

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) Chuang, Theodore D.	2. Court or Organization United States District Court, District of Maryland	3. Date of Report 05/15/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) United States District 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 United States Courthouse 6500 Cherrywood Lane Greenbelt, MD 20770		
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.)

POSITION

NAME OF ORGANIZATION/ENTITY

1. Advisor	Asian Pacific American Bar Association of Maryland
2.	
3.	
4.	
5.	

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

☒ NONE (No reportable agreements.)

DATE

PARTIES AND TERMS

1.	
2.	
3.	

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III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions)***A. Filer's Non-Investment Income**NONE *(No reportable non-investment income.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (yours, not spouse's)
1.		
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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>
1. 2020	National Immigration Forum - salary
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. Harvard Law School	January 13-14, 2020	Cambridge, MA	Speaker at a Law School Class	Transportation, meals, lodging
2.				
3.				
4.				
5.				

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

☒ NONE (No reportable gifts.)

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

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

☐ NONE (No reportable liabilities.)

CREDITOR	DESCRIPTION	VALUE CODE
1. Cenlar	Mortgage on rental property, Brookline, MA	M
2.		
3.		
4.		
5.		

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

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

A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(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. Rental Property, Brookline, MA	E	Rent	O	W					
2. Citibank Cash Accounts	A	Interest	O	T					
3. Emigrant Direct Cash Account	A	Interest	K	T					
4. Fidelity Dividend Growth Fund	B	Dividend	L	T					
5. Lord Abbett Affiliated A Fund	D	Dividend	N	T					
6. Brokerage Account #1 (H)									
7. - BNY Mellon International Stock Index Fund	A	Dividend	K	T					
8. - BNY Mellon Mid Cap Index Fund	D	Dividend	L	T					
9. - Janus Henderson Global Research Fund	B	Dividend	L	T					
10. - Janus Henderson Growth & Income Fund	B	Dividend	K	T					
11. - Loomis Sayles Bond Fund	B	Dividend	K	T					
12. - Oakmark Fund	A	Dividend	M	T					
13. - Schwab S&P 500 Fund	B	Dividend	L	T					
14. - Schwab Small Cap Index Fund	B	Dividend	L	T					
15. Brokerage Account #2 (H)									
16. - Schwab Bank	A	Int./Div.	J	T					
17. - Schwab 1000 Fund	C	Dividend	L	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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18. - Schwab Core Equity Fund	B	Dividend	K	T					
19. Brokerage Account #3 (H)									
20. - Morgan Stanley Bank (X)	A	Interest	J	T					
21. - Cisco Systems stock	A	Dividend	J	T					
22. - Invesco Diversified Dividend A	B	Dividend	K	T					
23. - Microsoft Corporation stock	A	Dividend	K	T					
24. - Invesco QQQ Trust (QQQ)	A	Dividend	K	T					
25. IRA #1 (H)									
26. - Janus Henderson Growth & Income Fund	A	Dividend	K	T					
27. - Oakmark Fund	A	Dividend	K	T					
28. - Schwab 1000 Fund	B	Dividend	K	T					
29. IRA #2 (H)									
30. - Schwab Bank	A	Int./Div.	J	T					
31. - Columbia Global Equity (formerly Energy & Natural Resources Fund)	A	Dividend	J	T					
32. - Oakmark Fund	A	Dividend	K	T					
33. - Schwab 1000 Fund	B	Dividend	K	T					
34. - Schwab Small Cap Index Fund	A	Dividend	K	T					

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(See Columns B1 and D4)	F =\$50,001 - \$100,000	G =\$100,001 - \$1,000,000	H1 =\$1,000,001 - \$5,000,000	H2 =More than \$5,000,000	
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		
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(See Column C2)	U =Book Value	V =Other	W =Estimated		

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35. - Invesco QQQ Trust (QQQ)	A	Dividend	K	T	Buy	03/13/20	J		
36. IRA #3 (H)									
37. -Fidelity Freedom 2030	D	Dividend	M	T					
38. Fidelity Cash Reserves	A	Int./Div.	J	T					
39. IRA #3.5 (H)									
40. Fidelity Freedom 2030	C	Dividend	L	T					
41. IRA#4 (H)									
42. -Fidelity Freedom 2030	B	Dividend	K	T					
43. -Fidelity Freedom 2035	C	Dividend	K	T					
44. IRA#5 (H)									
45. - Vanguard Life Strategy Growth Fund	C	Dividend	M	T					
46. My 529 Age Based Aggressive Global	C	Dividend	M	T	Sold (part)	01/06/20	K	E	
47.					Sold (part)	08/13/20	K	E	
48. Maryland College Investment Plan Portfolio 2024		None	N	T					
49. Northwestern Mutual Whole Life Insurance Policy	A	Dividend	K	T					
50. U.S. Govt. Securities Series EE Bonds		None	L	T					
51. 401(k) #1 (H)									

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52. John Hancock Multimanager 2035 Lifetime		None	M	T	Buy (add'l)	01/29/20	J		
53.					Buy (add'l)	02/25/20	J		
54.					Buy (add'l)	03/30/20	J		
55.					Buy (add'l)	04/28/20	J		
56.					Buy (add'l)	05/28/20	J		
57.					Buy (add'l)	06/29/20	J		
58.					Buy (add'l)	07/29/20	J		
59.					Buy (add'l)	08/27/20	J		
60.					Buy (add'l)	09/29/20	J		
61.					Buy (add'l)	10/26/20	J		
62.					Buy (add'l)	11/24/20	J		
63.					Buy (add'l)	12/28/20	J		
64. IRA#6 (H)									
65. Schwab Bank	A	Interest	M	T					
66. Agilent Technologies	A	Dividend	J	T					
67. Comcast Corporation	A	Dividend			Sold	01/15/20	J	A	
68. Ford Motor Co.	A	Dividend	J	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
F =\$50,001 - \$100,000
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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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69. General Electric Co.	A	Dividend	J	T					
70. Keysight Tech, Inc.	A	Dividend	J	T					
71. Microsoft Corp.	A	Dividend	K	T	Buy (add'l)	04/09/20	J		
72. Oracle Corp.	A	Dividend	J	T					
73. Walt Disney Co.	A	Dividend	K	T					
74. Aberdeen Int'l Equity Fund	A	Dividend	J	T					
75. Federated Kaufmann Fund	C	Dividend	L	T					
76. Schwab S&P 500 Index Fund	A	Dividend	K	T					
77. Schwab Small Cap Index Fund	A	Dividend	J	T					
78. IRA #7 (H) (now combined into IRA #6)									
79. Healthcare Select Sector SPDR Fund (XLV)	A	Dividend	J	T	Sold (part)	03/18/20	J	A	
80. Cons Discret Select Sector SPDR Fund (XLY)	A	Dividend	J	T	Buy (add'l)	04/09/20	J		
81. The Financial Select Sector SPDR Fund (XLF)	A	Dividend	J	T					
82. The Technology Select Sector SPDR Fund (XLK)	A	Dividend	J	T	Buy (add'l)	04/09/20	J		
83. Invesco QQQ TR (QQQ)	A	Dividend	K	T	Buy (add'l)	03/13/20	J		
84.					Buy (add'l)	04/09/20	J		
85.					Buy (add'l)	04/17/20	J		

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86. SPDR S&P 500 ETF Trust (SPY)	A	Dividend	J	T	Buy (add'l)	04/17/20	J		
87. Wells Fargo & Co New (WFC)	A	Dividend	J	T					
88. IShares MSCI Emerging Mkts ETF (EEM)	A	Dividend			Sold	03/16/20	J		
89. SPDR S&P Dividend Fund (SDY)	A	Dividend	J	T	Sold (part)	03/16/20	J		
90.					Sold (part)	03/18/20	J		
91. SPDR S&P Regional Banking ETF (KRE)	A	Dividend			Sold	02/28/20	J		
92. IShares MSCI China ETF (MCHI)	A	Dividend			Sold (part)	03/12/20	J		
93.					Sold (part)	03/16/20	J		
94.					Buy (add'l)	04/17/20	J		
95.					Sold	07/31/20	J		
96. IShares US Aerospace & Def ETF (ITA)	A	Dividend	J	T					
97. First Trust DJ Internet (FDN) (X)		None	J	T	Buy	04/17/20	J		
98. First Trust Value (FVD) (X)	A	Dividend	J	T	Buy	04/09/20	J		
99. Alibaba Group HLDG Ltd. common stock (BABA)	A	Dividend			Sold	07/29/20	K	C	
100. Amgen, Inc. common stock (AMGN)	B	Dividend	L	T	Sold (part)	04/16/20	J		
101. Apple, Inc. common stock (AAPL)	A	Dividend	K	T					
102. Applied Materials, Inc. common stock (AMAT)	A	Dividend	K	T					

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103. Cisco common stock (CSCO)	A	Dividend			Sold	02/27/20	J		
104. Johnson & Johnson common stock (JNJ)	A	Dividend	J	T	Buy	03/31/20	J		
105. Cons Staples Sel Sect SPDR Fund (XLP)	A	Dividend	J	T					
106. IShares MSCI Brazil ETF (EWZ)	A	Dividend			Sold	02/27/20	J		
107. Comm Serv Select Sector SPDR (XLC)	A	Dividend	J	T					
108. Utilities Sel Sect SPDR Fund (XLU)	A	Dividend	J	T					
109. Lord Abbett Ultra Short Bond Fund (LUBFX)	A	Dividend	J	T					
110. IShares MSCI India ETF (INDA)	A	Dividend			Sold	03/06/20	J		
111. Starbucks common stock (SBUX)	A	Dividend	J	T	Sold (part)	03/16/20	J		
112. Amazon common stock (AMZN)	A	Dividend			Sold	07/30/20	J	C	
113. Alphabet, Inc. Class A common stock (GOOGL)	A	Dividend	J	T	Buy (add'l)	04/09/20	J		
114.					Buy (add'l)	04/17/20	J		
115. Microsoft Corp common stock (MSFT)	A	Dividend	K	T	Buy (add'l)	04/09/20	J		
116. IShares Russell 2000 Growth ETF (IWO)	A	Dividend			Sold	03/10/20	J		
117. Industrial Sel Sec SPDR Fund (XLI)	A	Dividend	J	T					
118. IShares PHLX Semiconductor (SOXX)	A	Dividend	J	T					
119. IShares Russell Midcap G ETF (IWP)	A	Dividend			Sold	03/18/20	J		

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Name of Person Reporting

Chuang, Theodore D.

Date of Report

05/15/2021

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) 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)
120. SPDR S&P Homebuilders (XHB)	A	Dividend			Sold	03/16/20	J		
121. First Trust NYSE ARCA (FBT)	A	Dividend	J	T					
122. MasterCard, Inc. Class A common stock (MA)	A	Dividend	J	T					
123. SPDR Gold Tr Gold SHS (GLD)	A	Dividend	J	T	Buy (add'l)	03/09/20	J		
124.					Sold (part)	04/17/20	J	A	
125. iShares Silver Shares (SLV)	A	Dividend			Sold	03/16/20	J		
126. JPMorgan Chase common stock (JPM)	A	Dividend	J	T					
127. First Trust Rising Div Achiev (RDVY)	A	Dividend	J	T					
128. Verizon Communications common stock (X)	A	Dividend	J	T	Buy	04/09/20	J		
129. Guggenheim Limited Duration (GILHX) (X)	A	Dividend	J	T	Buy	03/10/20	J		
130. IRA#6A (H)									
131. CGM Mutual Fund (LOMMX) (X)	A	Dividend	J	T					
132. Brokerage Account #4J (H)									
133. Schwab Bank	A	Interest	L	T					
134. Invesco FTSE RAFI Dev Mkts (PDN)	A	Dividend			Sold (part)	02/28/20	J		
135.					Buy (add'l)	04/16/20	J		
136.					Sold	09/04/20	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	

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Chuang, Theodore D.

Date of Report

05/15/2021

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) 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)
137. Invesco FTSE FAFI (Emerging Mkts) (PXH)	A	Dividend			Sold (part)	02/28/20	J		
138.					Buy (add'l)	04/16/20	J		
139.					Sold	09/04/20	J	A	
140. Invesco FTSE RAFI US 1000 (PRF)	A	Dividend			Sold	03/12/20	J		
141. Invesco FTSE RAFI US 1500 (PRFZ)	A	Dividend			Sold (part)	02/28/20	J		
142.					Buy (add'l)	04/16/20	J		
143.					Sold (part)	06/29/20	J	A	
144.					Sold	09/04/20	J	B	
145. Invesco FTSE RAFI Dev Mkts Ex-US (PXF) (X)	A	Dividend			Buy	02/28/20	J		
146.					Sold (part)	04/23/20	J		
147.					Sold	09/04/20	J	A	
148. iShares Core MSCI (IEMG)	A	Dividend			Sold	03/12/20	J		
149. iShares Core US REIT (USRT)	A	Dividend			Sold	03/17/20	J		
150. iShares Gold ETF (IAU)	A	Dividend			Sold	09/04/20	J	A	
151. iShares Broad USD HG YLD (USHY)	A	Dividend			Buy	03/12/20	J		
152.					Sold	06/25/20	J	A	
153. Schwab Fundamental INL (FNDF)	A	Dividend			Sold (part)	02/28/20	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	

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Chuang, Theodore D.

Date of Report

05/15/2021

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)
154.					Buy (add'l)	04/23/20	J		
155.					Sold	09/04/20	J	A	
156. Schwab Fundamental Emerging Markets (FNDE) (X)	A	Dividend			Buy	02/28/20	J		
157.					Sold (part)	04/16/20	J		
158.					Buy (add'l)	06/25/20	J		
159.					Sold	09/04/20	J	A	
160. Schwab Fundamental Intl Smal Com (FNDC) (X)	A	Dividend			Buy	02/28/20	J		
161.					Sold	04/16/20	J		
162. Schwab Fundamental US Small Com (FNDA) (X)	A	Dividend			Buy	02/28/20	J		
163.					Sold	04/16/20	J		
164. Schwab Fundamental US Large (FNDX) (X)	A	Dividend			Buy	03/12/20	J		
165.					Sold (part)	06/25/20	J	A	
166.					Sold	09/04/20	J	B	
167. Schwab Intermediate Term (SCHR)	A	Dividend			Sold (part)	03/23/20	J	A	
168.					Sold	06/25/20	J	A	
169. Schwab International Small Cap (SCHC)	A	Dividend			Sold	03/12/20	J		
170. Schwab US Small Cap ETF (SCHA)	A	Dividend			Sold (part)	03/09/20	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)
171.					Buy (add'l)	04/23/20	J		
172.					Buy (add'l)	06/25/20	J		
173.					Sold	09/04/20	J	A	
174. Schwab US TIPS ETF (SCHP)	A	Dividend			Sold	09/04/20	J	A	
175. Schwab International Equity ETF (SCHF) (X)	A	Dividend			Buy	03/11/20	J		
176.					Sold	04/16/20	J		
177. Schwab Emerging Markets Equity (SCHE) (X)	A	Dividend			Buy	03/12/20	J		
178.					Buy (add'l)	06/25/20	J		
179.					Sold	09/04/20	J	A	
180. Schwab US REIT ETF (SCHH) (X)	A	Dividend			Buy	03/17/20	J		
181.					Sold	09/04/20	J	A	
182. Schwab US Large Cap ETF (SCHX) (X)	A	Dividend			Buy	03/23/20	J		
183.					Buy (add'l)	06/25/20	J		
184.					Sold	09/04/20	J	B	
185. Schwab US Tips ETF (SCHP) (X)	A	Dividend			Buy	06/25/20	J		
186.					Sold	09/04/20	J	A	
187. SPDR Bloomberg Barclays (EBND)	A	Dividend			Sold	03/23/20	J		

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

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

J =\$15,000 or less

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

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

Q =Appraisal

U =Book Value

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

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

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

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

R =Cost (Real Estate Only)

V =Other

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

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

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

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

P4 =More than \$50,000,000

S =Assessment

W =Estimated

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

H2 =More than \$5,000,000

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

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

T =Cash Market

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

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. Vanguard FTSE Developed (VEA)	A	Dividend			Sold (part)	03/11/20	J		
189.					Buy (add'l)	04/16/20	J		
190.					Sold	09/04/20	J	A	
191. Vanguard Mortgage Backed (VMBS)	A	Dividend			Sold (part)	06/25/20	J	A	
192.					Sold	09/04/20	J	A	
193. Vanguard S&P 500 ETF (VOO)	A	Dividend			Sold	03/23/20	J		
194. Vanguard Small Cap ETF (VB) (X)	A	Dividend			Buy	03/09/20	J		
195.					Sold (part)	04/23/20	J		
196.					Sold	09/04/20	J	A	
197. Vanguard FTSE All World Ex US (VSS) (X)	A	Dividend			Buy	03/12/20	J		
198.					Sold	09/04/20	J	A	
199. Vanguard Intermediate Term CO ETF IV (VCIT) (X)	A	Dividend			Buy	06/25/20	J		
200.					Sold	09/04/20	J	A	
201. XTrackers Inter Real Estate (HAUZ)	A	Dividend			Sold	09/04/20	J	A	
202. XTrackers USD High Yield (HYLB)	A	Dividend			Sold	03/12/20	J		
203. Brokerage Account #4C (H)									
204. Schwab Bank	A	Interest	J	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
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

Chuang, Theodore D.

Date of Report

05/15/2021

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) 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. Schwab US REIT (SCHH)	A	Dividend	J	T					
206. Schwab Emerging Markets (SCHE)	A	Dividend	J	T	Buy (add'l)	06/24/20	J		
207. Schwab Funda Emg Markets (FNDE)	A	Dividend	J	T	Buy (add'l)	06/24/20	J		
208. Schwab Fundamental INL Large (FNDF)	A	Dividend	J	T					
209. Schwab Fundamental INTL Small (FNDC)	A	Dividend	J	T					
210. Schwab Fundamental US Large (FNDX)	A	Dividend	J	T	Sold (part)	06/24/20	J		
211. Schwab Fundamental US Small (FNDA)	A	Dividend	J	T					
212. Schwab International (SCHF)	A	Dividend	J	T					
213. Schwab International Small Cap (SCHC)	A	Dividend	J	T					
214. Schwab US Large Cap EFT (SCHX)	A	Dividend	J	T					
215. Schwab US Small Cap ETF (SCHA)	A	Dividend	J	T					
216. Brokerage Account #4K (H)									
217. Schwab Bank (X)	A	Interest	L	T					
218. Schwab US REIT (SCHH) (X)	A	Dividend			Sold	09/04/20	J		
219. Schwab Emerging Markets (SCHE)	A	Dividend			Buy (add'l)	06/24/20	J		
220.					Sold	09/04/20	J	A	
221. Schwab Fundamental US Small (FNDA)	A	Dividend			Sold	09/04/20	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

Chuang, Theodore D.

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)
222. Schwab Funda Emg Markets (FNDE)	A	Dividend			Buy (add'l)	06/24/20	J		
223.					Sold	09/04/20	J		
224. Schwab Fundamental INL Large (FNDF)	A	Dividend			Sold	09/04/20	J		
225. Schwab Fundamental INTL Small (FNDC)	A	Dividend			Sold	09/04/20	J		
226. Schwab Fundamental US Large (FNDX)	A	Dividend			Buy (add'l)	03/16/20	J		
227.					Sold (part)	06/24/20	J		
228.					Sold	09/04/20	J	A	
229. Schwab Fundamental US Small (FNDA)	A	Dividend			Buy (add'l)	03/16/20	J		
230.					Sold	09/04/20	J		
231. Schwab International (SCHF)	A	Dividend			Buy (add'l)	03/16/20	J		
232.					Sold (part)	06/25/20	J		
233.					Sold	09/04/20	J	A	
234. Schwab International Small Cap (SCHC)	A	Dividend			Sold	09/04/20	J		
235. Schwab US Large Cap EFT (SCHX)	A	Dividend			Sold	09/04/20	J	B	
236. Schwab US Small Cap ETF (SCHA)	A	Dividend			Sold	09/04/20	J		
237. Vanguard Small Cap ETF IV: (VB)	A	Dividend			Sold	09/04/20	J	A	
238. Invesco FTSE RAFI (PXF) (X)	A	Dividend			Buy	03/16/20	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		

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)
239.					Sold (part)	06/24/20	J	A	
240.					Sold	09/04/20	J	A	

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	Date of Report
Chuang, Theodore D.	05/15/2021

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

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Name of Person Reporting

Chuang, Theodore D.

Date of Report

05/15/2021

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/ Theodore D. Chuang**

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

Committee on Financial Disclosure
Administrative Office of the United States Courts
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