

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) Morris, Edward L.	2. Court or Organization U.S. Bankruptcy Court, Northern District of Texas	3. Date of Report 11/13/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Bankruptcy Judge	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 Eldon B. Mahon U.S. Courthouse 501 W. 10th Street Room 206 Fort Worth, Texas 76102		
IMPORTANT NOTES: The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.		

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

☐ NONE (No reportable positions.)

<u>POSITION</u>	<u>NAME OF ORGANIZATION/ENTITY</u>
1. Member	Natash, LLC
2. Member	Exceder Mobile Park Fund 1, LLC
3. Executive Committee Member (non-voting)	John C. Ford American Inn of Court
4. Ex Officio Member	State Bar of Texas Bankruptcy Law Section, Young Lawyers Committee
5. Committee of the Annual Meeting Member	National Conference of Bankruptcy Judges
6. Next Generation Committee	National Conference of Bankruptcy Judges

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

Page 2 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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.)*

<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	Southern Initials LLC, self-employed embroidery business
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. The Center for American and International Law	February 5-7, 2020	New Orleans, LA	Fifth Circuit Bankruptcy Bench-Bar CLE (speaker)	Transportation, hotel, meals
2.				
3.				
4.				
5.				

Name of Person Reporting	Date of Report
Morris, Edward L.	11/13/2021

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. The University of Oklahoma	Tuition	None
2.		
3.		
4.		
5.		

FINANCIAL DISCLOSURE REPORT

Page 4 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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)
1. Investment Account #1 (H)									
2. - American New World Cl F3	A	Dividend			Sold (part)	02/03/20	J	A	
3.			L	T	Buy (add'l)	03/19/20	J		
4. - Blackrock National Municipal Cl K	B	Dividend			Sold (part)	02/03/20	J	A	
5.			L	T	Sold (part)	03/19/20	J		
6. - Edward Jones Money Market Fund: Investment Shares (JNSXX)	A	Dividend	J	T					
7. - Franklin Templeton Global Bond Cl R6	B	Dividend			Buy (add'l)	02/03/20	J		
8.					Sold (part)	03/19/20	J		
9.					Sold	10/20/20	K		
10. - Goldman Sachs Financial Square Government Cl 1	A	Dividend			Buy	01/27/20	J		
11.					Buy (add'l)	02/03/20	K		
12.			J		Sold (part)	03/19/20	J		
13. - Hartford Divident & Growth Cl F	B	Dividend		T	Buy	10/20/20	L		
14.			L	T	Buy (add'l)	12/11/20	J		
15. - Hartford World Bond Cl F	A	Dividend			Buy (add'l)	02/03/20	J		
16.					Sold (part)	03/19/20	J		
17.			L	T	Buy (add'l)	10/20/20	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)
18. - iShares Core Dividend Growth ETF	B	Dividend			Buy (add'l)	01/27/20	J		
19.					Sold (part)	02/03/20	J	B	
20.			L	T	Buy (add'l)	03/19/20	J		
21. - iShares Core S&P Mid Cap ETF	A	Dividend			Buy (add'l)	01/27/20	J		
22.					Sold (part)	02/03/20	J	A	
23.			L	T	Buy (add'l)	03/19/20	J		
24. - iShares Core S&P Small Cap ETF	A	Dividend			Buy (add'l)	01/27/20	J		
25.					Sold (part)	02/03/20	J		
26.			L	T	Buy (add'l)	03/19/20	J		
27. - iShares Edge MSCI USA Momentum Factor ETF		None			Sold	01/24/20	L	D	
28. - iShares Russell 1000 Growth Fund	A	Dividend			Buy	01/27/20	J		
29.					Buy (add'l)	02/03/20	K		
30.					Buy (add'l)	03/19/20	J		
31.					Sold	10/20/20	L	D	
32. - iShares Russell 1000 Value Fund	B	Dividend			Buy (add'l)	01/27/20	J		
33.					Sold (part)	02/03/20	J	A	
34.			L	T	Buy (add'l)	03/19/20	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

FINANCIAL DISCLOSURE REPORT

Page 6 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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)
35. - iShares Trust Core MSCI EAFE ETF	B	Dividend			Buy (add'l)	01/27/20	J		
36.					Sold (part)	02/03/20	J	A	
37.			L	T	Buy (add'l)	03/19/20	J		
38. - MFS International Diversification CI R6	B	Dividend			Buy (add'l)	02/03/20	J		
39.			L	T	Buy (add'l)	03/19/20	J		
40. - MFS Municipal Income CI R6	B	Dividend	L	T	Sold (part)	03/19/20	J	A	
41. - Spdr S&P 500 ETF Tr Unit Ser I S&P Depository	B	Dividend			Buy (add'l)	01/27/20	J		
42.					Sold (part)	02/03/20	K	D	
43.			M	T	Buy (add'l)	03/19/20	J		
44. - T. Rowe Price Blue Chip Growth CI 1	B	Dividend			Buy (add'l)	02/03/20	J		
45.			M	T	Buy (add'l)	03/19/20	J		
46. - Thornburg Limited Term Municipal CI 1	A	Dividend			Buy (add'l)	02/03/20	J		
47.			K	T	Sold (part)	03/19/20	J	A	
48. Investment Account #2 (H)									
49. - Edward Jones Money Market Fund: Investment Shares (JNSXX)	A	Dividend	J	T					
50. - Invesco Short Term Bond C	B	Dividend	L	T	Sold (part)	08/17/20	K	A	
51. IRA Account #1 (H)									

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

Page 7 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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)
52. - Artisan International Value Cl 1	B	Dividend	M	T	Buy	10/20/20	M		
53. - Blackrock Mid Cap Growth Equity Cl K		None			Sold	01/24/20	K		
54.					Buy	01/27/20	K		
55.			L	T	Buy (add'l)	03/19/20	J		
56. - Blackrock Total Return Cl K	C	Dividend			Sold	01/24/20	L		
57.					Buy	01/27/20	L		
58.			L	T	Sold (part)	03/19/20	K		
59. - Edward Jones Money Market Fund: Retirement Shares (JRSXX) (Y)									
60. - Franklin Dynatech Cl R6		None			Sold	01/24/20	M		
61.					Buy	01/27/20	M		
62.			M	T	Buy (add'l)	03/19/20	J		
63. - Goldman Sachs Financial Square Government Cl 1	A	Dividend			Buy	01/27/20	K		
64.					Sold (part)	03/13/20	J		
65.					Sold (part)	03/19/20	J		
66.					Sold (part)	06/11/20	J		
67.					Sold (part)	07/14/20	J		
68.					Sold (part)	08/12/20	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

Page 8 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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)
69.					Sold (part)	09/14/20	J		
70.					Sold (part)	11/12/20	J		
71.			J	T	Sold (part)	12/11/20	J		
72. - Hartford Equity Income Cl F	C	Dividend			Sold	01/24/20	M		
73.					Buy	01/27/20	M		
74.			M	T	Buy (add'l)	03/19/20	J		
75. - iShares Barclays 1-3 Year Treasury Bond Fund		None			Sold	01/24/20	L		
76. - iShares Core Dividend Growth ETF	C	Dividend			Buy	01/27/20	M		
77.			M	T	Buy (add'l)	03/19/20	J		
78. - iShares Trust Core 1-5 Year USD Bond Fund	B	Dividend			Buy	01/27/20	L		
79.			L	T	Sold (part)	03/19/20	J		
80. - John Hancock Bond Cl R6	C	Dividend			Sold	01/24/20	L		
81.					Buy	01/27/20	L		
82.			L	T	Sold (part)	03/19/20	J		
83. - John Hancock Disciplined Value Cl R6		None			Sold	01/24/20	M		
84. - John Hancock International Growth Cl R6	A	Dividend	L	T	Buy	10/20/20	L		
85. - MFS International Diversification Cl R6		None			Sold	01/24/20	M		

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)
86.					Buy	01/27/20	M		
87.					Sold (part)	10/13/20	J		
88.					Sold	10/20/20	M		
89. - T Rowe Price Blue Chip Growth Cl 1	B	Dividend			Sold	01/24/20	M		
90.					Buy	01/27/20	M		
91.			M	T	Buy (add'l)	03/19/20	J		
92. - T Rowe Price Qm US Small Cap Growth Equity Cl 1	B	Dividend			Sold	01/24/20	K		
93.					Buy	01/27/20	K		
94.			L	T	Buy (add'l)	03/19/20	J		
95. - T Rowe Price Short-Term Bond Cl 1	B	Dividend			Sold	01/24/20	L		
96.					Buy	01/27/20	L		
97.			L	T	Sold (part)	03/19/20	J		
98. - Tcw Core Fixed Income Cl 1	C	Dividend			Sold	01/24/20	L		
99.					Buy	01/27/20	M		
100.			L	T	Sold (part)	03/19/20	K		
101. - Victory Sycamore Established Value Cl R6	C	Dividend			Sold	01/24/20	K		
102.			L	T	Buy	01/27/20	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

FINANCIAL DISCLOSURE REPORT

Page 10 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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)
103. - Wisdomtree SMALLCAP Div ETF	B	Dividend			Sold	01/24/20	K		
104.					Buy	01/27/20	K		
105.			K	T	Buy (add'l)	03/19/20	J		
106. IRA Account #2 (H)									
107. - Baird Short-Term Bond Cl 1	A	Dividend	J	T					
108. - Edward Jones Money Market Fund: Retirement Shares (JRSXX) (Y)									
109. - Hartford International Opportunities Cl F	A	Dividend	J	T					
110. - iShares Core S&P Small Cap ETF	A	Dividend	J	T					
111. - iShares Core US Aggregate Bond ETF	A	Dividend	J	T					
112. - iShares S&P 500 Growth Fund	A	Dividend	J	T					
113. - Spdr Ser Tr S&P Divid ETF	A	Dividend	J	T					
114. - T Rowe Price US Treasury Money Cl 1	A	Dividend	J	T					
115. Teacher Retirement System of Texas	B	Interest	L	T					
116. Prudential Retirement Annuity #1 (H)									
117. - AST Goldman Sachs Small Cap Value		None			Sold (part)	03/18/20	J		
118.					Buy (add'l)	03/24/20	J		
119.					Buy (add'l)	03/26/20	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

Page 11 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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.			K	T	Buy (add'l)	05/06/20	J		
121. - AST Hotchkis & Wiley Large-Cap Value		None			Buy (add'l)	02/03/20	J		
122.					Sold (part)	03/18/20	J		
123.					Buy (add'l)	03/24/20	J		
124.			K	T	Buy (add'l)	05/04/20	J		
125. - AST International Growth		None			Sold (part)	03/18/20	J		
126.					Buy (add'l)	03/24/20	J		
127.					Buy (add'l)	03/26/20	J		
128.			K	T	Sold (part)	08/03/20	J		
129. - AST International Value		None			Sold (part)	03/18/20	J		
130.					Buy (add'l)	03/24/20	J		
131.					Buy (add'l)	03/26/20	J		
132.			K	T	Buy (add'l)	05/04/20	J		
133. - AST Investment Grade Bond		None			Buy	03/18/20	K		
134.					Sold (part)	03/24/20	K		
135.					Sold	03/26/20	K		
136. - AST Prudential Core Bond Portfolio		None			Sold (part)	03/18/20	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)
137.					Buy (add'l)	03/24/20	J		
138.					Buy (add'l)	03/26/20	J		
139.					Sold (part)	05/24/20	J		
140.			K	T	Buy (add'l)	08/03/20	J		
141. - AST Small Cap Growth		None			Sold (part)	03/18/20	J		
142.					Buy (add'l)	03/24/20	J		
143.					Buy (add'l)	03/26/20	J		
144.			K	T	Sold (part)	08/03/20	J		
145. - AST T Rowe Price Large Cap Growth		None			Sold (part)	02/03/20	J		
146.					Sold (part)	03/18/20	J		
147.					Buy (add'l)	03/24/20	J		
148.					Buy (add'l)	03/26/20	J		
149.					Sold (part)	05/04/20	J		
150.			K	T	Sold (part)	08/03/20	J		
151. - AST Western Asset Core Plus Bond		None			Sold (part)	03/18/20	J		
152.					Buy (add'l)	03/24/20	J		
153.					Buy (add'l)	03/26/20	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

FINANCIAL DISCLOSURE REPORT

Page 13 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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.					Sold (part)	05/04/20	J		
155.			K	T	Buy (add'l)	08/03/20	J		
156. Prudential Retirement Annuity #2 (H)									
157. - AST Black Rock/Loomis Sayles Bond		None	J	T					
158. - AST Global Bond Portfolio		None	J	T	Buy	11/13/20	J		
159. - AST Goldman Sachs Small Cap Value		None	J	T					
160. - AST International Growth		None	K	T					
161. - AST International Value		None	K	T					
162. - AST MFS Growth		None	L	T					
163. - AST Small Cap Growth		None	K	T					
164. - AST T Rowe Price Large Cap Growth		None	L	T					
165. - AST Templeton Global Bond		None			Sold	11/13/20	J		
166. - AST Western Asset Core Plus Bond		None	J	T					
167. 529 Plan #1 (H)									
168. - Franklin529 Growth & Inc A		None	K	T	Sold (part)	01/08/20	K	D	
169. 529 Plan #2 (H)									
170. - Franklin529 Grw (19+) A		None			Sold (part)	01/09/20	K	C	

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

Page 14 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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)
171.			J	T	Sold (part)	08/12/20	J	B	
172. Health Savings Account (H)									
173. - HSA Bank, a Division of Webster Bank, N.A.	A	Interest	K	T					
174. John Hancock Accumulation VUL #1 (H)									
175. - John Hancock Var. Ins. Trust: Blue Chip Growth Trust Fund		None			Buy (add'l)	05/11/20	J		
176.					Sold	05/17/20	K		
177.			K	T	Buy	05/17/20	K		
178. - John Hancock Var. Ins. Trust: Core Bond Trust Fund		None			Buy (add'l)	05/11/20	J		
179.					Sold	05/17/20	K		
180.			K	T	Buy	05/17/20	K		
181. - John Hancock Var. Ins. Trust: Disciplined Value Int'l Trust Fund		None			Buy (add'l)	05/11/20	J		
182.					Sold	05/17/20	K		
183.			K	T	Buy	05/17/20	K		
184. - John Hancock Var. Ins. Trust: Emerging Markets Value Trust Fund		None			Sold	05/17/20	J		
185.			J	T	Buy	05/17/20	J		
186. - John Hancock Var. Ins. Trust: Fundamental Large Cap Value Trust Fund		None			Buy (add'l)	05/11/20	J		
187.					Sold	05/17/20	K		

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.			K	T	Buy	05/17/20	K		
189. - John Hancock Var. Ins. Trust: Int'l Equity Index Trust Fund		None			Buy (add'l)	05/11/20	J		
190.					Sold	05/17/20	K		
191.			K	T	Buy	05/17/20	K		
192. - John Hancock Var. Ins. Trust: Investment Quality Bond Trust Fund		None			Buy (add'l)	05/11/20	J		
193.					Sold	05/17/20	K		
194.			K	T	Buy	05/17/20	K		
195. - John Hancock Var. Ins. Trust: Opportunistic Fixed Income Trust Fund		None			Buy (add'l)	05/11/20	J		
196.					Sold	05/17/20	K		
197.			K	T	Buy	05/17/20	K		
198. - John Hancock Var. Ins. Trust: Small Cap Stock Trust Fund		None			Buy (add'l)	05/11/20	J		
199.					Sold	05/17/20	J		
200.			K	T	Buy	05/17/20	J		
201. - John Hancock Var. Ins. Trust: Small Cap Value Trust Fund		None			Buy (add'l)	05/11/20	J		
202.					Sold	05/17/20	J		
203.			K	T	Buy	05/17/20	J		
204. John Hancock Accumulation VUL #2 (H)									

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

FINANCIAL DISCLOSURE REPORT

Page 16 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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)
205. - John Hancock Var. Ins. Trust: Disciplined Value Int'l Trust Fund		None			Sold	05/15/20	J		
206.			J	T	Buy	05/15/20	J		
207. - John Hancock Var. Ins. Trust: Equity Income Trust Fund		None			Sold	05/15/20	J		
208.			K	T	Buy	05/15/20	J		
209. - John Hancock Var. Ins. Trust: Fundamental Large Cap Value Trust Fund		None			Sold	05/15/20	J		
210.			K	T	Buy	05/15/20	J		
211. - John Hancock Var. Ins. Trust: Global Trust Fund		None			Sold	05/15/20	J		
212.			J		Buy	05/15/20	J		
213. - John Hancock Var. Ins. Trust: High Yield Trust Fund		None			Sold	05/15/20	J		
214.			J	T	Buy	05/15/20	J		
215. - John Hancock Var. Ins. Trust: Investment Quality Bond Trust Fund		None			Sold	05/15/20	J		
216.			J	T	Buy	05/15/20	J		
217. - John Hancock Var. Ins. Trust: Mid Cap Index Trust Fund		None			Sold	05/15/20	J		
218.			J	T	Buy	05/15/20	J		
219. - John Hancock Var. Ins. Trust: Opportunistic Fixed Income Trust Fund		None			Sold	05/15/20	J		
220.			J	T	Buy	05/15/20	J		
221. - John Hancock Var. Ins. Trust: Small Cap Opportunities Trust Fund		None			Sold	05/15/20	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)
222.			J	T	Buy	05/15/20	J		
223. - John Hancock Var. Ins. Trust: Small Cap Value Trust Fund		None			Sold	05/15/20	J		
224.			J	T	Buy	05/15/20	J		
225. Lincoln National LIC MoneyGuard II Policy #1		None	L	V					
226. Lincoln National LIC MoneyGuard II Policy #2		None	L	V					
227. JPMorgan Chase Bank Accounts (H)									
228. - Account #1	A	Interest	L	T					
229. - Account #2		None	J	T					
230. - Account #3		None	J	T					
231. - Account #4	A	Interest	J	T					
232. Natash, LLC		None	J	W					
233. Exceder Mobil Park Fund 1, LLC (Y)									
234. Southern Initials LLC	C	Distribution	J	U					

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

FINANCIAL DISCLOSURE REPORT

Page 18 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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

Part VII, lines 181, 205: fka John Hancock Var. Ins. Trust: Int'l Value Trust Fund

Part VII, line 195: fka John Hancock Var. Ins. Trust: Quality Bond Trust Fund

Part VII, line 219: fka John Hancock Var. Ins. Trust: Global Bond Trust Fund

Part VII, line 225: value utilized is "surrender value" of policy

Part VII, line 226: value utilized is "surrender value" of policy

FINANCIAL DISCLOSURE REPORT

Page 19 of 19

Name of Person Reporting

Morris, Edward L.

Date of Report

11/13/2021

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/ Edward L. Morris

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