

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2020

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

1. Person Reporting (last name, first, middle initial) Freeman, Beth L.	2. Court or Organization U. S. District Court, Northern District of California	3. Date of Report 05/09/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Judge - Active Status	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2020 to 12/31/2020
7. Chambers or Office Address U. S. District Court 280 South First St. San Jose, CA 95113		
IMPORTANT NOTES: The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.		

I. POSITIONS. (Reporting individual only; see pp. 9-13 of filing instructions)

☐ NONE (No reportable positions.)

<u>POSITION</u>	<u>NAME OF ORGANIZATION/ENTITY</u>
1. Member, Board of Governors	Association of Business Trial Lawyers
2. Director, Secretary	Junior State of America Foundation
3. Co-Trustee	Freeman Family Trust
4. Director	Federal Practice Program
5.	

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

☐ NONE (No reportable agreements.)

<u>DATE</u>	<u>PARTIES AND TERMS</u>
1. 1983	San Mateo County Employees' Retirement Association - Pension
2.	
3.	

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

A. Filer's Non-Investment Income

☐

NONE (No reportable non-investment income.)

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (yours, not spouse's)
1. 2020	San Mateo County Employees' Retirement Association - Pension	\$88,956.00
2. 2020	State of California payment of wages owed as a result of litigation for state court judges	\$3,728.00
3.		
4.		

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

(Dollar amount not required except for honoraria.)

☐

NONE (No reportable non-investment income.)

<u>DATE</u>	<u>SOURCE AND TYPE</u>
1. 2020	Jones Day Qualified Defined Benefit Pension Plan - Pension
2.	
3.	
4.	

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

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

☒

NONE (No reportable reimbursements.)

<u>SOURCE</u>	<u>DATES</u>	<u>LOCATION</u>	<u>PURPOSE</u>	<u>ITEMS PAID OR PROVIDED</u>
1.				
2.				
3.				
4.				
5.				

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V. GIFTS. (Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)

☒ NONE (No reportable gifts.)

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

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

☒ NONE (No reportable liabilities.)

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

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

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

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. Freeman Aggregate (H)									
2. - DFA US Core Equity I Institutional	A	Dividend	K	T					
3. - SPDR S&P 500 ETF	D	Dividend	N	T					
4. - Schwab Total Stock Market Index Fund	A	Dividend	K	T					
5. - Vanguard Dividend Appreciation ETF	B	Dividend	L	T					
6. - Vanguard Growth Index Fund Admiral Shares	A	Dividend	L	T					
7. - Vanguard Total Stock Market ETF	D	Dividend	N	T					
8. - Artisan International Fund Advisor Class					Sold	03/19/20	J		
9. - Vanguard FTSE All World ex-US ETF	A	Dividend	K	T					
10. - Vanguard Developed Markets ETF	B	Dividend	L	T					
11. - iShares MSCI Pacific ex-Japan ETF	A	Dividend	K	T					
12. - FPA Crescent Fund	B	Dividend	K	T					
13. - Stone Ridge Reinsurance Risk Premium Fund	A	Dividend	K	T	Sold (part)	02/28/20	L		
14.					Sold (part)	05/29/20	J		
15.					Sold (part)	08/21/20	J		
16.					Sold (part)	11/20/20	J		
17. - RiverPark Short Term High Yield Fund	D	Dividend	O	T	Buy (add'l)	04/23/20	L		

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

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

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	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
18.					Buy (add'l)	07/29/20	K		
19.					Buy (add'l)	11/09/20	N		
20. - Shenkman Short Duration High Income	E	Dividend	O	T	Sold (part)	04/23/20	M		
21.					Buy (add'l)	11/09/20	M		
22.					Buy (add'l)	12/31/20	J		
23. - DoubleLine Total Return Bond Fund	E	Dividend	O	T	Sold (part)	01/30/20	O	E	
24.					Sold (part)	04/23/20	N	A	
25.					Buy (add'l)	07/29/20	K		
26.					Buy (add'l)	11/09/20	M		
27.					Buy (add'l)	12/31/20	J		
28. - Voya Securitized Credit Fund	E	Dividend	O	T	Buy (add'l)	04/23/20	L		
29.					Buy (add'l)	07/29/20	J		
30.					Buy (add'l)	11/09/20	M		
31.					Buy (add'l)	12/31/20	J		
32. - Schwab Government Money Market Fund		None	J	T	Sold (part)	01/23/20	J		
33.					Buy (add'l)	03/20/20	J		
34.					Sold (part)	03/23/20	J		

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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35.					Sold (part)	06/21/20	J		
36.					Buy (add'l)	07/23/20	J		
37. - AbbVie Inc Common Stock	B	Dividend	L	T					
38. - Abbott Laboratories Common Stock	A	Dividend	L	T					
39. - Apple Inc Common Stock	D	Dividend	P1	T					
40. - CVS Corporation Common Stock	C	Dividend	M	T					
41. - Coca Cola Co. Common Stock	C	Dividend	L	T	Sold (part)	01/30/20	K		
42. - Colgate-Palmolive Co. Common Stock	A	Dividend			Sold	01/30/20	K	E	
43. - Comcast Corp. New Common Stock	D	Dividend	N	T					
44. - MasterCard Inc Common Stock	A	Dividend	M	T					
45. - McDonald Corp Common Stock	B	Dividend	L	T					
46. - Microsoft Corp Common Stock	D	Dividend	O	T					
47. - Pepsico, Inc Common Stock	D	Dividend	N	T					
48. - Procter & Gamble Co Common Stock	C	Dividend	M	T					
49. - TJX Companies Inc Common Stock		None	L	T					
50. - Visa, Inc Common Stock	B	Dividend	N	T					
51. - Walgreens Boots Alliance Inc Common Stock					Sold	01/30/20	K	D	

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52. - FSC Retreat at Conroe, Conroe, TX (2014 \$75,000)	C	Rent	L	W					
53. - FSC Estates at Canyon Ridge, San Antonio, TX (2014 \$75,000)		None	L	W					
54. - FSC Granada Hills, Los Angeles, CA (2015 \$75,000)	C	Rent	L	W					
55. - FSC Brightwater, Seattle, WA (2016 \$75,000)	C	Rent	L	W					
56. - FSC La Paloma, Alburquerque, NM (2016 \$75,000)	D	Rent	L	W					
57. - FSC Still Waters, Austin, TX (2017 \$125,000)	D	Rent	M	W					
58. - FSC Old California, Austin, TX (2019 \$130,000)	C	Rent	M	W					
59. - Elements US Small Cap Portfolio					Sold (part)	03/19/20	M		
60.					Sold	04/22/20	M		
61. - Elements International Portfolio					Sold (part)	01/23/20	J		
62.					Sold (part)	03/19/20	O		
63.					Sold	04/22/20	N		
64. - Elements International Small Cap Portfolio					Sold (part)	03/19/20	K		
65.					Sold	04/22/20	M		
66. - Elements Emerging Markets Portfolio					Sold	04/22/20	N		
67. - CrossBridge Low Duration High Yield Fund	E	Dividend	O	T	Buy (add'l)	04/23/20	L		
68. - Robinson Tax Advantaged Income Fund	C	Dividend			Sold (part)	01/27/20	N		

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69.					Sold (part)	02/27/20	M	D	
70.					Buy (add'l)	04/23/20	K		
71.					Sold (part)	07/22/20	M		
72.					Sold	07/29/20	L	A	
73. - Goldman Sachs MLP Energy Infrastructure Fund	D	Dividend			Buy (add'l)	02/04/20	M		
74.					Sold	04/01/20	M		
75. - Doubleline Strategic Commodity Fund					Sold	04/01/20	N		
76. - Brookfield Center Coast MLP Fund	B	Dividend			Sold	02/04/20	M		
77. - RiverPark Floating Rate CMBS Fund	E	Dividend			Buy (add'l)	01/30/20	O		
78.					Buy (add'l)	05/23/20	N		
79.					Buy (add'l)	07/29/20	J		
80.					Sold	11/09/20	O	C	
81. - Vanguard FTSE All World Ex-US Small Cap Index Fund	D	Dividend	N	T	Buy (add'l)	03/19/20	K		
82.					Buy (add'l)	04/22/20	K		
83.					Buy (add'l)	07/27/20	K		
84. - Vanguard Emerging Markets Fund	B	Dividend	M	T	Buy (add'l)	04/22/20	K		
85.					Buy (add'l)	07/27/20	K		

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86. - Vanguard 500 Index Fund	D	Dividend	P1	T	Buy	04/22/20	O		
87.					Buy (add'l)	04/23/20	K		
88.					Buy (add'l)	05/14/20	J		
89.					Buy (add'l)	07/27/20	M		
90. - Vanguard Developed Markets Index Fund	E	Dividend	P1	T	Buy	03/19/20	O		
91.					Buy (add'l)	04/22/20	L		
92.					Buy (add'l)	07/27/20	K		
93. - Vanguard Small Cap Index Fund	C	Dividend	N	T	Buy	03/19/20	M		
94.					Buy (add'l)	04/22/20	L		
95.					Buy (add'l)	07/27/20	K		
96. - Variant Alternative Income Fund	E	Dividend	P1	T	Buy	01/28/20	N		
97.					Buy (add'l)	02/28/20	M		
98.					Buy (add'l)	07/22/20	O		
99. - Cohen and Steers Institutional Realty Shares Fund	E	Dividend			Buy	04/01/20	O		
100.					Buy (add'l)	04/23/20	K		
101.					Sold (part)	07/22/20	N		
102.					Sold	07/27/20	N	E	

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103. - Charles Schwab Bank Cash Account	A	Interest	M	T					
104. Charitable Gift Account (H)									
105. - Schwab Charitable Equity Index Pool		None	J	T	Sold (part)	01/29/20	J		
106.					Buy (add'l)	09/10/20	J		
107.					Sold (part)	09/15/20	J		
108.					Sold (part)	10/06/20	J		
109. - Schwab Charitable Income Pool		None	K	T	Sold (part)	01/29/20	J		
110.					Buy (add'l)	09/10/20	K		
111.					Sold (part)	09/15/20	J		
112.					Sold (part)	10/06/20	J		
113. - Schwab Charitable International Pool		None	J	T	Sold (part)	01/29/20	J		
114.					Buy (add'l)	09/10/20	J		
115.					Sold (part)	09/15/20	J		
116.					Sold (part)	10/06/20	J		
117. - Schwab Charitable Money Market Pool		None	K	T	Sold (part)	01/29/20	J		
118.					Buy (add'l)	09/10/20	K		
119.					Sold (part)	09/15/20	J		

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(See Columns B1 and D4)	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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(See Columns C1 and D3)	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	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
(See Column C2)	U =Book Value	V =Other	W =Estimated		

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

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

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
120.					Sold (part)	10/06/20	J		
121. - Schwab Charitable Short Term Income Pool		None	K	T	Sold (part)	01/29/20	J		
122.					Buy (add'l)	09/10/20	K		
123.					Sold (part)	09/15/20	J		
124.					Sold (part)	10/06/20	J		
125. New Heights Associates LLV (Inherited)		None	M	W					
126. Jones Day Capital Account	A	Int./Div.	J	U					
127. Jones Day 2015 Fund		None	N	T					
128. Wells Fargo Bank Checking Account	A	Int./Div.	M	T					

1 Income Gain Codes:	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
(See Columns B1 and D4)	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	J =\$15,000 or less	K =\$15,001 - \$50,000	L =\$50,001 - \$100,000	M =\$100,001 - \$250,000	
(See Columns C1 and D3)	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	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
(See Column C2)	U =Book Value	V =Other	W =Estimated		

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Freeman, Beth L.

Date of Report

05/09/2021

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

Part I line 2. Junior Statesmen Foundation changed its name to Junior State of America Foundation

Part VII line 10. Renamed from Vanguard FTSE Developed Markets ETF

FINANCIAL DISCLOSURE REPORT

Page 13 of 13

Name of Person Reporting

Freeman, Beth L.

Date of Report

05/09/2021

IX. CERTIFICATION.

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

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. app. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ **Beth L. Freeman**

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 104)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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Washington, D.C. 20544