	06/14/22	J		
148. - - US Bankcorp New	A	Int./Div.	J	T					
149. - - Verizon Communications	B	Int./Div.	K	T					
150. - - Vodafone Group PLC New	A	Int./Div.	J	T					
151. - - Walgreens Boots Alliance Inc	A	Int./Div.	J	T					
152. - - Williams Companies	A	Int./Div.	J	T					
153. - - 3M Co	A	Int./Div.			Sold	02/22/22	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
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White, Helene N.	08/15/2024

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

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
154. - Wells Fargo Acct #3 Bank FDIC Insured Cash Cert#27389	A	Interest	J	T					
155. - - A O Smith	A	Int./Div.	J	T					
156. - - Abbott Laboratories	A	Int./Div.	J	T					
157. - - Abbvie Inc.	A	Int./Div.	J	T	Buy	06/23/22	J		
158. - - Air Products & Chemicals	A	Int./Div.	J	T	Buy	06/07/22	J		
159. - - Alcon Inc.		None	J	T					
160. - - Alexandria Real Estate REIT Equities Inc	A	Int./Div.	J	T	Buy	10/26/22	J		
161. - - American Express Company	A	Int./Div.	J	T					
162. - - American Tower Corp	A	Int./Div.	J	T	Buy	03/17/22	J		
163. - - Analog Devices, Inc.	A	Int./Div.	J	T					
164. - -Apple, Inc.	A	Int./Div.	J	T					
165. - - Berkley WR Corp.	A	Int./Div.	J	T					
166. - -Berkshire Hathaway Inc. Ser B	A	Int./Div.	J	T					
167. - - Boeing Co	A	Int./Div.	J	T					
168. - - Booz Allen Hamilton Holding Co	A	Int./Div.	J	T					
169. - - Boston Scientific Corp		None	J	T					
170. - - BWX Technologies Co	A	Int./Div.	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
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J =$15,000 or less
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M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
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White, Helene N.	08/15/2024

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

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171. - - CBOE Global Markets	A	Int./Div.	J	T					
172. - - Chevron Corp.	A	Int./Div.	J	T	Buy	02/15/22	J		
173. - - Chubb Ltd	A	Int./Div.	J	T					
174. - - Citigroup, Inc. NEW	A	Int./Div.			Sold	01/14/22	J		
175. - - Clarivate PLC	A	Int./Div.			Sold	01/21/22	J		
176. - - Comcast Corp. New CL A	A	Int./Div.	J	T					
177. - - Corteva Inc.	A	Int./Div.	J	T					
178. - - Crown Holdings Inc	A	Int./Div.	J	T					
179. - - CVS Health Corp	A	Int./Div.	J	T	Buy	01/14/22	J		
180. - - Diageo PLC	A	Int./Div.	J	T	Buy	09/30/22	J		
181. - - Diamondback Energy Inc.	A	Int./Div.	J	T	Buy	03/01/22	J		
182. - - Disney Walt Company	A	Int./Div.	J	T					
183. - - Dollar General Corp	A	Int./Div.	J	T					
184. - - Eaton Corp PLC	A	Int./Div.	J	T					
185. - - Entergy Corp New	A	Int./Div.	J	T					
186. - - First American Finl Corp	A	Int./Div.	J	T					
187. - - First Republic Bank San Francisco Calif	A	Int./Div.	J	T	Buy	06/06/22	J		

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White, Helene N.	08/15/2024

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188. - - FISERVE Inc.		None	J	T					
189. - - Franco-Nevada Corp	A	Int./Div.	J	T					
190. - - Gartner Inc.	A	Int./Div.			Sold	01/25/22	J	C	
191. - - GXO Logistics	A	Int./Div.			Sold	06/07/22	J		
192. - - Hudson Pacific PPTYS	A	Int./Div.			Sold	03/17/22	J		
193. - - Humana Inc.	A	Int./Div.			Sold	03/17/22	J		
194. - - Huntsman Corp	A	Int./Div.			Sold	01/20/22	J		
195. - - IdaCorp Inc.	A	Int./Div.	J	T					
196. - - JPMorgan Chase & Co	A	Int./Div.	J	T					
197. - - Johnson & Johnson	A	Int./Div.	J	T					
198. - - Lamar Advertising Co	A	Int./Div.	J	T					
199. - - Lockheed Martin Corp	A	Int./Div.	J	T	Buy	03/10/22	J		
200. - - Lauder Estee Cos Inc.	A	Int./Div.			Sold	01/21/22	J		
201. - - Lowes Companies Inc.	A	Int./Div.	J	T					
202. - - M&T Bank Corp	A	Int./Div.	J	T					
203. - - Marathon Petroleum corp	A	Int./Div.	J	T					
204. - - Marriott Intl Inc New		None			Sold	03/10/22	J		

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205. - - McKesson Corp	A	Int./Div.	J	T	Buy	12/20/22	J		
206. - - Medtronic PLC	A	Int./Div.	J	T					
207. - - Meta Platforms Inc.		None			Sold	04/22/22	J		
208. - - Microsoft Corp	A	Int./Div.	J	T					
209. - - Mondelez Intl Inc	A	Int./Div.	J	T					
210. - - Nextera Energy Inc.	A	Int./Div.	J	T	Buy	03/10/22	J		
211. - - Otis Worldwide Corp	A	Int./Div.	J	T	Buy	06/06/22	J		
212. - - Parker-Hannifin Corp	A	Int./Div.	J	T	Buy	01/14/22	J		
213. - - Paypal Holdings Inc.	A	Int./Div.			Sold	02/15/22	J		
214. - - Pepsico Inc.	A	Int./Div.	J	T					
215. - -PNC Financial Services	A	Int./Div.	J	T					
216. - - Proctor & Gamble Co.	A	Int./Div.	J	T					
217. - - Progressive Corp Ohio	A	Int./Div.	J	T					
218. - - Raytheon Technologies Corp	A	Int./Div.	J	T					
219. - - Ross Stores Inc.	A	Int./Div.			Sold	01/14/22	J		
220. - - Salesforce Inc.	A	Int./Div.	J	T	Buy	06/07/22	J		
221. - - Shell PLC	A	Int./Div.	J	T	Buy	04/19/22	J		

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222. - - SS&C Technologies	A	Int./Div.	J	T					
223. - - TE Connectivity Ltd	A	Int./Div.	J	T					
224. - - Trance Technologies PLC	A	Int./Div.	J	T	Buy	10/26/22	J		
225. - - TEX PAC Land TR	A	Int./Div.			Sold	01/14/22	J		
226. - - Ulta Beauty Inc.		None	J	T					
227. - - Unitedhealth Group	A	Int./Div.	J	T	Buy	03/01/22	J		
228. - - Visa, Inc.	A	Int./Div.	J	T	Buy	02/15/22	J		
229. - - Wal-Mart Stores, Inc.	A	Int./Div.	J	T					
230. - - Willis Towers Watson	A	Int./Div.	J	T					
231. - - XPO Logistics Inc.		None			Sold	06/07/22	J		
232. - - Zimmer Biomet Holdings Inc.	A	Int./Div.			Sold	01/14/22	J		
233. - Wells Fargo Account #4 (H)									
234. - - Wells Fargo Bank deposit FDIC Insured Cert #27389	A	Interest	J	T					
235. - - Alphabet Inc CL A		None	J	T					
236. - - Amphenol Corp	A	Int./Div.	J	T					
237. - - Apple Inc.	A	Int./Div.	J	T					
238. - - Adobe Systems, Inc.		None	J	T	Buy	01/26/22	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
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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239. - - Amazon Inc.		None	J	T	Buy	08/30/22	J		
240. - - Autodesk Inc		None	J	T					
241. - - Booking Holdings Inc.	A	Int./Div.	J	T					
242. - -Broadridge Financial Solutions	A	Int./Div.			Sold	02/22/22	J	C	
243. - - Cintas Corp	A	Int./Div.	J	T					
244. - - Citrix Systems Inc.	A	Int./Div.			Sold	01/26/22	J		
245. - - Constellation Brands Inc. CL A		None	J	T					
246. - - Copart, Inc.		None	J	T					
247. - - Disney Walt Company	A	Int./Div.	J	T					
248. - - Facebook, Inc. CL A		None			Sold	11/07/22	J		
249. - - Fiserve Inc.		None	J	T					
250. - - Fleetcor Technologies		None	J	T					
251. - - Fortune Brands Home & Security	A	Int./Div.	J	T					
252. - - GoDaddy Inc. CL A		None	J	T					
253. - - Idexx Laboratories Inc.		None	J	T	Buy	11/07/22	J		
254. - - Intuit Inc.	A	Int./Div.	J	T					
255. - - Lowes Companies, Inc.	A	Int./Div.	J	T					

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256. - - Markel Corp		None	J	T					
257. - - Mastercard Inc. CL A	A	Int./Div.	J	T					
258. - - Match Group, Inc.		None	J	T					
259. - - Meta Platforms, Inc.		None			Sold	10/28/22	J		
260. - - Napco Security Technologies		None	J	T					
261. - - Nvidia Corp	A	Int./Div.	J	T					
262. - - Paypal Holdings	A	Int./Div.	J	T					
263. - - S&P Global, Inc.	A	Int./Div.	J	T					
264. - - Sherwin Williams Co.	A	Int./Div.	J	T					
265. - - Steris PLC	A	Int./Div.			Sold	11/01/22	J	B	
266. - - Take-Two Interactive Software		None	J	T					
267. - - Teleflex Inc.	A	Int./Div.	J	T					
268. - - Thermo Fisher Scientific Inc.	A	Int./Div.	J	T					
269. - - TJX Cos Inc. New	A	Int./Div.	J	T					
270. - - United Healthcare Group	A	Int./Div.	J	T	Buy	11/07/22	J		
271. - - Zebra Technologies Corp		None	J	T					
272. - Morgan Stanley Brokerage Account (H)									

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273. - - Morgan Stanley Private Bank Cash Acct #061871976	A	Interest	K	T					
274. - - IShares Core US Aggregate	A	Dividend			Sold	10/31/22	J		
275. - - Harding Loevner Intl Equity Inst	A	Dividend	L	T					
276. - - IShares JP Morgan EM Bond Fd	A	Dividend			Sold	05/13/22	J		
277. - - IShares S&P Sm Cap 600 Val	A	Dividend	K	T					
278. - - IShares S&P Mid Cap 400 Growth	A	Dividend	K	T					
279. - - Janus Henderson Sht Dur Inc ETF	A	Dividend	K	T					
280. - - JPMorgan Equity Premium INCO	B	Dividend	J	T	Buy	05/13/22	J		
281. - - JPM Diversified RET Intl EQ	A	Dividend	K	T					
282. - - JPMorgan Ultra-Short Inc ETF	A	Dividend	K	T					
283. - - Proshares TR S&P 500 DV ARIST (NOBL)	A	Dividend	K	T					
284. - - Proshares RSL 2000 DVD ETF	A	Dividend	K	T					
285. - - Vanguard FTSE Emerging Markets	A	Dividend	K	T					
286. - - Vanguard Growth ETF	A	Dividend	L	T					
287. - - Vanguard High Div Yield ETF	A	Dividend	K	T					
288. - - Vanguard Index Funds S&P 500 ETF	B	Dividend	L	T					
289. - - Vanguard Mid Cap Value ETF	A	Dividend	K	T					

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290. - - VictoryShares US Larg Cap	B	Dividend	K	T					
291. - - American Balanced F2	A	Dividend	J	T					
292. - - Franklin K2 Alternative Strtgs ADV	A	Dividend			Sold	01/31/22	J		
293. - - Janus Henderson Flexible Bond I (JFLEX)	A	Dividend	K	T					
294. - - JPMorgan Hedged Equity I	A	Dividend	J	T					
295. - - PGIM Core Bond Z	A	Dividend	K	T	Buy	10/31/22	K		
296. - - Symetra Life Insurance Policy - Universal Life	C	Interest	M	T					
297. NJH Associates, Partner (New York, NY) BOFA Acct	A	Interest	L	T					
298. - BJW Associates Real Estate NY, NY	G	Rent	P1	W					
299. - First Sutton Assoc Real Estate NY, NY	C	Rent	K	W					
300. - Asbury Plaza Venture, Real Estate, Chicago, IL	E	Rent	O	W					
301. - Lincoln Terrace Assoc. NY, NY	E	Rent	L	W					
302. 2001 Trust, shared beneficial interest (H)									
303. - - JPMorgan US Dollar cash deposit	D	Interest	O	T					
304. - - PEG Digital Growth Fund II, LP	F	Int./Div.	N	T					
305. - - Apollo EPF III Private Investors LLC	B	Int./Div.	M	U					
306. - - Kona III Private Investors, LLC	E	Int./Div.	N	U					

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307. - - PEG Secondary Private Equity Investors III LP	C	Int./Div.	M	T					
308. - - PEG Secondary Private Equity Investors LLC	B	Int./Div.	L	U					
309. - - SLP V Private Investors LLC		None	M	U					
310. - Vintage 2014 Private Investments, LLC	B	Int./Div.	M	U					
311. 2007 Trust, shared beneficial interest (H)									
312. - - JPMorgan US Dollar cash deposit	A	Interest	N	T					
313. - - AP IXZ (APAX) Private Investors	D	Int./Div.	N	T					
314. - - Apollo EPF III Private Investors LLC	D	Int./Div.	M	U					
315. - - PEG Secondary Private Equity Investors, LLC	D	Int./Div.	M	U					
316. LTR 2010 Trust, shared beneficial interest-lines 317-856 (H)									
317. - - NADG NNN Property Fund	E	Int./Div.	M	T					
318. - - NADG US Supermarket Anchored Fund	G	Int./Div.	O	T					
319. - - NADG Real Estate Opportunity Fund	F	Dividend	M	T					
320. - - Ann Arbor Realty Ventures, LP	A	Interest	K	T					
321. - - Suvola Corp.		None	L	T					
322. - - Lincoln Life Ins Policy;Variable Life (H)									
323. - - - LVIP Vanguard Domestic Equity (789)	A	Int./Div.	K	T					

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324. - - - -AM Fds Growth-Inc Fund (C2) (853)	A	Int./Div.	K	T					
325. - - - Del VIP REIT Series (Std Cls) (856)	A	Int./Div.	K	T					
326. - - - LVIP GlobalMod Alloc MR SC (957)	A	Int./Div.	O	T					
327. - - Triarq Health Corp./Triarq Capital LLC		None	O	T					
328. - - Loans Receivable from [redacted] ([redacted] 2010 Trust)		None	P1	T					
329. - - NADG US Core Plus Acquisition Fund	G	Int./Div.	O	T					
330. - - Loan to Unit 610, LLC		None			Redeemed	03/31/22	N		
331. - - South University North, LLC	B	Distribution	K	U					
332. - - Eastham Capital Fund	E	Distribution	J	T					
333. - - Northern Trust checking acct		None	N	T					
334. - - Northern Trust Account closed									
335. - - *all assets transferred to Fidelity Accounts									
336. - 2010 TR - Fidelity Acct #1 (lines 337-423) (H)									
337. - - Fidelity Total Core Account (cash)	A	Interest	M	T	Open	04/04/22	M		
338. - - Alabama St Pub Sch & College Auth	A	Interest			Buy	05/26/22	L		
339. - - Alabama St Pub Sch & College Auth					Sold	06/09/22	L		
340. - - Atlanta GA Wtr & WasteWater Rev	A	Interest	L	T	Buy	06/01/22	L		

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341. - - Baltimore Cnty MD Pub Impt Bds	A	Interest			Sold	05/26/22	L		
342. - - Bartow Cnty GA Sch Dist GO Bds	A	Interest	L	T					
343. - - Bay Area Toll Auth Calif Toll Bridge	A	Interest			Sold	05/24/22	L		
344. - -Bergen Cnty NJ Bd Antic NTS	B	Interest			Redeemed	10/20/22	M		
345. - - Bristol Cnty Mass GO BDS	A	Interest	L	T	Buy	06/01/22	L		
346. - - Cabarrus Cnty NC Ltd Oblg	A	Interest	L	T	Buy	06/01/22	L		
347. - -California ST Var Purp GO Ref BDS	A	Interest			Sold	06/24/22	M		
348. - - Charleston Cnty SC GO REF BDS	A	Interest	L	T					
349. - - Clark Cnty Wash Pub Util Dist No 001	A	Interest	L	T	Buy	12/14/22	L		
350. - - Clarksville Tenn Elec Sys Rev	A	Interest	L	T	Buy	11/03/22	L		
351. - - Collin Cnty TEX LTD Tax Perm Impt	B	Interest	M	T					
352. - - Colorado St Bldg Excellen Schs	A	Interest	L	T					
353. - - Columbus GA Bldg Aut Lease Rev	A	Interest	M	T	Buy	11/17/22	L		
354. - - Columbus Ohio GO BDS	A	Interest	L	T	Buy	06/08/22	L		
355. - - Deer Park Tex Indpt Sch Dist	A	Interest	M	T	Buy	11/14/22	M		
356. - - Deschutes Cnty Ore Admin Sch	A	Interest			Sold	05/31/22	M		
357. - - El Paso Tex Wtr Swr Rev	A	Interest	L	T					

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358. - - Energy Northwest Wash Elec Rev		Interest			Sold	12/14/22	L		
359. - - Farmington Conn GO BDS Ser 2022	A	Interest			Sold	06/07/22	L		
360. - - Florida St Dept Trans Fed Ewy	A	Interest	L	T					
361. - - Georgia St GO Bds Ser 2017 A Tranche	A	Interest	L	T	Buy	12/08/22	L		
362. - - Georgetown Tex Comb Tax	A	Interest			Buy	08/08/22	L		
363. - - Georgetown Tex Comb Tax					Sold	11/17/22	M		
364. - - Hampton Roads Santn Dist VA Wastewater	A	Interest	L	T	Buy	12/08/22	L		
365. - - Hawaii St GO BDS Ser EZ	A	Interest	L	T					
366. - - Henrico Cnty VA GO Pub Impt Ref	A	Interest	L	T					
367. - - Honolulu Hawaii City & Cnty GO BDS	A	Interest	L	T	Buy	12/09/22	L		
368. - - Kansas City MO Wtr Rev Ref	A	Interest			Sold	12/09/22	L		
369. - - Las Vegas VY Nev Wtr Dist	A	Interest	L	T					
370. - - Lexington Cnty SC Sch Dist No 001 GO	A	Interest	M	T	Buy	12/12/22	M		
371. - - Louisville & Jefferson Cnty KY	A	Interest	M	T	Buy	06/24/22	M		
372. - - Madison Wis GO Ref BDS Ser 2022 C	A	Interest	L	T					
373. - - Maricopa Cnty Ariz Sch Dist No 3 Tempe	B	Interest	L	T					
374. - - Maryland St Bds Ser 2018	A	Interest	L	T	Buy	08/31/22	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)
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Name of Person Reporting	Date of Report
White, Helene N.	08/15/2024

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
375. - - Maryland St. Local Facs LN GO Bds	A	Interest			Sold	07/01/22	M		
376. - - Metropolitan St. Louis MO Swr Dist	A	Interest	L	T	Buy	06/08/22	L		
377. - - Midland Tex Tax and LTD Pledge	A	Interest	L	T					
378. - - Minnesota St. GO Trunk Hwy Bds	A	Interest			Sold	12/08/22	M		
379. - - Nevada St Hwy Impt Rev Bds	A	Interest	L	T					
380. - - New York City Transitional Fin	A	Interest	L	T	Buy	07/29/22	L		
381. - - New York NY GO Bds Ser 2008 L-6	A	Interest	L	T	Buy	12/09/22	L		
382. - - New York St Dorm Auth Sales Tax	A	Interest	L	T					
383. - - New York State Hsg Fin Agy Rev	B	Interest	M	T					
384. - - New York State Urban Dev Corp Rev	A	Interest			Sold	12/09/22	L		
385. - - North Carolina St Univ NC Raleigh	A	Interest	L	T					
386. - - North East Indpt Sch Dist Tex	A	Interest	L	T	Buy	06/06/22	L		
387. - - Ohio St Sch Gen Oblig Bnds Ser 2018	B	Interest			Sold	12/12/22	M		
388. - - Ohio St Wtr Dev Auth Rev Fresh Bds	A	Interest	L	T	Buy	07/01/22	L		
389. - - Okaloosa Cnty FL Sch Brd CTFS	A	Interest	L	T					
390. - - Orange Co FLA Sch Brd CTFS	A	Interest	L	T	Buy	10/24/22	L		
391. - - Overland Park Kans Internal Impt Ref	A	Interest			Sold	06/02/22	L		

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H1 =$1,000,001 - $5,000,000
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N =$250,001 - $500,000
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392. - - Pierce Cnty Wash Sch Dist No 003	A	Interest	L	T					
393. - - Port Beaumont Tex Nav Dist GO BDS	A	Interest	L	T					
394. - - Portland Ore Swr Sys Rev Second Lien Ref	A	Interest			Sold	08/08/22	M		
395. - - San Antonio Tex Wtr Rev Bds Ser 2019 A	B	Interest			Sold	06/07/22	M		
396. - - Sunrise FLA Spl Oblg Bds Mun	A	Interest	L	T	Buy	11/16/22	L		
397. - - University Houston Tex Univ Revs Sys	A	Interest	L	T	Buy	06/29/22	L		
398. - - Wake Co NC GO Ref BDS	A	Interest			Sold	12/08/22	M		
399. - - Washington ST Mtr Veh Fuel Tax GO	A	Interest	L	T					
400. - - Washington ST Various Purp GO BDS	A	Interest			Sold	07/29/22	L		
401. - - Washington SubN San Dist MD Cons	A	Interest	L	T					
402. - - Waukee Iowa GO Urban Renewal BDS	A	Interest	L	T	Buy	05/25/22	L		
403. - - West VA Commr of Hwys Spl Oblig	A	Interest	L	T					
404. - - Winston-Salem NC Wtr & Swr	A	Interest			Sold	08/31/22	L		
405. - - Wisconsin State Trans Rev Bds	B	Interest	M	T					
406. - 2010 TR - Fidelity Acct #2 (lines 407-797) (H)									
407. - - Fidelity Government Cash Reserves	A	Int./Div.	L	T	Open	04/06/22	K		
408. - - IShares TR Glb Infrastr ETF	A	Int./Div.	K	T					

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409. - - First DJ International RE	A	Int./Div.	K	T					
410. - - Allegion PLC Ord Shs	A	Dividend	J	T					
411. - - Amcor PLC Ord US	A	Dividend	J	T					
412. - -AON PLC Shs CL A Common	A	Dividend	J	T					
413. - -Accenture PLC	A	Dividend	J	T					
414. - - Eaton Corp PLC Com	A	Dividend	J	T					
415. - - Invesco Ltd	A	Dividend	J	T					
416. - - Linde PLC Com EUR	A	Dividend	J	T					
417. - - Medtronic PLC	A	Dividend	J	T					
418. - - APTIV PLC COM		None	J	T					
419. - - Nielsen Holdings PLC	A	Dividend			Sold	10/14/22	J		
420. - - Norwegian Cruse Line Hldg	A	Dividend	J	T					
421. - - NVENT Electric PLC	A	Dividend	J	T					
422. - - Pentair PLC	A	Dividend	J	T					
423. - - Seagate Tecnholding Holdings	A	Dividend	J	T					
424. - - Steris PLC	A	Dividend	J	T					
425. - - Trane Technologies PLC	A	Dividend	J	T					

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

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
426. - - Willis Towers Watson PLC	A	Dividend	J	T					
427. - -Chubb Limited Com NPV	A	Dividend	J	T					
428. - - TE Connectivity LTD Com	A	Dividend	J	T					
429. - - Lyondellbasell Industries	A	Dividend	J	T					
430. - - Royal Caribbean Group	A	Dividend	J	T					
431. - - AFLAC, Inc.	A	Dividend	J	T					
432. - - AES Corp	A	Dividend	J	T					
433. - - AT&T Inc.	A	Dividend	J	T					
434. - - Abbott Laboratories	A	Dividend	J	T					
435. - - Abbvie Inc.	A	Dividend	J	T					
436. - - Activision Blizzard Inc.	A	Dividend	J	T					
437. - - Adobe Systems Inc.	A	Dividend	J	T					
438. - - Advanced Micro Devices		None	J	T					
439. - - Agilent Technologies	A	Dividend	J	T					
440. - - Air Products and Chemicals	A	Dividend	J	T					
441. - - Alaska Air Group	A	Dividend	J	T					
442. - - Bread Financial Holdings Inc.	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

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Name of Person Reporting	Date of Report
White, Helene N.	08/15/2024

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

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443. - - Allstate Corp Com	A	Dividend	J	T					
444. - -Alphabet Inc. CL C		None	K	T					
445. - - Alphabet Inc. CL A		None	K	T					
446. - - Altria Group	A	Dividend	J	T					
447. - - Amazon.Com Inc.		None	K	T					
448. - - American Airlines Group	A	Dividend	J	T					
449. - - American Electric Power	A	Dividend	J	T					
450. - -American Express	A	Dividend	J	T					
451. - - American International Group	A	Dividend	J	T					
452. - - Amerisource Bergen Corp	A	Dividend	J	T					
453. - -Ametek Inc.	A	Dividend	J	T					
454. - - Amgen Inc.	A	Dividend	J	T					
455. - - Amphenol Corp CL A	A	Dividend	J	T					
456. - - Analog Devices Inc.	A	Dividend	J	T					
457. - - Elevance Health Inc.	A	Dividend	J	T	Buy	09/13/22	J		
458. - - Anthem Inc.	A	Dividend			Sold	06/01/22	J		
459. - - APA Corp	A	Dividend	J	T					

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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460. - - Apple Inc.	A	Dividend	M	T					
461. - - Applied Materials Inc.	A	Dividend	J	T					
462. - - Archer Daniels-Midland Co	A	Dividend	J	T					
463. - - Astrazeneca ADR	A	Dividend	J	T					
464. - - Autodesk Inc.		None	J	T					
465. - - Automatic Data Processing	A	Dividend	J	T					
466. - - Autozone, Inc.		None	J	T					
467. - - Avery Dennison Corp	A	Dividend	J	T					
468. - - Baker Hughes Company CL A	A	Dividend	J	T					
469. - - Ball Corp Com	A	Dividend	J	T					
470. - - Bank of America Corp	A	Dividend	K	T					
471. - - Baxter International	A	Dividend	J	T					
472. - - Becton Dicinson & Co	A	Dividend	J	T					
473. - - Berkshire Hathaway Inc.		None	K	T					
474. - - Best Buy Co Inc.	A	Dividend	J	T					
475. - - Biogen Inc.		None	J	T					
476. - - Blackrock Inc.	A	Dividend	J	T					

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477. - -H&R Block	A	Dividend	J	T					
478. - - Boeing Co		None	J	T					
479. - - Booking Holdings		None	J	T					
480. - - Boston Scientific		None	J	T					
481. - - Bristo-Myers Squibb	A	Dividend	J	T					
482. - - Broadcom Inc.	A	Dividend	J	T					
483. - - Brown-Forman Corp	A	Dividend	J	T					
484. - - CBRE Group		None	J	T					
485. - - CF Industries Holdings	A	Dividend	J	T					
486. - - CH Robinson Worldwide	A	Dividend	J	T					
487. - - Cigna Corp New	A	Dividend	J	T					
488. - - CME Group Inc.	A	Dividend	J	T					
489. - - CMS Energy Corp	A	Dividend	J	T					
490. - -CSX Corp Com	A	Dividend	J	T					
491. - - CNX Res Corp		None	J	T					
492. - - CVS Health Corporation	A	Dividend	J	T			J		
493. - - Coterra Energy Inc.	A	Dividend	J	T			J		

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

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
494. - - Caesars Entertainment Inc.		None	J	T			J		
495. - - Campbell Soup Co	A	Dividend	J	T			J		
496. - - Capital One Financial Corp	A	Dividend	J	T			J		
497. - - Cardinal Health Inc.	A	Dividend	J	T			J		
498. - -Carmax Inc.		None	J	T			J		
499. - - Carnival Corp		None	J	T			J		
500. - - Carrier Global Corp	A	Dividend	J	T			J		
501. - - Caterpillar Inc.	A	Dividend	J	T			J		
502. - - Centene Corp		None	J	T			J		
503. - - Centerpoint Energy Inc.	A	Dividend	J	T			J		
504. - - Charter Communications		None	J	T			J		
505. - - Chevron Corp New	A	Dividend	J	T			J		
506. - - Cincinnati Financial Corp	A	Dividend	J	T			J		
507. - - Cisco Systems Inc.	A	Dividend	J	T			J		
508. - - Cintas Corp	A	Dividend	J	T			J		
509. - - Citigroup Inc.	A	Dividend	J	T			J		
510. - - Citizens Financial Group	A	Dividend	J	T			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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
511. - - Citrix Systems Inc.	A	Dividend			Sold	10/03/22	J		
512. - - Clorox Co.	A	Dividend	J	T					
513. - - Coca-Cola Co	A	Dividend	J	T					
514. - - Colgate-Palmolive Co	A	Dividend	J	T					
515. - - Comcast Corp	A	Dividend	J	T					
516. - - Comerica Inc.	A	Dividend	J	T					
517. - - Conagra Brands Inc.	A	Dividend	J	T					
518. - - Conoco Phillips Com	A	Dividend	J	T					
519. - - Consolidated Edison	A	Dividend	J	T					
520. - - Constellation Brands, Inc.	A	Dividend	J	T					
521. - - Constellation Energy Corp	A	Dividend	J	T					
522. - - Corning, Inc.	A	Dividend	J	T					
523. - - Corteva Inc.	A	Dividend	J	T					
524. - - Costco Wholesale Corp	A	Dividend	J	T					
525. - - DR Horton Inc.	A	Dividend	J	T					
526. - - DTE Energy Co	A	Dividend	J	T					
527. - - DT Midstream Inc.	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
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H1 =$1,000,001 - $5,000,000
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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
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3. Value Method Codes (See Column C2)
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Name of Person Reporting	Date of Report
White, Helene N.	08/15/2024

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

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
528. - - DXC Technology Co	A	Dividend	J	T					
529. - - Danaher Corporation	A	Dividend	J	T					
530. - - Darden Restaurants, Inc.	A	Dividend	J	T					
531. - - Deere & Co	A	Dividend	J	T					
532. - - Delta Air Lines	A	Dividend	J	T					
533. - - Dentsply Sirona Inc.	A	Dividend	J	T					
534. - - Devon Energy Corp	A	Dividend	J	T					
535. - - Dexcom, Inc.	A	Dividend	J	T					
536. - - Diamondback Energy Inc.	A	Dividend	J	T					
537. - - Disney Walt Co Com		None	J	T					
538. - - Dish Network Corp CL A		None	J	T					
539. - - Discover Financial Services	A	Dividend	J	T					
540. - - Dollar Gen Corp New	A	Dividend	J	T					
541. - - Dollar Tree Inc.		None	J	T					
542. - - Dominion Energy Inc. Com	A	Dividend	J	T					
543. - -Dover Corp Com	A	Dividend	J	T					
544. - - Dow Inc. Com	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
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Name of Person Reporting	Date of Report
White, Helene N.	08/15/2024

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

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
545. - - Duke Energy Corp New	A	Dividend	J	T					
546. - - DuPont De Nemours Inc.	A	Dividend	J	T					
547. - - EOG Resources Inc.	A	Dividend	J	T					
548. - - Eastman Chemical Co.	A	Dividend	J	T					
549. - - EBAY Inc.	A	Dividend	J	T					
550. - - Ecolab Inc.	A	Dividend	J	T					
551. - - Edison International	A	Dividend	J	T					
552. - - Edwards Lifesciences Corp		None	J	T					
553. - - Elanco Animal Health Inc.		None	J	T					
554. - - Electronic Arts Inc.	A	Dividend	J	T					
555. - - Embecta Corp		None	J	T					
556. - - Emerson Electric Co.	A	Dividend	J	T					
557. - - Enbridge Inc.		None	J	T					
558. - - Equifax Inc.	A	Dividend	J	T					
559. - - Evergy Inc.	A	Dividend	J	T					
560. - - Eversource Energy	A	Dividend	J	T					
561. - - Exelon Corp	A	Dividend	J	T					

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Name of Person Reporting	Date of Report
White, Helene N.	08/15/2024

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

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562. - - Expedia Group Inc.		None	J	T					
563. - - Exxon Mobil Corp	A	Dividend	J	T					
564. - - FMC Corp	A	Dividend	J	T					
565. - - Meta Platforms Inc. Class A		None	K	T					
566. - - Fastenal Com Stk	A	Dividend	J	T					
567. - - FEDEX Corp Com	A	Dividend	J	T					
568. - - F5 Inc.		None	J	T					
569. - - Fidelity National Information Services	A	Dividend	J	T					
570. - - Fifth Third Bancorp	A	Dividend	J	T					
571. - - Fiserv Inc.		None	J	T					
572. - -Ford motor Co Del	A	Dividend	J	T					
573. - - Fortive Corp	A	Dividend	J	T					
574. - - Fortune Brands Home & Security, Inc.	A	Dividend	J	T					
575. - - Fox Corp CL B	A	Dividend	J	T					
576. - - Franklin Resources, Inc.	A	Dividend	J	T					
577. - - Freeport-McMoran Inc.	A	Dividend	J	T					
578. - - GAP Inc.	A	Dividend	J	T					

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

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

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
579. - - Gartner Inc.	A	Dividend	J	T					
580. - - General Electric Co	A	Dividend	J	T					
581. - - General Mills Inc.	A	Dividend	J	T					
582. - - General Motors Co.		None	J	T					
583. - - Gilead Sciences Inc.	A	Dividend	J	T					
584. - - Global Payments Inc.	A	Dividend	J	T					
585. - - Globe Life Inc.	A	Dividend	J	T					
586. - - Goldman Sachs Group, Inc.	A	Dividend	J	T					
587. - - Grainger WW Inc.	A	Dividend	J	T					
588. - - HF Sinclair Corp		None	J	T					
589. - - HCA Healthcare Inc.	A	Dividend	J	T					
590. - - HP Inc.	A	Dividend	J	T					
591. - - Halliburton Co.	A	Dividend	J	T					
592. - - Hasbro, Inc.	A	Dividend	J	T					
593. - - Hershey Company	A	Dividend	J	T					
594. - - Hess Corporation	A	Dividend	J	T					
595. - - Hewlett Packard Enterprise	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)
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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
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596. - - Home Depot Inc.	A	Dividend	K	T					
597. - - Honeywell International	A	Dividend	J	T					
598. - - Hormel Foods	A	Dividend	J	T					
599. - - Howmet Aerospace Inc.	A	Dividend	J	T					
600. - - Humana, Inc.	A	Dividend	J	T					
601. - - Huntington Bancshares, Inc.	A	Dividend	J	T					
602. - - Huntington Ingalls Industries, Inc.	A	Dividend	J	T					
603. - - Illinois Tool Works Inc.	A	Dividend	J	T					
604. - - Illumina Inc.		None	J	T					
605. - - Incyte Corp		None	J	T					
606. - - Ingersoll Rand Inc.	A	Dividend	J	T					
607. - - Intel Corp Com	A	Dividend	J	T					
608. - - Intercontinental Exchange Inc.	A	Dividend	J	T					
609. - - International Flavors & Fragrances	A	Dividend	J	T					
610. - - International Paper	A	Dividend	J	T					
611. - - Interpublic Group Cos, Inc.	A	Dividend	J	T					
612. - - Intuitive Surgical Inc.		None	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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613. - - Intuit, Inc.	A	Dividend	J	T					
614. - - IQVIA Holdings, Inc.		None	J	T					
615. - - JPMorgan Chase & Co	A	Dividend	K	T					
616. - - Jacobs ENGR Group	A	Dividend	J	T					
617. - - Johnson & Johnson Com.	A	Dividend	K	T					
618. - - KLA Corp	A	Dividend	J	T					
619. - - Keycorp Com.	A	Dividend	J	T					
620. - - Keysight Technologies		None	J	T					
621. - - Kimberly-Clark Corp.	A	Dividend	J	T					
622. - - Kinder Morgan Inc.	A	Dividend	J	T					
623. - - Kohls Corp.	A	Dividend	J	T					
624. - - Kraft Heinz Co.	A	Dividend	J	T					
625. - -Kroger Co.	A	Dividend	J	T					
626. - - L3 Harris Technologies	A	Dividend	J	T					
627. - - Laboratory Corp Amer Holdings		None	J	T					
628. - - LAM Research Corp	A	Dividend	J	T					
629. - - Lamb Weston Holdings	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
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
630. - - Las Vegas Sands Corp.		None	J	T					
631. - - Estee Lauder Companies Inc.	A	Dividend	J	T					
632. - - Lennar Corp	A	Dividend	J	T					
633. - - Eli Lilly and Co.	A	Dividend	J	T					
634. - - Lincoln National Corp.	A	Dividend	J	T					
635. - -Livent Corp.		None	J	T					
636. - - Lockheed Martin Corp.	A	Dividend	J	T					
637. - - Loews Corp	A	Dividend	J	T					
638. - -Lowes Companies Inc.	A	Dividend	J	T					
639. - - Loyalty Ventures Inc.		None	J	T					
640. - - Lumen Technologies Inc.	A	Dividend	J	T					
641. - - M&T Bank Corp.	A	Dividend	J	T					
642. - - MGM Resorts International	A	Dividend	J	T					
643. - - Marathon Oil Corp	A	Dividend	J	T					
644. - - Marathon Petroleum Corp.	A	Dividend	J	T					
645. - -Marsh & McLennan Companies	A	Dividend	J	T					
646. - -Marriott International, Inc.		None	J	T					

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

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647. - - Martin Marietta Materials Inc.	A	Dividend	J	T					
648. - - Masco Corp	A	Dividend	J	T					
649. - - Mastercard Inc. CL A	A	Dividend	K	T					
650. - - Masterbrand, Inc.		None	J	T	Buy	12/01/22	J		
651. - - McCormick & Company Inc.	A	Dividend	J	T					
652. - - McDonalds Corp.	A	Dividend	J	T					
653. - - Merck & Co.	A	Dividend	J	T					
654. - - MetLife Inc.	A	Dividend	J	T					
655. - - Mettler-Toledo International		None	J	T					
656. - - Microsoft Corp.	A	Dividend	L	T					
657. - - Microchip Technology Inc.	A	Dividend	J	T					
658. - - Micron Technology Inc.	A	Dividend	J	T					
659. - -Moderna INc.		None	J	T					
660. - - Molson Coors Beverage Co CL B	A	Dividend	J	T					
661. - - Mondelez International	A	Dividend	J	T					
662. - - Monster Beverage Corp		None	J	T					
663. - - Moody's Corp.	A	Dividend	J	T					

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664. - - Morgan Stanley Com	A	Dividend	J	T					
665. - - Mosaic Co. New	A	Dividend	J	T					
666. - - Motorola Solutions, Inc.	A	Dividend	J	T					
667. - - NRG Energy Inc.	A	Dividend	J	T					
668. - - Nasdaq Inc.	A	Dividend	J	T					
669. - - Netflix, Inc.	A	Dividend	J	T					
670. - - Newell Brands, Inc.	A	Dividend	J	T					
671. - - Newmont Corp.	A	Dividend	J	T					
672. - - News Corp New	A	Dividend	J	T					
673. - - Nextera Energy Inc.	A	Dividend	J	T					
674. - - Nike Inc. CL B	A	Dividend	J	T					
675. - - Nisource Inc.	A	Dividend	J	T					
676. - - Norfolk Southern Corp	A	Dividend	J	T					
677. - - Northern Trust Corp	A	Dividend	J	T					
678. - - Northrop Grumman Corp.	A	Dividend	J	T					
679. - - Nucor Corp	A	Dividend	J	T					
680. - - Nvidia Corporation	A	Dividend	K	T					

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681. - - O'Reilly Automotive Inc.		None	J	T					
682. - - Occidental Pete Corp	A	Dividend	J	T					
683. - - Oneok Inc.	A	Dividend	J	T					
684. - - Oracle Corp.	A	Dividend	J	T					
685. - - Organon & Co	A	Dividend	J	T					
686. - - PNC Financial Service Group	A	Dividend	J	T					
687. - - PPG Industries Inc.	A	Dividend	J	T					
688. - - PPL Corp.	A	Dividend	J	T					
689. - - PVH Corporation	A	Dividend	J	T					
690. - - Paccar Inc.	A	Dividend	J	T					
691. - - Paychex, Inc.	A	Dividend	J	T					
692. - - Paypal Holdings, Inc.		None	J	T					
693. - - Penn National Gaming Inc. (nka Penn Entertainment, Inc.		None	J	T					
694. - - Pepsico Inc.	A	Dividend	J	T					
695. - - Pfizer Inc.	A	Dividend	J	T					
696. - - Philip Morris International Inc.	A	Dividend	J	T					
697. - - Phillips 66 Com	A	Dividend	J	T					

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698. - - Pinnacle West Capital Corp	A	Dividend	J	T					
699. - - Pioneer Natural Resources Co.	A	Dividend	J	T					
700. - - Price T Rowe Groups	A	Dividend	J	T					
701. - - Principal Financial Group Inc.	A	Dividend	J	T					
702. - - Proctor and Gamble Co.	A	Dividend	J	T					
703. - - Progressive Corp	A	Dividend	J	T					
704. - - Prudential Financial Inc.	A	Dividend	J	T					
705. - - Pubic Service Enterprise Group	A	Dividend	J	T					
706. - - Qorvo Inc.	A	Dividend	J	T					
707. - - Qualcomm Inc.		None	J	T					
708. - - Quest Diagnostics Inc.	A	Dividend	J	T					
709. - - Raytheon Technologies Corp.	A	Dividend	J	T					
710. - - Regeneron Pharmaceuticals, Inc.		None	J	T					
711. - - Regions Financial Corp.	A	Dividend	J	T					
712. - - Republic Services Inc.	A	Dividend	J	T					
713. - - Robert Half International	A	Dividend	J	T					
714. - - RockwellAutomation, Inc.	A	Dividend	J	T					

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715. - - Roper Technologies Inc.	A	Dividend	J	T					
716. - - Ross Stores Inc.	A	Dividend	J	T					
717. - - S&P Global Inc.	A	Dividend	J	T					
718. - - Salesforce Inc.	A	Dividend	J	T					
719. - - Schlumberger Limited Com	A	Dividend	J	T					
720. - - Schwab Charles Corp	A	Dividend	J	T					
721. - - Sealed Air Corp.	A	Dividend	J	T					
722. - - Sempra Com	A	Dividend	J	T					
723. - - Service Now Inc.		None	J	T					
724. - - Skyworks Solutions Inc.	A	Dividend	J	T					
725. - - Smucker JM Co.	A	Dividend	J	T					
726. - - Southern Co.	A	Dividend	J	T					
727. - - Southwest Airlines Co.	A	Dividend	J	T					
728. - - Stanley Black & Decker	A	Dividend	J	T					
729. - - Starbucks Corp	A	Dividend	J	T					
730. - - Stryker Corporation	A	Dividend	J	T					
731. - - Sylvamo Corp		None	J	T					

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732. - - Synchrony Financial	A	Dividend	J	T					
733. - - Sysco Corp.	A	Dividend	J	T					
734. - - TJX Companies	A	Dividend	J	T					
735. - - T-Mobile US Inc		None	J	T					
736. - - Target Corp.	A	Dividend	J	T					
737. - - Tesla Inc.		None	K	T					
738. - - Texas Instruments Inc.	A	Dividend	J	T					
739. - - Thermo Fisher Scientific	A	Dividend	J	T					
740. - - Tractor Supply Co.	A	Dividend	J	T					
741. - - Travelers Companies, Inc.	A	Dividend	J	T					
742. - - Truist Financial Corp.	A	Dividend	J	T					
743. - - Twitter Inc.		None			Sold	10/31/22	J		
744. - - Tyson Foods Inc.	A	Dividend	J	T					
745. - - Ulta Beauty Inc.		None	J	T					
746. - - Under Armour Inc., COM		None	J	T					
747. - - Under Armour Inc. CL C		None	J	T					
748. - - Union PAC Corp	A	Dividend	J	T					

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749. - - United Airlines Holdings Inc.		None	J	T					
750. - - United Parcel Service, Inc.	A	Dividend	K	T					
751. - - United HealthGroup, Inc.	A	Dividend	J	T					
752. - - Universal Health Services, Inc.	A	Dividend	J	T					
753. - - UNUM Group	A	Dividend	J	T					
754. - - VF Corp Com	A	Dividend	J	T					
755. - - Valero Energy Corp.	A	Dividend	J	T					
756. - - Verizon Communications, Inc.	A	Dividend	J	T					
757. - - Vertex Pharmaceuticals, Inc.		None	J	T					
758. - - Paramount Global CL B	A	Dividend	J	T					
759. - - Viatris, Inc.	A	Dividend	J	T					
760. - - Visa Inc.	A	Dividend	J	T					
761. - - Vontier Corp.	A	Dividend	J	T					
762. - - Vulcan Materials Co.	A	Dividend	J	T					
763. - - Wabtec Com	A	Dividend	J	T					
764. - - Walmart Inc.	A	Dividend	J	T					
765. - - Warner Bros Discovery Inc.		None	J	T					

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
766. - - Waste Management Inc.	A	Dividend	J	T					
767. - - Waters Corp		None	J	T					
768. - - Wells Fargo Co New	A	Dividend	J	T					
769. - - Westrock Co.	A	Dividend	J	T					
770. - - Whirlpool Corp.	A	Dividend	J	T					
771. - - Williams Cos Inc.	A	Dividend	J	T					
772. - - Wynn Resorts Ltd		None	J	T					
773. - - XCEL Energy Inc.	A	Dividend	J	T					
774. - - YUM Brands Inc.	A	Dividend	J	T					
775. - - Zimmer Biomet Holdings Inc.	A	Dividend	J	T					
776. - - Zions Bancorporation N A Com	A	Dividend	J	T					
777. - - Zoetis Inc.	A	Dividend	J	T					
778. - - American Tower Corp.	A	Dividend	J	T					
779. - - Apartment Income REIT Corp	A	Dividend	J	T					
780. - - Crown Castle Intl Corp	A	Dividend	J	T					
781. - - Digital Realty Trust Inc.	A	Dividend	J	T					
782. - - Extra Space Storage Inc.	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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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
783. - - Federal Realty Invt Trust New	A	Dividend	J	T					
784. - - Healthpeak Properties Inc.	A	Dividend	J	T					
785. - - Host Hotels & Resorts Inc.	A	Dividend	J	T					
786. - - Iron Mountain Inc.	A	Dividend	J	T					
787. - - Kimco Realty Corp	A	Dividend	J	T					
788. - - Mid-America Apt. Communities Inc.	A	Dividend	J	T					
789. - - Prologis Inc.	A	Dividend	J	T					
790. - - Public Storage Com	A	Dividend	J	T					
791. - - Realty Income Corp.	A	Dividend	J	T					
792. - - Regency Centers Corp	A	Dividend	J	T					
793. - - SL Green Realty Corp.	A	Dividend	J	T					
794. - - Simon Property Group Inc.	A	Dividend	J	T					
795. - - Ventas Inc.	A	Dividend	J	T					
796. - - Vornado Realty Trust	A	Dividend	J	T					
797. - - Welltower Inc.		None	J	T					
798. - 2010 TR - Fidelity Acct #3 (see line 799) (H)									
799. - - Fidelity Government Cash Reserves	C	Dividend	P1	T	Open	09/29/22	P1		

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C =$2,501 - $5,000
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H1 =$1,000,001 - $5,000,000
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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
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800. - 2010 TR - Morgan Stanley Acct#1 (lines 801-825) (H)									
801. - - Morgan Stanley Money Market Account	A	Interest	M	T					
802. - - Ishares Core U.S. Aggregate	C	Int./Div.			Sold	11/22/22	M		
803. - - Ishares JP Morgan EM Bond ETF (EMB)	B	Int./Div.			Sold	05/17/22	L		
804. - - IShares S&P Mid-Cap 400 G ETF	B	Int./Div.	M	T					
805. - - IShares S&P Small Cap 600 V ETF	B	Int./Div.	M	T					
806. - - Janus Henderson Sht Dur	C	Int./Div.	N	T					
807. - - JPM Diversified	C	Int./Div.	M	T					
808. - - JPMorgan Equity Premium INCO	C	Int./Div.	L	T	Buy	05/13/22	L		
809. - - JPMorgan Ultra-Short Inc ETF	C	Int./Div.	N	T					
810. - - Proshares TR S&P 500 DV ARIST (NOBL)	D	Int./Div.	N	T					
811. - - Proshares RSL 2000 DVD ETF	B	Int./Div.	M	T					
812. - - Vanguard FTSE Emerging Markets	C	Int./Div.	M	T					
813. - - Vanguard Growth ETF	C	Int./Div.	N	T					
814. - - Vanguard High DIV Yield ETF	D	Int./Div.	M	T					
815. - - Vanguard Index Fds S&P 500 ETF (V00)	D	Int./Div.	N	T					
816. - - Vanguard Mid Cap Value ETF (VOE)	C	Int./Div.	M	T					

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817. - - Vanguard REIT ETF	C	Int./Div.	L	T					
818. - - Victoryshares US Larg Cap H	D	Int./Div.	M	T					
819. - - American Balanced F2	A	Int./Div.	M	T					
820. - - Blackstone Alt Mult-Strat Inst (BXMIX)	C	Int./Div.	M	T					
821. - - Franklin K-2 Alternative Strtgs ADV	A	Int./Div.			Sold	02/11/22	M		
822. - - Harding Loevner INtl Eqty Inst (HLMIX)	D	Int./Div.	N	T					
823. - - Janus Flexible Bond I (JFLEX)	D	Int./Div.	M	T					
824. - - JPMorgan Hedged Equity 21	A	Int./Div.			Sold	11/02/22	M		
825. - - PGIM Core Bond Z	B	Int./Div.	M	T	Buy	10/31/22	M		
826. - 2010 Trust -Morgan Stanley Acct#2 (lines 827-856) (H)									
827. - - Bartow Cnty GA Sch Dis	A	Interest			Sold	11/07/22	K		
828. - - Canyon TX Ind Sch Dist	A	Interest			Sold	03/25/22	L		
829. - - Colordo State Bldg.	A	Interest			Sold	11/07/22	L		
830. - - El Paso Tex Wtr & Swr	A	Interest			Sold	11/07/22	K		
831. - - Energy Northwest Wash Elec Rev	B	Interest			Sold	11/07/22	L		
832. - - Florida ST Dept Trans Fed	A	Interest			Sold	11/07/22	K		
833. - - Hawaii ST Gen Obl	A	Interest			Sold	11/07/22	L		

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834. - - Honolulu Hawaii City & Cnty BR	A	Interest			Sold	01/17/22	L		
835. - - Honolulu Hawaii City & Cnty WA	A	Interest			Sold	03/11/22	K		
836. - - Kansas City Mo Water Rev REF-A	B	Interest			Sold	11/07/22	K		
837. - - Las Vegas NV Wtr Dist	A	Interest			Buy	03/11/22	K		
838. - - Las Vegas NV Wtr Dist					Sold	11/07/22	K		
839. - - Madison Wis Genl Oblg Ref C	A	Interest			Buy	09/07/22	K		
840. - - Madison Wis Genl Oblg Ref C					Sold	11/07/22	K		
841. - - Maricopy Cnty Ariz School Dist	B	Interest			Sold	11/07/22	K		
842. - - Maricopa County Arizona School Dist Wash Emem Ser C	A	Interest			Sold	11/07/22	K		
843. - - Midland TEX Rev	A	Interest			Sold	11/07/22	L		
844. - - Minneapolis MN SPL SCH DIST	A	Interest			Sold	03/18/22	K		
845. - - New York ST Dorm Auth Sales Tax	A	Interest			Sold	11/07/22	K		
846. - - New York ST Urban Dev Corpo Per S Income Tax	B	Interest			Sold	11/07/22	K		
847. - - Nevada State Hwy Impt Rev B	A	Interest			Sold	11/07/22	K		
848. - - North Carolina ST Univ NC	A	Interest			Sold	11/07/22	K		
849. - - Ohio State Mental Health CAP FACS	A	Interest			Sold	03/25/22	K		
850. - - Okaloosa Cnty FL Sch Dist	A	Interest	K	T	Buy	03/17/22	K		

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851. - - Pierce Cnty Wash Sch Dist No oo	A	Interest	K	T	Buy	03/16/22	K		
852. - - Port Beaumont Tex Nav Dist	A	Interest			Sold	11/07/22	K		
853. - - Sarasota Co FL Infrastructure	A	Interest			Sold	03/16/22	L		
854. - - Washington ST Genl Oblig SER-D	A	Interest			Sold	11/07/22	L		
855. - -West VA Commr of Hwys Spl Ob	A	Interest	K	T	Buy	09/02/22	K		
856. - - Wisconsin ST Gen Oblig	A	Interest			Sold	08/30/22	L		
857. [redacted] fbo[redacted] (H) (lines 858-929)									
858. - - Wells Fargo checking account (fna Wachovia)		None	K	T					
859. - - 1% Membership interest in Unit 610, LLC ([redacted], CO)		None			Distributed	05/02/22	J		[redacted]
860. - UBS Acct #1 (H)									
861. - - UBS Bank USA Dep Acct	A	Int./Div.	J	T					
862. - - Alphabet Inc. CL A	A	Int./Div.	J	T					
863. - - Alphabet Inc. CL C	A	Int./Div.	J	T					
864. - - Amazon.Com Inc	A	Int./Div.	K	T					
865. - - Apple Inc.	A	Int./Div.	J	T					
866. - - Berkshire Hathaway, Inc.	A	Int./Div.	K	T					
867. - - CVS Health Corp	A	Int./Div.	K	T					

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868. - - Duckhorn Portfolio Inc.	A	Int./Div.			Sold	06/14/22	J		
869. - - Ferrari NV New EUR	A	Int./Div.	J	T					
870. - - Generac Holdings Inc.	A	Int./Div.	J	T					
871. - - Lululemon Athletica Inc.	A	Int./Div.	J	T					
872. - - LVMH Moet Hennessy Louis	A	Int./Div.	J	T					
873. - - Meta Platforms Inc. CL A	A	Int./Div.	J	T	Buy	03/17/22	J		
874. - - Microsoft Corp	A	Int./Div.	K	T					
875. - - Nike Inc., CL B	A	Int./Div.	J	T					
876. - - Smile Direct Club Inc.	A	Int./Div.			Sold	01/04/22	J		
877. - - Starbucks Corp	A	Int./Div.	J	T					
878. - - Tesla, Inc.		None	J	T	Buy	06/10/22	J		
879. - - Twilio Inc. CL A	A	Int./Div.	J	T	Buy	03/17/22	J		
880. - - Visa Inc.	A	Int./Div.	J	T					
881. - - Virtus Zevenbergen Innovative Growth Stock	A	Int./Div.	K	T					
882. - - Fidelity MSCI Consumer Disc Index ETF	B	Int./Div.	K	T					
883. - - American Beacon ARK Trans INNOV Fund	B	Int./Div.			Sold	01/03/22	K		
884. - UBS Acct #2 (H)									

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885. - - UBS Bank USA Dep Acct	A	Int./Div.	J	T					
886. - - Abbott Labs	A	Int./Div.	J	T	Buy	09/06/22	J		
887. - - Abbvie Inc.	A	Int./Div.	J	T	Buy	05/02/22	J		
888. - - Accenture PLC Ireland	A	Int./Div.	J	T					
889. - - American Electric Power	A	Int./Div.	J	T					
890. - - Amgen Inc.	A	Int./Div.	J	T					
891. - - Analog Devices Inc.	A	Int./Div.	J	T					
892. - - Automatic Data Processing	A	Int./Div.	J	T					
893. - - Blackrock Inc.	A	Int./Div.	J	T					
894. - - Broadcom Inc.	A	Int./Div.	J	T					
895. - - Chubb Ltd	A	Int./Div.	J	T					
896. - - Cisco Systems Inc.	A	Int./Div.	J	T					
897. - - Coca Cola Co.	A	Int./Div.	J	T					
898. - - Comcast Corp New CL A	A	Int./Div.			Sold	05/04/22	J		
899. - - Diageo PLC	A	Int./Div.	J	T					
900. - - Discover Financial Services	A	Int./Div.	J	T					
901. - - EOG Resources, Inc.	A	Int./Div.	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
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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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Name of Person Reporting	Date of Report
White, Helene N.	08/15/2024

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
902. - - Exxon Mobil Corp	A	Int./Div.	J	T	Buy	12/09/22	J		
903. - - Home Depot Inc.	A	Int./Div.	J	T					
904. - - Honeywell Intl Inc.	A	Int./Div.	J	T	Buy	05/02/22	J		
905. - - Johnson & Johnson	A	Int./Div.	J	T					
906. - - JPMorgan Chase & Co	A	Int./Div.	J	T					
907. - - Linde PLC Eur	A	Int./Div.	J	T					
908. - - Lockheed Martin Corp	A	Int./Div.			Sold	01/07/22	J		
909. - - Marsh & McLennan Cos	A	Int./Div.	J	T					
910. - - McDonalds Corp	A	Int./Div.	J	T					
911. - - Medtronic PLC	A	Int./Div.			Sold	06/07/22	J		
912. - - Microsoft Corp	A	Int./Div.	J	T					
913. - - Morgan Stanley	A	Int./Div.	J	T					
914. - - Nextera Energy Inc.	A	Int./Div.	J	T					
915. - - Novartis AG	A	Int./Div.			Sold	02/14/22	J		
916. - - Oracle Corp	A	Int./Div.	J	T	Buy	07/21/22	J		
917. - - Phillips 66	A	Int./Div.	J	T					
918. - - Proctor & Gamble	A	Int./Div.	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
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
919. - - Prologis Inc.	A	Int./Div.	J	T	Buy	09/06/22	J		
920. - - Raytheon Technologies	A	Int./Div.	J	T					
921. - - Republic Services Inc.	A	Int./Div.	J	T					
922. - - Rockwell Automation Inc.	A	Int./Div.			Sold	05/04/22	J		
923. - - Starbucks Corp	A	Int./Div.	J	T					
924. - - Texas Instruments	A	Int./Div.	J	T					
925. - - Trust Financial Corp	A	Int./Div.	J	T					
926. - - Union Pacific Corp	A	Int./Div.	J	T					
927. - - Unitedhealth Group Inc.	A	Int./Div.	J	T					
928. - - United Parcel Service Inc CL B	A	Int./Div.	J	T					
929. - - VF Corp	A	Int./Div.			Sold	02/14/22	J		
930. [redacted] fbo[redacted] (H) (see lines 931-932)									
931. - - Wells Fargo checking account (fna Wachovia)		None	J	T					
932. - - 1% Membership interest in Unit 610, LLC ([redacted] CO)		None			Distributed	05/02/22	J		[redacted]
933. Promissory Note from [redacted] - Loans to Trust	D	Interest	P1	T					Debtor: [redacted]
934. Promissory Note from [redacted] - Loans to Trust	D	Interest	P1	T					Debtor: [redacted]
935. Promissory Note from [redacted] - Loans to Trust	A	Interest	M	T					Debtor: [redacted]

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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936. Promissory Note from [redacted] - Loans to Trust	A	Interest	M	T					Debtor: [redacted]
937. [redacted] (H) (lines 938-945)									
938. - - Raymond James Bank Dep Program	A	Interest	J	T					
939. - - Blackrock Strategic Inc. Opportunites Port Instl	A	Int./Div.	K	T					
940. - - Brown Advisory Beutel Goodman Larg Cap Val	A	Int./Div.	L	T					
941. - - Dodge & Cox Income Fund	A	Int./Div.			Sold	10/31/22	K	C	
942. - - MFS International Growth FUnd Class I N/L	A	Int./Div.			Sold	07/13/22	K		
943. - - Parnassus Core Euqity Fund Investor Class N/L	A	Int./Div.	M	T					
944. - - Performance Trust Strategic Bond Fund	B	Int./Div.	K	T					
945. - - Royce Value Trust Inc	B	Int./Div.	J	T	Buy	10/28/22	J		
946. Brokerage Acct #10 (Baird) (H) (lines 947-1062)									
947. - - Baird FDIC insured Deposit Multi-Bank Money Market Fund	C	Dividend	M	T					
948. - - Abbott Laboratories	B	Dividend	M	T					
949. - - Amgen, Inc.	D	Dividend	M	T					
950. - - AON PLC CL A	A	Dividend	K	T	Buy	09/06/22	K		
951. - - Apple, Inc.	B	Dividend	N	T					
952. - - Automatic Data Processing	D	Dividend	N	T					

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953. - - Avalon Bay Commntys Inc.	A	Dividend	K	T	Buy	08/30/22	K		
954. - - Berkshire Hathaway Inc. Del CL A Fmly Common		None			Sold	08/18/22	N	G	
955. - - Boswell JG CO Com	C	Dividend	M	T					
956. - - Broadridge Financial Solutions	C	Dividend	N	T					
957. - - Carrier Global Corp	A	Dividend	K	T	Buy	08/30/22	K		
958. - - Walt Disney Co.	A	Dividend	K	T	Buy	09/02/22	K		
959. - - Johnson & Johnson	D	Dividend	M	T					
960. - - Kimberly Clark Corp	A	Dividend	K	T					
961. - - Medtronic PLC	B	Dividend			Sold	12/15/22	L		
962. - - Merck & Co, Inc. New Com N/C	D	Dividend	N	T					
963. - - Microsoft Corp.	B	Dividend	M	T					
964. - - Nestle SA Spon	D	Dividend	N	T					
965. - - NSTAR Elec Co PFD	D	Dividend	M	T					
966. - - PAC CAR Inc Com	D	Dividend	N	T					
967. - - Paychex, Inc.	A	Dividend			Sold	03/29/22	M		
968. - - Raytheon Co. New	D	Dividend	N	T					
969. - - Sysco Corp	A	Dividend	K	T					

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E =$15,001 - $50,000
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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
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970. - - Visa Inc. CL A	A	Dividend	K	T					
971. - - Whirlpool Corp	A	Dividend			Sold	09/27/22	J		
972. - - WTB Finl Corp CMT CL B COM Non Vtg	D	Dividend	N	T					
973. - - Baird Chautauqua Intl Growth Instl CL	B	Dividend	M	T					
974. - - King Cnty, Wash Ltd Tax GO	C	Interest			Sold	10/27/22	N		
975. - - Overland Park KS Internal	B	Interest			Sold	09/01/22	M		
976. - -Houston, TX Indpt Sch Dist RFDG Ser A	B	Interest			Sold	02/15/22	M		
977. - - King Cnty WA Sch Dist 411 Issaquah Rfdg B/E	B	Interest			Sold	12/07/22	L		
978. - - Maryland State St & Local FAC	C	Interest			Sold	08/01/22	N		
979. - - Bloomfield Hills MI Schs Dist	C	Interest	M	T					
980. - - Livingston Co MI RFDG	D	Interest			Sold	12/15/22	N		
981. - - Alpine, UT Sch Dist Bld Ser B	D	Interest	M	T					
982. - -Ann Arbor, MI Sch Dist	C	Interest			Sold	12/14/22	M		
983. - - Raleigh NC Rfdg Ser A	B	Interest	L	T					
984. - - Tacoma, WA RfDG Ltd Tax	B	Interest	K	T					
985. - - Birmingham, MI RFDG B/E PTC	C	Interest	L	T					
986. - - King Co. WA School Dist 415 Ken B/E	A	Interest	K	T					

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987. - - Parker Co. TX B/E PTC	B	Interest	K	T					
988. - - Seattle WA Drain & Wstwtr Rev RFDG	A	Interest	K	T					
989. - - Lansing, MI RFDG B/E	D	Interest	M	T					
990. - - Wyoming, MI WTR SPLY SYS	D	Interest	M	T					
991. - - Plymouth Canton MI Cmnty Sch Dist	B	Interest	L	T					
992. - - Lansing, MI Brd Wtr & LT Util Sys	D	Interest	M	T					
993. - - Saginaw Cnty MI B/E #7867025D8	C	Interest	L	T	Buy	12/28/22	L		
994. - - Adams Cnty WA JT CONS SCH Dist	B	Interest	L	T					
995. - - Kent Cnty MI RFDG	B	Interest	K	T	Buy	09/08/22	K		
996. - - Farmington Hills, MI CAP IMPT B/E	C	Interest			Sold	12/14/22	M		
997. - - Oakland CNTY MI Evergreen Farmington SWR DISP SYS	B	Interest	L	T					
998. - - Kalamazoo Cnty MI Juvenile Home FACS	D	Interest	M	T					
999. - - Sterling Hts MI CAP IMPT	A	Interest	K	T					
1000. - - West Ottawa, MI Pub SCH DIST BLDG SITE	D	Interest			Sold	12/15/22	M		
1001. - - Shoreline Fire Dept WA King CNTY B/E	B	Interest	L	T					
1002. - - East Lansing, MI Sch Dist RFDG	A	Interest	K	T					
1003. - - Southfield MI Water & Sewer CAP Impt	C	Interest	M	T					

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D =$5,001 - $15,000
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F =$50,001 - $100,000
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J =$15,000 or less
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L =$50,001 - $100,000
M =$100,001 - $250,000
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1004. - - Tacoma, WA RFDG B/E	B	Interest	K	T					
1005. - - Davenport IA Corp	B	Interest	L	T					
1006. - - Durham County North Carolina Municipal Bond	C	Interest	M	T					
1007. - - Federal Way WA Ser A B/E	C	Interest			Sold	12/15/22	M		
1008. - - Lakeview MI PUB SCH DIST	C	Interest	M	T					
1009. - - Grand Blanc MI CMNTY SCHS BLDG	C	Interest	L	T					
1010. - - King County WA Rural Libr	C	Interest	M	T	Buy	09/08/22	M		
1011. - - Harrison, MI CMNTY SCHLS SCH BLDG	C	Interest	L	T					
1012. - - Schoolcraft, MI CLLG FAC	B	Interest			Sold	10/03/22	M		
1013. - - Farwell, MI Area SCHS BLDG	B	Interest	L	T					
1014. - - Airport MI CMNTY SCH DIST	B	Interest			Sold	12/14/22	M		
1015. - - Battle Creek, MI SCH DIST RFDG	B	Interest	L	T					
1016. - - Clarkston, MI CMNTY SCHS RFDG SER A	B	Interest	L	T					
1017. - - Brandon MI Sch Dista Rfdg Ser A	B	Interest	K	T	Buy	12/28/22	K		
1018. - - Hamilton MI CMNTY SCH DIS	A	Interest	K	T	Buy	05/09/22	K		
1019. - - Mattawan MI CONS Sch Dist	B	Interest	K	T	Buy	12/28/22	K		
1020. - - Midland, MI Pub Schs	B	Interest	K	T	Buy	12/28/22	K		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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
White, Helene N.	08/15/2024

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

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1021. - -Midland, MI Pub Schl Blvd	B	Interest	K	T	Buy	12/28/22	K		
1022. - -Roseville, MI CMNTY Schl	B	Interest	K	T	Buy	12/28/22	K		
1023. - - Utica MI CMNTy SCH BLDG	B	Interest	L	T	Buy	08/11/22	L		
1024. - - Ottawa Cnty MI RFDG WTR SPLY	B	Interest	K	T	Buy	09/08/22	K		
1025. - -Byron Center MI PUB SCHL	B	Interest	K	T	Buy	12/28/22	K		
1026. - - Michigan ST RFDG ENV	B	Interest	K	T	Buy	12/28/22	K		
1027. - - Mona Shores, MI PUB SCHS BLDG & SITE	B	Interest	L	T					
1028. - - Southfield, MI WTR & SWR CAP IMPT	B	Interest			Sold	08/15/22	N		
1029. - - Battle Creek MI SCH DIST RFDG	B	Interest	L	T					
1030. - - Fraser, MI PUB SCH DIST RFDG	B	Interest	K	T					
1031. - - East China, MI SCH DIST BLDG SITE	B	Interest			Sold	07/06/22	M		
1032. - - Grand Rapids, MI PUB SCHS RFDG	C	Interest	M	T					
1033. - - Schoolcraft CLLG MI	C	Interest			Sold	10/18/22	M		
1034. - - Southfield, MI WTR & SWR CAP IMPT	B	Interest			Sold	08/15/22	M		
1035. - - Goodrich, MI Area SCH DIST	B	Interest			Sold	07/22/22	M		
1036. - - Dearborn MI SCH DIST BLDG & SITE SER A	C	Interest	L	T					
1037. - - Dearborn MI SCH DIST BLDG & SITE SER A	C	Interest	L	T					

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1038. - - Harrison, MI CMNTY SCHLS	C	Interest	L	T					
1039. - - Livingston CNTY MI RFDG	C	Interest			Sold	05/31/22	M		
1040. - - Oakland CNTY MI WTR SPPLY SYS RFDG	C	Interest			Sold	12/16/22	L		
1041. - - Sterling Heights MI CAP IMPT	A	Interest			Sold	12/16/22	K		
1042. - - Oakland CNTY MI WTR SPLY SYS	D	Interest	M	T					
1043. - - Monroe MI PUB SCHS BLDG	B	Interest			Sold	12/16/22	L		
1044. - - Ann Arbor MI CAP IMPT RFDG	B	Interest			Sold	05/02/22	L		
1045. - - Holt MI PUB SCHS BLDG	B	Interest			Sold	07/06/22	K		
1046. - - Warren MI TRANSN FD DB	B	Interest			Sold	07/27/22	M		
1047. - - Brighton MI CAP IMPT B/E	B	Interest			Sold	07/06/22	M		
1048. - - Michigan ST ENVMNTL PG SER A	D	Interest	M	T					
1049. - - Saginaw CNTY MI SER B	C	Interest	M	T					
1050. - - Manistique MI Area SCHS	B	Interest	L	T	Buy	05/04/22	L		
1051. - - Ionia CNTY MI RFDG B/E B/Q #462115SG2	A	Interest	K	T	Buy	09/21/22	K		
1052. - -East Lansing, MI RFDG B/E PTC #273335R68	B	Interest	K	T	Buy	09/08/22	K		
1053. - -Walled Lake, MI CONS SCH DIST BLDG & SITE #932423TW6	C	Interest	L	T	Buy	05/04/22	L		
1054. - -Kalamazoo, MI CAP IMP	B	Interest	K	T	Buy	08/12/22	K		

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1055. - - Bullock Creek MI SCH DIST	B	Interest	L	T	Buy	08/12/22	L		
1056. - -US Treasury Note	A	Interest	M	T	Buy	12/20/22	M		
1057. - - US Treasury Note	C	Interest	M	T	Buy	12/20/22	M		
1058. - - US Treasury Note	D	Interest	M	T	Buy	12/20/22	M		
1059. - - US Treasury Note	B	Interest	L	T	Buy	12/20/22	L		
1060. - - US Treasury Note	D	Interest	M	T	Buy	12/20/22	M		
1061. - - US Treasuary Note	B	Interest	L	T	Buy	12/20/22	L		
1062. - -US Treasury Note	A	Interest	K	T	Buy	12/20/22	K		
1063. Brokerage Acct #11 (U.S. TRUST) (lines 1064-1139) (H)									
1064. - - Federated Hermes Govt Obl Fund	C	Dividend	M	T					
1065. - - Ishares Core S&P 500 ETF	C	Dividend	N	T					
1066. - - Ishares Core S&P Mid Cap ETF	C	Dividend	M	T					
1067. - - CEF Ishares Core S&P Small Cap	B	Dividend	L	T					
1068. - - IShares MSCI EAFE ETF	C	Dividend	L	T					
1069. - - US Treasury Note 2.875%	D	Interest	N	T	Buy	09/12/22	N		
1070. - - US Treasury Note 3.25%	D	Interest	N	T	Buy	09/12/22	N		
1071. - - US Treasury Note 3.125%	D	Interest	N	T	Buy	09/12/22	N		

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1072. - - CMG Ultra Short Term Bond Fund	D	Int./Div.	O	T					
1073. - - Virginia College Bldg Auth VA REV BDS	A	Interest			Sold	02/01/22	M		
1074. - -Massashusetts State GO BDS	A	Interest			Sold	05/02/22	L		
1075. - - Orange Cnty NC Ltd Oblig Bds	B	Interest			Sold	10/03/22	L		
1076. - - Santa Fe Texas Indpt Sch Dist	B	Interest	L	T					
1077. - - Sedgwick County Kansas Sch Dist Bd	D	Interest	M	T					
1078. - - State Univ Iowa Rev Recreational Facs Rev	D	Interest	M	T					
1079. - - Montgomery Cnty MD REV REF REV BDS	B	Interest	L	T					
1080. - - Ohio State Cultural & Sports CAP Lease	B	Interest	L	T					
1081. - - University West Fla Fndtn Inc	B	Interest	L	T	Buy	10/20/22	L		
1082. - - Larimer Cnty CO Sch Dist NO GO REF BDS	B	Interest	L	T					
1083. - - Oshkosh WIS SWR SYS REV	B	Interest	L	T					
1084. - - Georgia St Higher Ed FACS Auth Rev	B	Interest	L	T	Buy	10/19/22	L		
1085. - - Allegheny Cnty PA GO REF BDS	B	Interest	L	T					
1086. - - WELD Cnty CO School Distr	C	Interest	M	T					
1087. - - Oak Creek-Franklin WIS JT SCH GO IMPT BLDG BDS	C	Interest	M	T					
1088. - - Washington State GO REF BDS	B	Interest	L	T					

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1089. - - Gainesville, FL UTIL SYS REV	B	Interest	L	T					
1090. - -Connecticut State GO BDS	C	Interest	M	T					
1091. - - Franklin Ftlg Rate Daily Access	C	Dividend	M	T					
1092. - Brokerage Account #11 US Trust Sub-Acct B (H)									
1093. - - Federated Hermes Govt Obl Fund	A	Int./Div.	J	T					
1094. - - Altria Group, Inc.	A	Dividend	J	T					
1095. - - AT&T	A	Dividend	J	T					
1096. - - Broadcom Inc.	A	Dividend	J	T					
1097. - - Chevron Corp	A	Dividend	J	T					
1098. - - Chubb Ltd	A	Dividend	J	T					
1099. - - Cisco Systems, Inc.	A	Dividend	J	T					
1100. - - Citigroup Inc.	A	Dividend	J	T					
1101. - - Comcast Corp Nwe CLA A	A	Dividend	J	T	Buy	05/03/22	J		
1102. - - Conoco Philips	A	Dividend	J	T					
1103. - - Dominion Energy Inc.	A	Dividend	J	T	Buy	11/07/22	J		
1104. - - DowDupont, Inc.	A	Dividend	J	T					
1105. - - Duke Energy Corp	A	Dividend	J	T					

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1106. - - Exxon Mobil Corp	A	Dividend	J	T					
1107. - - General Dynamics Corp	A	Dividend	J	T					
1108. - - Intel Corp	A	Dividend	J	T					
1109. - - Johnson & Johnson	A	Dividend	J	T					
1110. - - JP Morgan Chase & Co	A	Dividend	J	T					
1111. - - Kimberly Clark	A	Dividend	J	T					
1112. - - Lilly Eli & Co	A	Dividend			Sold	06/28/22	J	B	
1113. - - Lowes Cos Inc.	A	Dividend	J	T					
1114. - -Merck & Co Inc.	A	Dividend	J	T					
1115. - - Microsoft Corp.	A	Dividend	J	T					
1116. - -Morgan Stanley	A	Dividend	J	T					
1117. - - Nextera Energy	A	Dividend	J	T					
1118. - - Philip Morris Intl	A	Dividend	J	T					
1119. - - Pfizer, Inc.	A	Dividend	J	T					
1120. - - PNC Financial Services Group	A	Dividend	J	T					
1121. - - Raytheon Co.	A	Dividend	J	T					
1122. - - Target Corp	A	Dividend	J	T					

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1123. - - Travelers Cos, Inc.	A	Dividend	J	T					
1124. - - Truist Financial Corp	A	Dividend	J	T					
1125. - - United Parcel Svc	A	Dividend	J	T					
1126. - - Vici Properties Inc.	A	Dividend	J	T					
1127. - - Wallgreens Boots Alliance, Inc.	A	Dividend			Sold	08/08/22	J		
1128. - - 3M Co.	A	Dividend	J	T					
1129. - - Boston PPTYS Inc.	A	Dividend	J	T	Buy	02/11/22	J		
1130. - -Genuine Parts Co.	A	Dividend	J	T					
1131. - - BCE Inc New	A	Dividend	J	T					
1132. - - Diagio PLC	A	Dividend	J	T					
1133. - - Johnson Controls Intl PLC	A	Dividend	J	T					
1134. - - Medtronic PLC	A	Dividend	J	T					
1135. - - Novartis AG	A	Dividend	J	T					
1136. - - Siemens AG	A	Dividend	J	T					
1137. - - Unilever NV	A	Dividend	J	T					
1138. - - Healthpeak Pptys Inc.	A	Dividend	J	T					
1139. - - Welltower, Inc. REITS	A	Dividend			Sold	02/11/22	J	B	

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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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Name of Person Reporting	Date of Report
White, Helene N.	08/15/2024

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1140. 2018-2 TR (lines 1141-1143) (H)									
1141. - Morgan Stanley Bank Deposit Program #061870903	A	Interest			Distributed	03/03/22	O		
1142. - - Fidelity Government Cash Reserves	A	Dividend	J	T	Open	03/03/22	J		
1143. - - Mainstay Mackay Short Term Numi Fund	D	Dividend	O	T	Buy	09/22/22	O		
1144. 529 Plan #1 - [redacted] (Scholar's Choice Age Based - 2009)		None	M	T					Non-UTMA (no mandated use)
1145. 529 Plan #2 - [redacted] (Scholar's Choice Age Based - 2009)		None	J	T					Non-UTMA (no mandated use)
1146. 529 Plan #5 - [redacted] (Scholar's Choice Age Based - 2013)		None	L	T					Non-UTMA (no mandated use)
1147. 529 Plan #6 - [redacted] (Scholar's Choice Age Based - 2020)		None	K	T					Non-UTMA (no mandated use)
1148. Brokerage Acct #13 Merrill Lynch (H) (lines 1149-1153)									
1149. - - Merrill Lynch CMA Funds	A	Interest	K	T					
1150. - - Blackrock Muni, Inc.	B	Dividend	K	T					
1151. - - Franklin FL Tax Free	D	Dividend	M	T					
1152. IRA - Morgan Stanley									
1153. - - MS Focus Growth Fd A	A	Dividend	J	T					
1154. Home Properties, LLC (Oak Park, MI) (H)									
1155. - - Real Property Oak Park Michigan	F	Rent	N	R					
1156. Well Zoo LLC (Equity Interest)		None	J	T					

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1157. RCF Telecom (Membership Interest)		None	J	T					
1158. Unit 610, LLC (Membership Interest) [redacted] Colorado		None			Sold	08/22/22	O	G	Phalanx Investments LLC
1159. HBF Investments, LLC (Membership Interest) condominium compl	E	Distribution	M	T					
1160. The Pickle Recipe, LLC	A	Int./Div.	J	U					
1161. Grosvenor Multi-Strategy Fund, L.P.	G	Int./Div.	P1	T					
1162. Membership Interest in Clay School Building, LLC		None	K	U					
1163. Promissory Note - Clay School Building, LLC		None	P1	U					
1164. Digerati		None	L	T					
1165. Membership interest in [redacted] Ventures LLC		None	P1	U					
1166. WWLFAP, LLC (H) (lines 1167-1174)									
1167. - - Artwork: Rudolph Stingel Painting: untitled		None	P1	W					
1168. - - Artwork: George Condo Painting: Blue Expanding		None			Sold	10/21/21	P1	A	
1169. - - Artwork: Albert Oehlen Painting: Gestohlenes Zeug		None	P1	W					
1170. - - Artwork: George Condo Painting: Coversations		None	P1	W					
1171. - - Artwork: George Baselitz: Auf dem Berge, spitz		None	P1	W					
1172. - - Artwork: Wade Guyton Painting: untitled		None			Sold	09/11/21	O	A	
1173. - - Artwork: Hiquily Sculpture		None			Sold	04/25/22	O	A	

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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)	
1174. - - Artwork: Rashid Johnson - The Crowd		None	O	W	Buy	08/22/22	O		

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

Name of Person Reporting	Date of Report
White, Helene N.	08/15/2024

IX. CERTIFICATION.

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

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

Signature: s/ Helene N. White

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
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