

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) Motz, John F.	2. Court or Organization United States District Court for the District of Maryland	3. Date of Report 05/07/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Senior status	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final	6. Reporting Period 01/01/2020 to 12/31/2020
	5b. ☐ Amended Report	
7. Chambers or Office Address U.S. Courthouse 101 West Lombard St., 5th Fl. Baltimore, Maryland 21201		
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. Custodian	College Savings Plans for grandsons
2. Trustee	Generation Skipping Trust for Children (GST)
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.	

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Motz, John F.

Date of Report

05/07/2021

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

A. Filer's Non-Investment Income



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

DATE

SOURCE AND TYPE

INCOME
(yours, not spouse's)

1.		
2.		
3.		
4.		

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

(Dollar amount not required except for honoraria.)



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

DATE

SOURCE AND TYPE

1.		
2.		
3.		
4.		

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

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



NONE *(No reportable reimbursements.)*

SOURCE

DATES

LOCATION

PURPOSE

ITEMS PAID OR PROVIDED

1.				
2.				
3.				
4.				
5.				

Name of Person Reporting	Date of Report
Motz, John F.	05/07/2021

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

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05/07/2021

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)
1. Altria Group Inc (MO)	B	Dividend	K	T					
2. Apple Inc (AAPL)	D	Dividend	P1	T					
3. AT&T (T)	C	Dividend	L	T					
4. Campbell Soup Co (CPB)	A	Dividend	J	U					
5. Chevron Corp (CVX)	B	Dividend	K	T					
6. CVS Corp (CVS)	B	Dividend	K	T					
7. DoubleLine Total Return Bond Fund (DBLTX) (IRA)	A	Int./Div.	L	T	Buy	10/16/20	M		
8. Duke Realty Corp (DRE)	B	Dividend	K	T					
9. Exxon Mobil Corporation (XOM)	D	Dividend	L	T					
10. DFA T A World Ex US Core Equity (DFTWX)	A	Dividend			Sold	06/11/20	L	D	
11. Fidelity 500 Index Fund Intl Premium (FXAIX)	D	Int./Div.	O	T	Sold (part)	06/03/20	K	D	
12. Fidelity Conservative Income Muni Bond (FMNDX)	A	Int./Div.	L	T	Sold (part)	03/17/20	K		
13.					Sold	03/19/20	K		
14. Fidelity Emerging Markets Index (FPADX)		Int./Div.			Sold	04/03/20	K		
15. Fidelity Extended Market Index Instl Premium (FSMAX)	B	Int./Div.	L	T	Sold (part)	01/28/20	K		
16. Fidelity Inflation Protected Bd Index Instl Premium (FIPDX) (IRA)	B	Int./Div.	M	T	Sold (part)	08/12/20	J		
17. Fidelity Md Municipal Income (SMDMX)	C	Int./Div.	M	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	

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. Fidelity Tax Free Bond (FTABX)	B	Int./Div.	L	T	Buy	01/28/20	K		
19.					Sold	05/04/20	L		
20. Fidelity Treasury Fund (FZFXX)	A	Int./Div.	M	T					
21. General Electric Company (GE)	A	Dividend	J	T					
22. International Business Machines (IBM)	D	Dividend	M	T					
23. Invesco National AMT-Free Municipal Bond (PZA)	B	Int./Div.	L	T					
24. Invesco S&P 500 Equal Weight (RSP)	C	Int./Div.	M	T					
25. Invesco Taxable Municipal Bond (BAB) (IRA)	A	Int./Div.	L	T	Buy	08/12/20	K		
26.					Buy (add'l)	11/23/20	K		
27. Invesco Variable Rate Investment Grade (VRIG) (IRA)	B	Int./Div.	L	T	Sold (part)	10/16/20	L		
28.					Sold (part)	11/23/20	J		
29. iShares Core MSCI Emerging Markets (IEMG)	B	Int./Div.	K	T	Buy (add'l)	04/03/20	K		
30.					Sold (part)	06/15/20	K	C	
31. iShares Core S&P 500 (IVV) (IRA)	D	Int./Div.	O	T					
32. iShares Core S&P Small-Cap (IJR)	B	Int./Div.	M	T					
33. iShares MBS ETF (MBB) (IRA)	B	Int./Div.	M	T	Buy	12/11/19	M		
34. iShares MSCI EAFE Small Cap Index (SCZ)	A	Int./Div.			Sold	06/15/20	K	D	

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. iShares MSCI Emerging Mkts Minimum Volatility Index (EEMV)	A	Int./Div.			Sold	03/16/20	M		
36. iShares Russell 1000 ETF (IWB)	D	Int./Div.	O	T					
37. iShares Russell 2000 ETF (IWM)	A	Int./Div.	L	T					
38. iShares S&P 100 (OEF)	C	Int./Div.	M	T					
39. iShares S&P 500 Value (IVE)	C	Int./Div.	K	T	Sold (part)	06/11/20	M	E	
40.					Sold (part)	06/15/20	L	E	
41.					Sold (part)	08/12/20	K	D	
42. iShares S&P Small-Cap 600 Value (IJS)	B	Int./Div.	M	T					
43. JPMorgan Ultra-Short Income ETF (JPST) (IRA)	A	Int./Div.	L	T	Sold (part)	03/13/20	K		
44.					Sold	04/03/20	K		
45. Kraft Heinz Company (KHC)	A	Dividend	J	T					
46. Merck & Co Inc (MRK)	B	Dividend	K	T					
47. Mondelez Intl Inc (MDLZ)	A	Dividend	K	T					
48. Nuveen MD Quality Mun Income Fd (NMY)	C	Int./Div.	M	T	Sold (part)	12/17/20	J	B	
49.					Sold (part)	12/28/20	J	A	
50. Nuveen Select Tax-Free Income (NXQ)	C	Int./Div.	M	T					
51. Olin Corp (OLN)	A	Dividend	J	T					

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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	
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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52. Pepsico Incorporated (PEP)	C	Dividend	M	T					
53. Philip Morris International Inc. (PM)	B	Dividend	K	T					
54. PIMCO Income Instl (PIMIX) (IRA)	C	Int./Div.	L	T					
55. Schwab International Equity (SCHF)	C	Int./Div.	M	T	Buy	03/16/20	M		
56. SPDR S&P 500 Trust (SPY)	C	Int./Div.	N	T					
57. Stanley Black & Decker Inc (SWK)	B	Dividend	M	T					
58. Stone Ridge Reinsurance Risk Premium (SRRIX) (IRA)	B	Int./Div.	K	T	Sold (part)	02/28/20	L		
59.					Sold (part)	05/29/20	J		
60. T Rowe Price MD Tax Free Bond (MDXBX)	D	Int./Div.	N	T	Sold (part)	06/11/20	M		
61.					Sold (part)	06/15/20	K		
62. T Rowe Price Value (TRVLX)	B	Int./Div.	M	T					
63. T Rowe Price Group Inc (TROW)	D	Dividend	N	T					
64. Union Pacific Corp (UNP)	D	Dividend	N	T					
65. Vanguard FTSE Developed Markets (VEA)		Int./Div.			Sold	03/16/20	M		
66. Vanguard FTSE Emerging Markets (VWO)	C	Int./Div.	M	T	Buy	03/16/20	M		
67. Vanguard GNMA Admiral (VFIJX) (IRA)	C	Int./Div.	M	T	Buy (add'l)	06/03/20	L		
68. Vanguard High-Yield Corporate (VWEAX) (IRA)	A	Int./Div.			Buy	04/03/20	L		

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

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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)
69.					Sold	06/03/20	L		
70. Vanguard High-Yield Tax-Exempt Admiral (VWALX)	C	Int./Div.	M	T					
71. Vanguard Large Cap (VV)	B	Int./Div.	M	T					
72. Vanguard Long-Term Tax Exempt (VWLUX)	A	Int./Div.		T	Buy	05/04/20	L		
73.					Sold	06/11/20	L		
74. Wabtec Corporation (WAB)	A	Dividend	J	T					
75. Washington Real Estate (WRE)	C	Dividend	L	T					
76. Yum China Holdings Inc (YUMC)	A	Dividend	K	T					
77. Yum! Brands Inc (YUM)	B	Dividend	L	T					
78. 529 - Bond & Income Portfolio (CUST)	A	Int./Div.	L	T					
79. 529 - Global Equity Mkt Index Port (CUST)	A	Int./Div.	M	T	Buy (add'l)	06/03/20	L		
80. 529 - Vanguard Interest Accumulation Portfolio (CUST)	A	Int./Div.	L	T	Buy (add'l)	02/14/20	J		
81.					Buy (add'l)	09/02/20	J		
82.					Buy (add'l)	12/31/20	J		
83. 529 - Vanguard Total Bond Market Index Port (CUST)	A	Int./Div.	M	T	Buy (add'l)	02/14/20	J		
84.					Buy (add'l)	09/02/20	J		
85.					Sold (part)	12/31/20	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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86. 529 - Vanguard Total International Stock Index Port (CUST)	A	Int./Div.	L	T	Buy (add'l)	02/14/20	J		
87.					Sold (part)	09/02/20	J		
88.					Sold (part)	12/31/20	J		
89. 529 - Vanguard Total Stock Market Index Portfolio (CUST)	A	Int./Div.	M	T	Sold (part)	02/14/20	J		
90.					Sold (part)	09/02/20	J		
91.					Sold (part)	12/31/20	J		
92. 529 - Equity Index 500 Portfolio	A	Int./Div.	L	T	Sold (part)	06/03/20	L		
93.					Sold (part)	09/03/20	J		
94. 529 - US Bond enhanced Index Portfolio (CUST)	A	Int./Div.	M	T	Buy (add'l)	09/03/20	J		
95. -TRP Blue Chip Growth (TRBCX) (GST)	D	Int./Div.	N	T					
96. - TRP Int Bond (RPIBX) (GST)	A	Int./Div.	K	T					
97. - TRP Int Stock (PRITX) (GST)	B	Int./Div.	K	T					
98. - TRP Equity Income (PRFDX) (GST)	D	Int./Div.	M	T					
99. - TRP Global Stock (PRGSX) (GST)	D	Int./Div.	N	T					
100. - TRP Growth Stock (PRGFX) (GST)	D	Int./Div.	N	T					
101. - TRP New Era (PRNEX) (GST)	A	Int./Div.	K	T					
102. - TRP Government Money (PRRXX) (GST)	A	Int./Div.	M	T					

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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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103. - TRP Spectrum Growth (PRSGX) (GST)	E	Int./Div.	M	T					

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
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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
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M =\$100,001 - \$250,000
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T =Cash Market

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

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting	Date of Report
Motz, John F.	05/07/2021

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

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Motz, John F.

Date of Report

05/07/2021

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/ **John F. Motz**

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