

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) Scudder, Jr., Michael Y.	2. Court or Organization Circuit Court - Seventh Circuit	3. Date of Report 05/12/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Article III Judge	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 219 S. Dearborn Street, Room 2648 Chicago, IL 60604		
IMPORTANT NOTES: The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.		

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

☐ NONE (No reportable positions.)

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

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

☒ NONE (No reportable agreements.)

<u>DATE</u>	<u>PARTIES AND TERMS</u>
1.	
2.	
3.	

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Name of Person Reporting

Scudder, Jr., Michael Y.

Date of Report

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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	University of Chicago Law School - Teaching	\$14,000.00
2. 2020	Northwestern University Pritzker School of Law - Teaching	\$13,750.00
3.		
4.		

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

(Dollar amount not required except for honoraria.)

☒

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

<u>DATE</u>	<u>SOURCE AND TYPE</u>
1.	
2.	
3.	
4.	

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

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

☒

NONE *(No reportable reimbursements.)*

<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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Scudder, Jr., Michael Y.	05/12/2021

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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Name of Person Reporting

Scudder, Jr., Michael Y.

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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)	(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)
1. JPMorgan Chase Bank Account #1 (cash account)	A	Interest	K	T					
2. JPMorgan Chase Bank Account #2 (cash account)	A	Interest	L	T					
3. JPMorgan Chase Bank Account #3 (cash account)	A	Interest			Closed	06/15/20	J		
4. Navy Federal Credit Union Account (cash account)	A	Int./Div.	J	T					
5. JPMorgan Chase Bank Account #4 (cash account)	A	Interest	J	T	Open	07/01/20	J		
6. JPMorgan Chase Bank Account #5 (cash account)	A	Interest	J	T	Open	07/01/20	J		
7. PNC Bank Account #1 (cash account)	A	Interest	J	T					
8. Bank of America Account #1 (cash account)	A	Interest	J	T					
9. Bank of America Account #2 (cash account)	A	Interest	J	T					
10. Citi Private Bank Investment Account (H)									
11. - Western Asset Institutional Government Money Market Deposit Account	A	Interest	K	T					
12. - iShares Gold TR iShares (IAU)		None	J	T	Buy (add'l)	02/04/20	J		
13.					Buy (add'l)	04/06/20	J		
14.					Sold (part)	05/07/20	J	D	
15.					Sold (part)	06/29/20	J	A	
16.					Sold (part)	09/02/20	J	A	
17.					Buy (add'l)	12/01/20	J		

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.)

☐ 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)
18. - iShares TR Russell 1000 Value ETF (IWD)	B	Dividend	M	T	Sold (part)	02/04/20	J	B	
19.					Buy (add'l)	04/06/20	J		
20.					Sold (part)	05/07/20	J		
21.					Buy (add'l)	06/29/20	J		
22.					Sold (part)	09/02/20	J	A	
23.					Sold (part)	12/01/20	J	B	
24. - iShares TR Russell 1000 Growth ETF (IWF)	A	Dividend	M	T	Sold (part)	02/04/20	K	D	
25.					Buy (add'l)	04/06/20	J		
26.					Sold (part)	05/07/20	J	C	
27.					Sold (part)	06/29/20	J	C	
28.					Sold (part)	09/02/20	K	D	
29.					Buy (add'l)	12/01/20	J		
30. - iShares TR Russell 2000 ETF (IWM)	A	Dividend	K	T	Buy (add'l)	02/04/20	J		
31.					Buy (add'l)	04/06/20	J		
32.					Sold (part)	05/07/20	J		
33.					Sold (part)	06/29/20	J	A	
34.					Sold (part)	09/02/20	J	A	

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		

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)
35.					Buy (add'l)	12/01/20	J		
36. - iShares TR MSCI All Country Asia Ex Japan ETF (AAXJ)		None			Buy	02/04/20	J		
37.					Sold	04/06/20	J		
38. - iShares TR JPMorgan USD Emerging Markets Bond ETF (EMB)	C	Dividend	L	T	Buy (add'l)	02/04/20	J		
39.					Buy (add'l)	04/06/20	J		
40.					Sold (part)	06/29/20	J		
41.					Buy (add'l)	09/02/20	J		
42.					Buy (add'l)	12/01/20	J		
43. - PIMCO ETF TR Enhanced Short Maturity Active ETF (MINT)	A	Dividend	K	T	Sold (part)	02/04/20	J	A	
44.					Sold (part)	04/06/20	J		
45.					Buy (add'l)	05/07/20	J		
46.					Sold (part)	06/29/20	K	A	
47.					Buy (add'l)	09/02/20	J		
48.					Buy (add'l)	12/01/20	J		
49. - SPDR Bloomberg Barclays High Yield Bond ETF (JNK)	B	Dividend	K	T	Buy (add'l)	02/04/20	J		
50.					Buy (add'l)	04/06/20	J		
51.					Sold (part)	05/07/20	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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52.					Buy (add'l)	06/29/20	J		
53.					Buy (add'l)	09/02/20	J		
54.					Buy (add'l)	12/01/20	J		
55. - SPDR Nuveen Bloomberg Barclays Municipal Bond ETF (TFI)	A	Dividend	N	T	Sold (part)	02/04/20	J	A	
56.					Sold (part)	04/06/20	J	A	
57.					Buy (add'l)	05/07/20	J		
58.					Sold (part)	06/29/20	J	A	
59.					Buy (add'l)	09/02/20	J		
60.					Sold (part)	12/01/20	J	A	
61. - SPDR Nuveen Bloomberg Barclays Short Term Municipal Bond ETF (SHM)	A	Dividend	N	T	Buy (add'l)	02/04/20	J		
62.					Sold (part)	04/06/20	K	A	
63.					Buy (add'l)	05/07/20	K		
64.					Sold (part)	06/29/20	J	A	
65.					Buy (add'l)	09/02/20	J		
66.					Sold (part)	12/01/20	J	A	
67. - Vanguard Specialized Funds Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	K	T	Buy (add'l)	02/04/20	K		
68.					Buy (add'l)	04/06/20	J		

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69.					Sold (part)	05/07/20	J		
70.					Buy (add'l)	06/29/20	J		
71.					Sold (part)	09/02/20	J	A	
72.					Sold (part)	12/01/20	J	A	
73. - Vanguard FTSE Developed Markets ETF (VEA)	C	Dividend	M	T	Buy (add'l)	02/04/20	J		
74.					Buy (add'l)	04/06/20	J		
75.					Sold (part)	05/07/20	J		
76.					Buy (add'l)	06/29/20	J		
77.					Buy (add'l)	09/02/20	J		
78.					Sold (part)	12/01/20	J	A	
79. - Vanguard Int'l Equity Index FDS FTSE Emerging Markets ETF (VWO)	B	Dividend	L	T	Sold (part)	02/04/20	J	A	
80.					Buy (add'l)	04/06/20	J		
81.					Buy (add'l)	05/07/20	J		
82.					Buy (add'l)	06/29/20	J		
83.					Sold (part)	09/02/20	J	A	
84.					Sold (part)	12/01/20	J	A	
85. - iShares TR Core S&P Small-Cap ETF (IJR)	A	Dividend	K	T	Buy	05/07/20	J		

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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	
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86.					Buy (add'l)	06/29/20	J		
87.					Sold (part)	09/02/20	J	A	
88.					Sold (part)	12/01/20	J	A	
89. - iShares TR Global REIT ETF (REET)	A	Dividend	J	T	Buy	06/29/20	J		
90.					Buy (add'l)	09/02/20	J		
91.					Sold (part)	12/01/20	J	A	
92. - iShares TR Latin America 40 ETF (ILF)	A	Dividend	J	T	Buy	12/01/20	J		
93. - iShares TR MSCI EAFE Small Cap ETF (SCZ)	A	Dividend	J	T	Buy	12/01/20	J		
94. Citi Private Bank Individual Retirement Account #1 (H)									
95. - Western Asset Institutional Government Money Market Deposit Account	A	Interest	J	T					
96. - iShares Gold TR iShares (IAU)		None	J	T	Buy (add'l)	02/04/20	J		
97.					Buy (add'l)	04/06/20	J		
98.					Sold (part)	05/07/20	J	A	
99.					Sold (part)	06/29/20	J	A	
100.					Buy (add'l)	09/02/20	J		
101.					Buy (add'l)	12/01/20	J		
102. - iShares MSCI All Country Asia ex Japan ETF (AAXJ)	A	Dividend			Buy (add'l)	02/04/20	J		

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
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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)
103.					Sold	04/06/20	J		
104. - PIMCO ETF TR Enhanced Short Maturity Active ETF (MINT)	A	Dividend	J	T	Sold (part)	02/04/20	J	B	
105.					Sold (part)	04/06/20	J		
106.					Buy (add'l)	05/07/20	J		
107.					Sold (part)	06/29/20	J	B	
108.					Buy (add'l)	09/02/20	J		
109.					Buy (add'l)	12/01/20	J		
110. - iShares TR Russell 1000 Value ETF (IWD)	B	Dividend	L	T	Sold (part)	02/04/20	J	B	
111.					Sold (part)	04/06/20	J		
112.					Sold (part)	05/07/20	J		
113.					Buy (add'l)	06/29/20	J		
114.					Buy (add'l)	09/02/20	J		
115.					Sold (part)	12/01/20	J	A	
116. - iShares TR Russell 1000 Growth ETF (IWF)	A	Dividend	L	T	Sold (part)	02/04/20	J	D	
117.					Buy (add'l)	04/06/20	J		
118.					Sold (part)	05/07/20	J	B	
119.					Sold (part)	06/29/20	J	B	

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

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)	09/02/20	J	C	
121.					Buy (add'l)	12/01/20	J		
122. - iShares TR Russell 2000 ETF (IWM)	A	Dividend	K	T	Buy (add'l)	02/04/20	J		
123.					Buy (add'l)	04/06/20	J		
124.					Sold (part)	05/07/20	J		
125.					Sold (part)	06/29/20	J	A	
126.					Sold (part)	09/02/20	J	A	
127.					Buy (add'l)	12/01/20	J		
128. - iShares TR JPMorgan USD Emerging MKTs Bond ETF (EMB)	A	Dividend			Sold (part)	02/04/20	J	A	
129.					Buy (add'l)	04/06/20	J		
130.					Buy (add'l)	05/07/20	J		
131.					Sold (part)	06/29/20	J	A	
132.					Sold (part)	09/02/20	J	A	
133.					Sold	12/01/20	J	A	
134. - Vanguard Total Bond Market ETF (BND)	A	Dividend	J	T	Sold (part)	02/04/20	J	A	
135.					Sold (part)	04/06/20	J	A	
136.					Buy (add'l)	05/07/20	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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Name of Person Reporting

Scudder, Jr., Michael Y.

Date of Report

05/12/2021

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)
137.					Sold (part)	06/29/20	K	B	
138.					Sold (part)	09/02/20	J	A	
139.					Sold (part)	12/01/20	J	A	
140. - Vanguard FTSE Developed Markets ETF (VEA)	B	Dividend	L	T	Buy (add'l)	02/04/20	J		
141.					Sold (part)	04/06/20	J		
142.					Sold (part)	05/07/20	J		
143.					Buy (add'l)	06/29/20	J		
144.					Buy (add'l)	09/02/20	J		
145.					Buy (add'l)	12/01/20	J		
146. - Vanguard Charlotte FDS Total International Bond ETF (BNDX)	A	Dividend			Sold	02/04/20	J	A	
147. - Vanguard Int'l Equity Index FDS FTSE Emerging Markets ETF (VWO)	A	Dividend	K	T	Buy (add'l)	02/04/20	J		
148.					Buy (add'l)	04/06/20	J		
149.					Buy (add'l)	05/07/20	J		
150.					Buy (add'l)	06/29/20	J		
151.					Sold (part)	09/02/20	J	A	
152.					Buy (add'l)	12/01/20	J		
153. - Vanguard Specialized Funds Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	K	T	Buy	02/04/20	K		

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		

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Name of Person Reporting

Scudder, Jr., Michael Y.

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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)	(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)
154.					Buy (add'l)	04/06/20	J		
155.					Buy (add'l)	06/29/20	J		
156.					Sold (part)	09/02/20	J	A	
157. - iShares TR Latin America 40 ETF (ILF)	A	Dividend	J	T	Buy	05/07/20	J		
158.					Sold (part)	06/29/20	J	A	
159.					Buy (add'l)	09/02/20	J		
160.					Buy (add'l)	12/01/20	J		
161. - iShares TR Core S&P Small Cap ETF (IJR)	A	Dividend	J	T	Buy	05/07/20	J		
162.					Sold (part)	06/29/20	J	A	
163.					Sold (part)	09/02/20	J	A	
164.					Sold (part)	12/01/20	J	A	
165. - iShares TR Global REIT ETF (REET)	A	Dividend	J	T	Buy	06/29/20	J		
166.					Buy (add'l)	09/02/20	J		
167.					Sold (part)	12/01/20	J	A	
168. - iShares TR Mortgage Real Estate ETF (REM)	A	Dividend	J	T	Buy	06/29/20	J		
169.					Buy (add'l)	09/02/20	J		
170.					Sold (part)	12/01/20	J	A	

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	

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Name of Person Reporting

Scudder, Jr., Michael Y.

Date of Report

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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)	(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)
171. - SPDR SER TR Bloomberg Barclays High Yield BD ETF (JNK)	A	Dividend	J	T	Buy	06/29/20	J		
172.					Sold (part)	09/02/20	J	A	
173.					Sold (part)	12/01/20	J	A	
174. - iShares TR MSCI EAFE Small Cap ETF (SCZ)	A	Dividend	J	T	Buy	12/01/20	J		
175. TD Ameritrade Investment Account #1 (H)									
176. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
177. - Invesco BulletShares 2020 Corp Bond ETF (BSCK)	A	Dividend			Sold	02/25/20	L		
178. - Invesco BulletShares 2021 Corp Bond ETF (BSCL)	A	Dividend			Sold	02/25/20	L	A	
179. - Invesco BulletShares 2022 Corp Bond ETF (BSCM)	A	Dividend			Sold	02/25/20	K	B	
180. - DoubleLine Low Duration Bond Fund (DBLSX)	B	Dividend	L	T	Sold (part)	03/16/20	K		
181.					Sold (part)	04/07/20	J		
182.					Sold (part)	09/23/20	K		
183. - Wisdom Tree Emerging Markets High Div (DEM)	A	Dividend			Buy (add'l)	02/25/20	J		
184.					Buy (add'l)	03/16/20	J		
185.					Sold (part)	04/07/20	J		
186.					Sold	05/05/20	J	A	
187. - DoubleLine Flexible Income Fund I (DFLEX)	A	Dividend			Buy (add'l)	01/10/20	J		

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.)

☐

 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)
188.					Sold (part)	03/16/20	J		
189.					Sold	04/07/20	K		
190. - Wisdom Tree US Quality Divident Growth ETF (DGRW)	A	Dividend	K	T	Buy	02/25/20	K		
191.					Buy (add'l)	03/16/20	J		
192.					Sold (part)	04/07/20	J		
193.					Sold (part)	07/27/20	J	A	
194.					Sold (part)	11/05/20	J	A	
195.					Sold (part)	12/14/20	J	A	
196. - Wisdom Tree International LargeCap Dividend Fund (DOL)	A	Dividend			Buy (add'l)	03/16/20	J		
197.					Sold (part)	04/07/20	J		
198.					Sold (part)	07/27/20	J		
199.					Sold	11/05/20	K		
200. - iShares EAFE Growth ETF (EFG)	A	Dividend	J	T	Buy	11/05/20	J		
201.					Sold (part)	12/14/20	J	A	
202. - SPDR DoubleLine Emerging Market Debt ETF (EMTL)	B	Dividend	K	T	Buy	02/25/20	L		
203.					Sold (part)	04/07/20	J		
204.					Sold (part)	07/27/20	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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Name of Person Reporting

Scudder, Jr., Michael Y.

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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)
205.					Sold (part)	12/14/20	K		
206. - Wisdom Tree US Large Cap ETF (EPS)	A	Dividend			Buy	02/25/20	K		
207.					Sold	03/16/20	K		
208. - Wisdom Tree US Total Market Fund (RESP)	A	Dividend			Sold	02/25/20	K	B	
209. - SPDR Bloomberg Barclays Investment Grade Floating Rate ETF (FLRN)	A	Dividend			Buy (add'l)	02/25/20	K		
210.					Sold	03/16/20	L		
211. - Federated Government Obligations Fund (GOSXX)	A	Dividend			Buy	03/24/20	M		
212.					Sold	05/05/20	M		
213. - iShares US Treasury Bond ETF (GOVT)	B	Dividend	L	T	Buy	02/25/20	M		
214.					Sold (part)	03/16/20	K	A	
215.					Buy (add'l)	06/25/20	J		
216.					Sold (part)	07/27/20	J	A	
217.					Sold (part)	11/05/20	K	B	
218.					Sold (part)	12/14/20	J	A	
219. - iShares Core High Dividend ETF (HDV)	A	Dividend			Sold	02/25/20	K	B	
220. - iShares Gold Trust (IAU)		None	L	T	Buy (add'l)	03/16/20	J		
221.					Sold (part)	03/23/20	J	A	

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	

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Name of Person Reporting

Scudder, Jr., Michael Y.

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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)	(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)
222.					Buy (add'l)	04/07/20	K		
223.					Sold (part)	07/31/20	J	B	
224.					Buy (add'l)	09/03/20	J		
225.					Buy (add'l)	11/05/20	J		
226. - Wisdom Tree International Quality Dividend ETF (IQDG)	A	Dividend	J	T	Buy	11/05/20	J		
227.					Sold (part)	12/14/20	J	A	
228. - JPMorgan Hedged Equity Fund (JHEQX)	A	Dividend	M	T	Buy	11/05/20	M		
229.					Sold (part)	12/14/20	J	A	
230. - JPMorgan Ultra Short Income ETF (JPST)	B	Dividend	M	T	Buy	05/25/20	M		
231.					Sold (part)	07/27/20	K	A	
232.					Sold (part)	12/14/20	J	A	
233. - SPDR SSGA U.S. Large Cap Low Volatility Index ETF (LGLV)	A	Dividend			Sold (part)	01/10/20	J	A	
234.					Buy (add'l)	03/16/20	J		
235.					Buy (add'l)	03/23/20	J		
236.					Sold (part)	04/07/20	J	A	
237.					Sold	05/05/20	K	B	
238. - Lord Abbett Funds Ultra Short Bond Fund (LUBAX)	A	Dividend	M	T	Buy	06/25/20	M		

1 Income Gain Codes: (See Columns B1 and D4)	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	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
2 Value Codes (See Columns C1 and D3)					
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value				

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Name of Person Reporting

Scudder, Jr., Michael Y.

Date of Report

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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)
239. - iShares US Short Maturity Bond ETF (NEAR)	A	Dividend			Buy	02/25/20	M		
240.					Sold (part)	03/16/20	J		
241.					Sold (part)	03/20/20	K		
242.					Sold	03/23/20	L		
243. - Federated Drive Cash Obligations Fund (PRCXX)	A	Dividend			Buy (add'l)	01/10/20	J		
244.					Sold	02/25/20	M		
245.					Buy	05/05/20	M		
246.					Sold	06/25/20	M		
247. - iShares AAA-A Investment Grade Corp Bond ETF (QLTA)	B	Dividend	K	T	Buy	04/08/20	M		
248.					Sold (part)	07/27/20	K	B	
249.					Sold (part)	11/05/20	L	C	
250.					Sold (part)	12/14/20	J	A	
251. - Wisdom Tree US Short-Term High Yield ETF (SFHY)	A	Dividend			Sold	02/25/20	L		
252. - iShares Short Treasury Bond ETF (SHV)	A	Dividend			Buy	03/20/20	L		
253.					Buy (add'l)	04/07/20	K		
254.					Sold	05/05/20	M		
255. - iShares Trust 0-5 YR High Yield Corporate Bond ETF (SHYG)	A	Dividend			Buy	02/25/20	L		

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

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)
256.					Buy (add'l)	03/16/20	J		
257.					Sold	04/06/20	L		
258. - SSGA Ultra Short Term Bond ETF (ULST)	A	Dividend			Buy	02/25/20	L		
259.					Sold (part)	03/16/20	J		
260.					Sold	03/20/20	L		
261. - Wisdom Tree Floating Rate Treasury Fund (USFR)	A	Dividend			Buy (add'l)	02/25/20	J		
262.					Sold (part)	03/16/20	J		
263.					Sold	03/23/20	K		
264. - iShares MSCI USA Min Volatility ETF (USMV)	B	Dividend	K	T	Buy	05/05/20	K		
265.					Sold (part)	07/27/20	J	A	
266.					Sold (part)	11/05/20	J	B	
267.					Sold (part)	12/14/20	J	A	
268. - Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	K	T	Sold (part)	01/10/20	J	A	
269.					Buy (add'l)	03/16/20	J		
270.					Buy (add'l)	03/23/20	J		
271.					Sold (part)	04/07/20	J	A	
272.					Sold (part)	07/27/20	J	B	

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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Scudder, Jr., Michael Y.

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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)	(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)
273.					Buy (add'l)	11/05/20	K		
274.					Sold (part)	12/14/20	J	A	
275. - Vanguard S&P 500 ETF (VOO)	A	Dividend			Buy	03/16/20	K		
276.					Sold (part)	04/07/20	J	A	
277.					Sold (part)	06/25/20	J	A	
278.					Sold (part)	07/27/20	J	A	
279.					Sold (part)	09/03/20	J	A	
280.					Sold	11/05/20	K	D	
281. - Vanguard Total Stock Market ETF (VTI)	A	Dividend			Sold (part)	01/10/20	J	B	
282.					Buy (add'l)	03/16/20	J		
283.					Buy (add'l)	03/23/20	J		
284.					Sold (part)	04/07/20	J	A	
285.					Sold (part)	05/05/20	J	A	
286.					Sold (part)	07/27/20	J	C	
287.					Sold (part)	09/03/20	J	B	
288.					Sold	11/05/20	K	E	
289. - Vanguard Value ETF (VTV)	B	Dividend	K	T	Sold (part)	01/10/20	J	A	

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

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)
290.					Buy (add'l)	02/25/20	J		
291.					Buy (add'l)	03/16/20	J		
292.					Buy (add'l)	03/23/20	J		
293.					Sold (part)	04/07/20	J		
294.					Sold (part)	07/27/20	J		
295.					Sold (part)	09/03/20	J	A	
296.					Sold (part)	11/05/20	K	C	
297.					Sold (part)	12/14/20	J	B	
298. - Vanguard Growth ETF (VUG)	A	Dividend	L	T	Sold (part)	01/10/20	J	C	
299.					Buy (add'l)	03/16/20	J		
300.					Sold (part)	04/07/20	J	A	
301.					Sold (part)	05/05/20	J	C	
302.					Sold (part)	06/25/20	J	B	
303.					Sold (part)	07/27/20	J	C	
304.					Sold (part)	07/31/20	J	C	
305.					Buy (add'l)	09/23/20	J		
306.					Buy (add'l)	11/05/20	K		

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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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)
307.					Sold (part)	12/14/20	J	D	
308. - Vanguard FTSE Emerging Market ETF (VWO)	A	Dividend			Buy	02/25/20	J		
309.					Buy (add'l)	03/16/20	J		
310.					Sold (part)	04/07/20	J		
311.					Sold	05/05/20	J		
312. - Wisdom Tree Emerging Markets Ex State- Owned ETF (XSOE)	A	Dividend	J	T	Buy	02/25/20	J		
313.					Buy (add'l)	03/16/20	J		
314.					Sold (part)	04/07/20	J		
315.					Sold (part)	06/25/20	J	A	
316.					Sold (part)	07/27/20	J	A	
317.					Sold (part)	12/14/20	J	A	
318. TD Ameritrade Investment Account #2 (H)									
319. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
320. - Invesco BulletShares 2020 ETF (BSCK)	A	Dividend			Sold	02/21/20	L	A	
321.					Buy	07/31/20	L		
322.					Sold	12/15/20	L		
323. - Invesco BulletShares 2021 ETF (BSCL)	A	Dividend	L	T	Sold	02/21/20	L	B	

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		

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Name of Person Reporting

Scudder, Jr., Michael Y.

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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)	(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)
324.					Buy	12/15/20	L		
325. - Wisdom Tree Emerging Markets Equity Income Fund (DEM)	A	Dividend			Sold	02/21/20	J		
326. - DoubleLine Flexible Income Fund I (DFLEX)	A	Dividend			Buy (add'l)	01/10/20	J		
327.					Sold (part)	03/17/20	J		
328.					Sold	04/07/20	K		
329. - Wisdom Tree International LargeCap Dividend Fund (DOL)	A	Dividend			Sold	02/21/20	K	A	
330. - iShares MSCI EAFE Growth ETF (EFG)	A	Dividend	J	T	Buy	05/05/20	J		
331.					Sold (part)	06/25/20	J	A	
332.					Sold (part)	07/27/20	J	A	
333.					Sold (part)	11/09/20	J	A	
334. - SPDR DoubleLine Emerging Mkts Debt ETF (EMTL)	A	Dividend	K	T	Buy	02/21/20	K		
335.					Sold (part)	03/17/20	J		
336.					Sold (part)	04/07/20	J		
337.					Sold (part)	07/27/20	J		
338. - SPDR Bloomberg Barclays Investment Grade Floating Rate ETF (FLRN)	A	Dividend			Sold	03/23/20	K		
339. - Federated Government Obligations Fund (GOSXX)	A	Dividend			Buy	03/24/20	M		
340.					Buy (add'l)	04/07/20	J		

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

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)
341.					Sold	05/05/20	M		
342. - iShares US Treasury Bond ETF (GOVT)	B	Dividend	K	T	Buy	02/21/20	L		
343.					Sold (part)	03/17/20	J	A	
344.					Sold (part)	03/20/20	J	A	
345.					Buy (add'l)	04/07/20	J		
346.					Buy (add'l)	06/25/20	J		
347.					Sold (part)	07/27/20	J	A	
348.					Buy (add'l)	09/23/20	K		
349.					Sold (part)	11/09/20	K		
350. - iShares Gold Trust ETF (IAU)		None	L	T	Sold (part)	03/17/20	J	A	
351.					Sold (part)	03/23/20	J	A	
352.					Buy (add'l)	09/23/20	J		
353.					Buy (add'l)	10/12/20	J		
354. - iShares Barclays US Treasury 7-10 YR ETF (IEF)	A	Dividend	K	T	Buy	07/31/20	L		
355.					Buy (add'l)	09/23/20	K		
356.					Sold (part)	11/09/20	K		
357. - Wisdom Tree International Quality Dividend Growth Fund (IQDG)	A	Dividend	J	T	Buy (add'l)	03/17/20	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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Name of Person Reporting

Scudder, Jr., Michael Y.

Date of Report

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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)	(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)
358.					Sold (part)	04/07/20	J		
359.					Sold (part)	06/25/20	J	A	
360.					Sold (part)	07/27/20	J	A	
361.					Sold (part)	07/31/20	J	A	
362.					Sold (part)	09/23/20	J	A	
363.					Sold (part)	11/09/20	J	A	
364. - JPMorgan Hedged Equity Fund (JHEQX)	A	Dividend	M	T	Buy	11/09/20	M		
365. - JPMorgan Ultra Short Income ETF (JPST)	B	Dividend	M	T	Buy	05/05/20	M		
366.					Buy (add'l)	06/25/20	J		
367.					Sold (part)	07/27/20	K	A	
368.					Buy (add'l)	09/23/20	L		
369.					Sold (part)	10/12/20	K		
370. - Lord Abbott Funds Ultra Short Bond Fund (LUBAX)	A	Dividend	M	T	Buy	06/25/20	M		
371. - iShares US Short Maturity Bond ETF (NEAR)	A	Dividend			Buy	02/21/20	M		
372.					Sold (part)	03/17/20	K		
373.					Sold (part)	03/20/20	K		
374.					Sold	03/23/20	L		

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

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Name of Person Reporting

Scudder, Jr., Michael Y.

Date of Report

05/12/2021

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)
375. - Federated Prime Cash Obligations Fund (PRCXX)	A	Dividend			Sold	02/21/20	M		
376.					Buy	05/05/20	M		
377.					Sold	06/25/20	M		
378. - iShares AAA-A Investment Grade Corp Bond ETF (QLTA)	B	Dividend	K	T	Buy	04/08/20	L		
379.					Sold (part)	07/07/20	J	A	
380.					Sold (part)	11/09/20	K	B	
381. - WisdomTree Trust US ESG Fund ETF (RESP)	A	Dividend			Sold	03/17/20	K		
382. - WisdomTree US Short-Term High Yield ETF (SFHY)	A	Dividend			Sold	02/21/20	L	A	
383. - iShares Short Treasury Bond ETF (SHV)	A	Dividend			Buy	03/20/20	L		
384.					Buy (add'l)	04/07/20	K		
385.					Sold	05/05/20	M		
386. - iShares Trust 0-5 YR High Yield Corporate Bond ETF (SHYG)	A	Dividend			Buy	02/21/20	L		
387.					Sold	04/06/20	K		
388. - SPDR Developed Work Ex-US ETF (SPDW)	A	Dividend			Buy (add'l)	03/17/20	J		
389.					Sold (part)	04/07/20	J		
390.					Sold	05/05/20	J		
391. - SPDR Total US Stock Market ETF (SPTM)	B	Dividend			Sold (part)	01/10/20	J	A	

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.)

☐ 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)
392.					Buy (add'l)	03/17/20	J		
393.					Sold (part)	04/07/20	J		
394.					Sold (part)	06/25/20	J	A	
395.					Sold (part)	07/27/20	K	B	
396.					Sold (part)	07/31/20	K	C	
397.					Sold (part)	09/03/20	J	A	
398.					Sold	09/23/20	L	D	
399. - SPDR S&P 500 High Div ETF (SPYD)	B	Dividend			Buy (add'l)	03/17/20	J		
400.					Buy (add'l)	03/23/20	J		
401.					Sold (part)	04/07/20	J		
402.					Sold (part)	05/05/20	K		
403.					Sold (part)	07/27/20	J		
404.					Sold	07/31/20	K		
405. - SPDR S&P 500 Growth ETF (SPYG)	A	Dividend	K	T	Sold (part)	01/10/20	J	A	
406.					Sold (part)	02/21/20	J	A	
407.					Buy (add'l)	03/17/20	J		
408.					Sold (part)	04/07/20	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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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)
409.					Sold (part)	05/05/20	J	A	
410.					Sold (part)	06/25/20	J	A	
411.					Sold (part)	07/27/20	K	C	
412.					Sold (part)	07/31/20	K	D	
413.					Sold (part)	09/03/20	J	A	
414.					Buy (add'l)	09/23/20	J		
415.					Buy (add'l)	10/12/20	J		
416.					Sold (part)	11/09/20	K	D	
417. - SPDR S&P 500 Value ETF (SPYV)	B	Dividend	K	T	Sold (part)	01/10/20	J	A	
418.					Buy (add'l)	03/17/20	J		
419.					Buy (add'l)	03/23/20	J		
420.					Sold (part)	04/07/20	J		
421.					Sold (part)	07/27/20	K		
422.					Sold (part)	07/31/20	K		
423.					Sold (part)	09/23/20	K		
424.					Sold (part)	11/09/20	J	A	
425. - T Rowe Price Ultra Short Bond Fund (TRBUX)	A	Dividend			Sold	01/10/20	J	A	

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	

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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)	(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)
426. - SPDR Ultra Short Term Bond ETF (ULST)	A	Dividend			Buy (add'l)	01/10/20	K		
427.					Sold (part)	03/17/20	K		
428.					Sold	03/20/20	L		
429. - WisdomTree Floating Rate Treasury EFT (USFR)	A	Dividend			Buy	02/21/20	K		
430.					Sold (part)	03/17/20	J		
431.					Sold	03/23/20	K		
432. - iShares MSCI US Min Vol ETF (USMV)	A	Dividend	K	T	Buy	05/05/20	K		
433.					Sold (part)	07/27/20	J	A	
434.					Sold (part)	09/23/20	J	A	
435.					Sold (part)	11/09/20	J	B	
436. - Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	K	T	Buy	10/12/20	K		
437. - Vanguard S&P 500 ETF (VOO)	A	Dividend			Buy	03/17/20	K		
438.					Sold (part)	04/07/20	J	A	
439.					Sold (part)	06/25/20	J	A	
440.					Sold (part)	07/27/20	J	B	
441.					Sold (part)	07/31/20	K	C	
442.					Sold (part)	09/03/20	J	A	

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	

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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)	(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)
443.					Sold	09/23/20	K	C	
444. - Vanguard Emerging Markets ETF (VWO)	A	Dividend			Buy	02/21/20	K		
445.					Buy (add'l)	03/17/20	J		
446.					Sold	05/05/20	K	A	
447. - WisdomTree Emerging Markets Ex-State Owned ETF (XSOE)	A	Dividend	J	T	Buy	02/21/20	K		
448.					Buy (add'l)	03/17/20	J		
449.					Sold (part)	06/25/20	J		
450.					Sold (part)	07/27/20	J	A	
451.					Sold (part)	09/23/20	J	A	
452.					Sold (part)	11/09/20	J	A	
453. TD Ameritrade Individual Retirement Account #1 (H)									
454. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
455. - DoubleLine Low Duration Bond Fund Class I (DBLSX)	A	Dividend			Buy (add'l)	02/26/20	J		
456.					Sold (part)	03/16/20	K		
457.					Sold	03/24/20	L		
458. - Wisdom Tree Emerging Markets Equity Income Fund (DEM)	A	Dividend			Sold	02/26/20	J		
459. - Wisdom Tree Emerging Markets Quality Dividend Growth Fund (DGRE)	A	Dividend			Sold	02/26/20	J	A	

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

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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)	(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)
460. - Wisdom Tree U.S. SmallCap Quality Dividend Growth Fund (DGRS)	A	Dividend			Sold	02/26/20	K		
461. - Wisdom Tree International LargeCap Dividend Fund (DOL)	A	Dividend			Sold	02/26/20	J		
462. - Wisdom Tree U.S.SmallCap Fund (EES)	A	Dividend			Sold	02/26/20	J		
463. - iShares MSCI EAFE Growth ETF (EFG)	A	Dividend	K	T	Buy	05/06/20	K		
464.					Sold (part)	07/17/20	J	A	
465. - SPDR DoubleLine Emerging Mkts Debt ETF (EMTL)	A	Dividend			Buy (add'l)	02/26/20	K		
466.					Sold (part)	03/16/20	J		
467.					Sold	04/07/20	K		
468. - Wisdom Tree U.S. Total Market Fund (EXT)	A	Dividend			Sold	02/26/20	K	B	
469. - Wisdom Tree U.S. Mid Cap Fund (EZM)	A	Dividend			Sold	02/26/20	K		
470. - VanEck Gold Miners ETF (GDX)	A	Dividend	K	T	Buy	07/17/20	K		
471.					Buy (add'l)	11/04/20	J		
472. - Federated Government Obligations Fund (GOSXX)	A	Dividend			Buy	03/24/20	K		
473.					Buy (add'l)	04/07/20	J		
474.					Sold	05/05/20	L		
475. - iShares US Treasury Bond ETF (GOVT)	A	Dividend	K	T	Buy	02/26/20	K		
476.					Sold (part)	03/16/20	J	A	

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

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)
477.					Buy (add'l)	04/07/20	J		
478.					Buy (add'l)	06/25/20	J		
479.					Buy (add'l)	09/03/20	J		
480. - iShares Gold Trust ETF (IAU)		None	L	T	Sold (part)	02/26/20	J	B	
481.					Sold (part)	03/16/20	J	A	
482.					Sold (part)	04/07/20	J	A	
483.					Buy (add'l)	07/17/20	K		
484. - Wisdom Tree International Quality Dividend Growth Fund (IQDG)	A	Dividend	K	T					
485. - JPMorgan Hedged Equity Fund (JHEQX)	A	Dividend	M	T	Buy	11/04/20	M		
486. - JPMorgan Ultra Short Income ETF (JPST)	A	Dividend	L	T	Buy	05/06/20	L		
487.					Buy (add'l)	06/25/20	J		
488.					Sold (part)	07/17/20	K	A	
489.					Buy (add'l)	09/03/20	J		
490. - Lord Abbett Developing Growth Fund (LADYX)	B	Dividend	K	T	Buy	07/17/20	J		
491. - iShares AAA-A Investment Grade Corp Bond ETF (QLTA)	A	Dividend			Buy	04/08/20	K		
492.					Buy (add'l)	06/25/20	J		
493.					Buy (add'l)	09/03/20	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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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)
494.					Sold	11/04/20	K	B	
495. - iShares Short Treasury Bond ETF (SHV)	A	Dividend			Buy	03/20/20	K		
496.					Buy (add'l)	03/24/20	J		
497.					Buy (add'l)	04/07/20	J		
498.					Sold	05/05/20	K		
499. - iShares Trust 0-5 YR High Yield Corp Bd ETF (SHYG)	A	Dividend			Buy	02/26/20	K		
500.					Sold (part)	03/16/20	J		
501.					Sold	04/06/20	K		
502. - SPDR Portfolio Emerging Markets ETF (SPEM)	A	Dividend			Buy (add'l)	02/26/20	J		
503.					Buy (add'l)	03/16/20	J		
504.					Sold	05/05/20	K		
505. - SPDR Portfolio Short Term Treasury ETF (SPTS)	A	Dividend			Sold	02/26/20	K	A	
506. - iShares MSCI US Min Vol ETF (USMV)	A	Dividend			Buy	05/06/20	K		
507.					Sold (part)	07/17/20	J	A	
508.					Sold	11/04/20	K	B	
509. - Vanguard Small-Cap Growth ETF (VBK)	A	Dividend	K	T	Buy (add'l)	03/16/20	J		
510.					Sold (part)	05/06/20	J		

1 Income Gain Codes: (See Columns B1 and D4)	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	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
2 Value Codes (See Columns C1 and D3)					
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value				

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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)
511.					Sold (part)	07/17/20	J	A	
512.					Buy (add'l)	11/04/20	J		
513. - Vanguard Small-Cap Value ETF (VBR)	A	Dividend	K	T	Buy (add'l)	02/26/20	J		
514.					Buy (add'l)	03/16/20	J		
515.					Buy (add'l)	11/04/20	J		
516. - Vanguard All-World ex-US ETF (VEU)	A	Dividend			Buy (add'l)	02/26/20	K		
517.					Buy (add'l)	03/16/20	J		
518.					Sold (part)	04/07/20	J		
519.					Sold	05/05/20	K		
520. - Vanguard Information Technology ETF (VGT)	A	Dividend			Buy	02/26/20	J		
521.					Buy (add'l)	03/16/20	J		
522.					Sold (part)	04/07/20	J		
523.					Sold (part)	06/25/20	J	A	
524.					Sold (part)	07/17/20	J	A	
525.					Sold (part)	09/03/20	J	A	
526.					Sold	11/04/20	J	C	
527. - Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	L	T	Buy	11/04/20	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	

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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)	(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)
528. - Vanguard Mid-Cap ETF (VO)	A	Dividend	K	T	Sold (part)	02/26/20	J	A	
529.					Buy (add'l)	03/16/20	J		
530.					Sold (part)	04/07/20	J		
531.					Sold (part)	07/17/20	J	A	
532. - Vanguard S&P 500 ETF (VOO)	A	Dividend			Buy	02/26/20	K		
533.					Buy (add'l)	03/16/20	J		
534.					Sold (part)	04/07/20	J		
535.					Sold (part)	07/17/20	K	A	
536.					Sold	11/04/20	K	C	
537. - Vanguard Total Stock Market ETF (VTI)	A	Dividend			Sold (part)	02/26/20	J	A	
538.					Buy (add'l)	03/16/20	J		
539.					Sold (part)	04/07/20	J		
540.					Sold (part)	06/25/20	J	A	
541.					Sold (part)	09/03/20	J	A	
542.					Sold	11/04/20	L	D	
543. - Vanguard Value ETF (VTV)	C	Dividend	L	T	Buy (add'l)	02/26/20	K		
544.					Buy (add'l)	03/20/20	J		

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		

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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)	(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)
545.					Sold (part)	04/07/20	J		
546.					Buy (add'l)	05/06/20	J		
547.					Sold (part)	11/04/20	L		
548. - Vanguard Growth ETF (VUG)	A	Dividend	M	T	Sold (part)	02/26/20	J	B	
549.					Buy (add'l)	03/16/20	J		
550.					Sold (part)	04/07/20	J	A	
551.					Sold (part)	05/06/20	J	A	
552.					Sold (part)	06/25/20	J	A	
553.					Sold (part)	09/03/20	J	B	
554.					Buy (add'l)	11/04/20	K		
555. - Wisdom Tree High Yield ETF (WFHY)	A	Dividend			Sold	02/26/20	K	A	
556. - Wisdom Tree Emerging Mkts Ex-State Owned ETF (XSOE)	A	Dividend	K	T	Buy	02/26/20	J		
557.					Buy (add'l)	03/16/20	J		
558.					Sold (part)	06/25/20	J	A	
559.					Sold (part)	11/04/20	J	A	
560. TD Ameritrade Individual Retirement Account #2 (H)									
561. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					

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	

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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)	(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)
562. - SPDR S&P Emerging Markets Small Cap ETF (EWX)	A	Dividend	J	T					
563. - SPDR S&P International Small Cap ETF (GWX)	A	Dividend			Sold	02/28/20	J		
564. - SPDR S&P 600 Small Cap Value ETF (SLYV)	A	Dividend	J	T	Buy (add'l)	02/28/20	J		
565. - SPDR Portfolio Developed World ex-U.S. ETF (SPDW)	A	Dividend	J	T	Sold (part)	02/28/20	J		
566. - SPDR Portfolio Emerging Markets ETF (SPEM)	A	Dividend	J	T	Buy (add'l)	02/28/20	J		
567. - SPDR Portfolio Large Cap ETF (SPLG)	A	Dividend	K	T	Buy (add'l)	02/28/20	J		
568. - SPDR Portfolio Small Cap ETF (SPSM)	A	Dividend	K	T	Buy (add'l)	02/28/20	J		
569. - SPDR Portfolio S&P 500 High Dividend ETF (SPYD)	A	Dividend			Sold	02/28/20	J		
570. - SPDR Portfolio S&P 500 Growth ETF (SPYG)	A	Dividend	K	T	Sold (part)	02/28/20	J	A	
571. - SPDR Portfolio S&P 500 Value ETF (SPYV)	A	Dividend	K	T	Buy (add'l)	02/28/20	J		
572. - SPDR Technology Select ETF (XLK)	A	Dividend	J	T	Buy	03/02/20	J		
573. TD Ameritrade Individual Retirement Account #3 (H)									
574. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
575. - Vanguard Total Bond Market ETF (BND)	A	Dividend	J	T	Sold (part)	02/28/20	J	A	
576. - Vanguard Small-Cap Index Fund ETF (VB)	A	Dividend	J	T	Buy (add'l)	02/28/20	J		
577.					Buy (add'l)	03/25/20	J		
578. - Vanguard Short-Term Corporate Bond (VCSH)	A	Dividend	J	T	Sold (part)	02/28/20	J	A	

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	
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	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)
579. - Vanguard FTSE Developed Markets ETF (VEA)	A	Dividend	J	T	Buy (add'l)	02/28/20	J		
580.					Buy (add'l)	03/25/20	J		
581. - Vanguard Short-Term Treasury Index Fund ETF Shares (VGSH)	A	Dividend	J	T	Sold (part)	02/28/20	J	A	
582.					Sold (part)	03/25/20	J	A	
583. - Vanguard Dividend Appreciation ETF (VIG)	A	Dividend	J	T					
584. - Vanguard Total Stock Market ETF (VTI)	A	Dividend	J	T	Buy (add'l)	02/28/20	J		
585. - Vanguard Value ETF (VTV)	A	Dividend	J	T	Buy (add'l)	02/28/20	J		
586. - Vanguard Growth ETF (VUG)	A	Dividend	J	T	Sold (part)	02/28/20	J	A	
587. - Vanguard FTSE Emerging Markets ETF (VWO)	A	Dividend	J	T	Buy (add'l)	02/28/20	J		
588. TD Ameritrade Investment Account #3 (H)									
589. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
590. - iShares Trust Growth Allocation ETF (AOR)	A	Dividend	J	T	Buy	02/05/20	J		
591. - Federated Prime Cash Obligations Fund (PRCXX)	A	Dividend	J	T	Buy (add'l)	02/05/20	J		
592. - Wisdom Tree Balance Income ETF (WBAL)	A	Dividend			Sold	01/27/20	J	A	
593. TD Ameritrade Investment Account #4 (H)									
594. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
595. - iShares Trust Growth Allocation ETF (AOR)	A	Dividend	J	T	Buy	02/05/20	J		

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
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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)
596. - Federated Prime Cash Obligations Fund (PRCXX)	A	Dividend	J	T	Buy (add'l)	02/05/20	J		
597. - Wisdom Tree Balance Income ETF (WBAL)	A	Dividend			Sold	01/27/20	J	A	
598. TD Ameritrade Investment Account #5 (H)									
599. - TD Ameritrade FDIC Insured Deposit Account (cash account) (MMDA12)	A	Interest	J	T					
600. - iShares Trust Growth Allocation ETF (AOR)	A	Dividend	J	T	Buy	02/05/20	J		
601. - Federated Prime Cash Obligations Fund (PRCXX)	A	Dividend	J	T	Buy (add'l)	02/05/20	J		
602. - Wisdom Tree Balance Income ETF (WBAL)	A	Dividend			Sold	01/27/20	J	A	
603. Illinois Bright Directions 529 Account (H)									
604. Invesco Government Agency Portfolio		None	K	T					
605. Bright Directions Age-Based Allocation		None	L	T					
606. West Virginia Smart Select 529 Account #1 (H) (see Part VIII)									
607. - All Equity Portfolio D		None	K	T					
608. West Virginia Smart Select 529 Account #2 (H) (see Part VIII)									
609. - All Equity Portfolio D		None	K	T					
610. Farmland - LaGrange County, Indiana		None	M	W					
611. REC RT, L.L.C. 125 12.5% Preferred Units (REIT)	A	Dividend	J	U					

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

In Part VII, I have disclosed two accounts in the West Virginia Smart Select 529 Plan. In both accounts, the principal is invested in an all equity portfolio. The Plan's fund manager is the Hartford Life Insurance Company. Beyond choosing an all equity portfolio concentration, I do not make or receive information about individual investment decisions within the accounts. The investment statements I receive show only the aggregate market value of the accounts at reporting dates, not specific equity holdings that the Plan chose to invest in.

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IX. CERTIFICATION.

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

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

Signature: s/ **Michael Y. Scudder, Jr.**

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

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544