

**FINANCIAL DISCLOSURE REPORT  
FOR CALENDAR YEAR 2015**

*Report Required by the Ethics  
in Government Act of 1978  
(5 U.S.C. app. §§ 13101-13111)*

|                                                                                                                                                                                            |                                                                                                                                                                                                                                        |                                                                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| <b>1. Person Reporting (last name, first, middle initial)</b><br><br>Jackson, Ketanji B.                                                                                                   | <b>2. Court or Organization</b><br><br>U.S. District Court for the District of Columbia                                                                                                                                                | <b>3. Date of Report</b><br><br>07/11/2023                       |
| <b>4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)</b><br><br>Active District Judge                                          | <b>5a. Report Type (check appropriate type)</b><br><br><input type="checkbox"/> Nomination <input type="checkbox"/> Date<br><input type="checkbox"/> Initial <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Final | <b>6. Reporting Period</b><br><br>01/01/2015<br>to<br>12/31/2015 |
|                                                                                                                                                                                            | <b>5b.</b> <input checked="" type="checkbox"/> Amended Report                                                                                                                                                                          |                                                                  |
| <b>7. Chambers or Office Address</b><br><br>U.S. District Court for the District of Columbia<br>333 Constitution Ave NW<br>Washington, D.C. 20001                                          |                                                                                                                                                                                                                                        |                                                                  |
| <b>IMPORTANT NOTES:</b> <i>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> |                                                                                                                                                                                                                                        |                                                                  |

**I. POSITIONS.** *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☐ NONE *(No reportable positions.)*

POSITION

NAME OF ORGANIZATION/ENTITY

- |                       |                                                        |
|-----------------------|--------------------------------------------------------|
| 1. Board of Directors | Council for Court Excellence                           |
| 2. Board of Directors | Historical Society of the District of Columbia Circuit |
| 3.                    |                                                        |
| 4.                    |                                                        |
| 5.                    |                                                        |

**II. AGREEMENTS.** *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements )*

☒ NONE *(No reportable agreements.)*

DATE

PARTIES AND TERMS

- |    |  |
|----|--|
| 1. |  |
| 2. |  |
| 3. |  |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Jackson, Ketanji B.

Date of Report

07/11/2023

## III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

### A. Filer's Non-Investment Income



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

| <u>DATE</u> | <u>SOURCE AND TYPE</u> | <u>INCOME</u><br>(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</u>                       |
|-------------|-------------------------------------|
| 1. 2015     | Medstar - Salary                    |
| 2. 2015     | Self-employed (expert witness fees) |
| 3.          |                                     |
| 4.          |                                     |

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

*(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*



NONE *(No reportable reimbursements.)*

|    | <u>SOURCE</u>                         | <u>DATES</u>   | <u>LOCATION</u>  | <u>PURPOSE</u>                      | <u>ITEMS PAID OR PROVIDED</u>                         |
|----|---------------------------------------|----------------|------------------|-------------------------------------|-------------------------------------------------------|
| 1. | University of Pennsylvania Law School | 3/26-3/27/2015 | Philadelphia, PA | 12th Annual Federal Judges Panel    | Train fare, hotel, meals, taxi                        |
| 2. | University of Chicago Law School      | 4/2-4/3/2015   | Chicago, IL      | Edward H. Levi Distinguished Jurist | Flight, hotel, airport transportation, meals, parking |
| 3. |                                       |                |                  |                                     |                                                       |
| 4. |                                       |                |                  |                                     |                                                       |
| 5. |                                       |                |                  |                                     |                                                       |

|                          |                |
|--------------------------|----------------|
| Name of Person Reporting | Date of Report |
| Jackson, Ketanji B.      | 07/11/2023     |

V. GIFTS. (Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☐ NONE (No reportable gifts.)

|    | SOURCE                              | DESCRIPTION                                                                 | VALUE      |
|----|-------------------------------------|-----------------------------------------------------------------------------|------------|
| 1. | Mr Jason Lemkin ( college roommate) | Paid for house rental in Hawaii for his family and invited Jacksons to join | \$1,500.00 |
| 2. |                                     |                                                                             |            |
| 3. |                                     |                                                                             |            |
| 4. |                                     |                                                                             |            |
| 5. |                                     |                                                                             |            |

VI. LIABILITIES. (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)

☒ NONE (No reportable liabilities.)

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

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)

☐

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

| A<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B<br>Income during<br>reporting period |                                        | C<br>Gross value at end<br>of reporting period |                                    | D<br>Transactions during reporting period |                  |                          |                         |  |
|----------------------------------------------------------------------------------------------------------------------------|----------------------------------------|----------------------------------------|------------------------------------------------|------------------------------------|-------------------------------------------|------------------|--------------------------|-------------------------|--|
|                                                                                                                            | (1)                                    | (2)                                    | (1)                                            | (2)                                | (1)                                       | (2)              | (3)                      | (4)                     |  |
|                                                                                                                            | Amount<br>Code 1<br>(A-H)              | Type (e g ,<br>div , rent,<br>or int ) | Value<br>Code 2<br>(J-P)                       | Value<br>Method<br>Code 3<br>(Q-W) | Type (e g ,<br>buy, sell,<br>redemption)  | Date<br>mm/dd/yy | Value<br>Code 2<br>(J-P) | Gain<br>Code 1<br>(A-H) |  |
| 1. Charles Schwab- Morrison & Foerster Retirement Plan (H)                                                                 |                                        |                                        |                                                |                                    |                                           |                  |                          |                         |  |
| 2. -PRIMECAP Oddessy Growth                                                                                                | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 3. -Schwab Inst LC Val Trust Fd Cls R                                                                                      | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 4. -Schwab S&P 500                                                                                                         | A                                      | Dividend                               | K                                              | T                                  |                                           |                  |                          |                         |  |
| 5. -Janus Triton 1                                                                                                         | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 6. -Victory Integrity Sm Cap Value Y                                                                                       | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 7. -Schwab Small Cap Index                                                                                                 | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 8. -Vanguard Mid Cap Index Ins                                                                                             | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 9. -Artisan International Small Cap Inv                                                                                    | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 10. -Dodge & Cox International Stock                                                                                       | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 11. -Schwab Instl CorePlus Fixed Inc III                                                                                   | A                                      | Dividend                               | K                                              | T                                  |                                           |                  |                          |                         |  |
| 12. -Vanguard Total Intl Stock Index                                                                                       | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 13. TIAA-Cref Money Market fund                                                                                            | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 14. Black Rock Money Market Class A                                                                                        | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 15. Black Rock Large Cap Core- Class A                                                                                     | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 16. Northeast Investors Growth Fund                                                                                        | A                                      | Dividend                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 17. Fidelity -Medstar Retirement Program (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

VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)

☐

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

| A<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B<br>Income during<br>reporting period |                                        | C<br>Gross value at end<br>of reporting period |                                    | D<br>Transactions during reporting period |                  |                          |                         |  |
|----------------------------------------------------------------------------------------------------------------------------|----------------------------------------|----------------------------------------|------------------------------------------------|------------------------------------|-------------------------------------------|------------------|--------------------------|-------------------------|--|
|                                                                                                                            | (1)                                    | (2)                                    | (1)                                            | (2)                                | (1)                                       | (2)              | (3)                      | (4)                     |  |
|                                                                                                                            | Amount<br>Code 1<br>(A-H)              | Type (e g ,<br>div , rent,<br>or int ) | Value<br>Code 2<br>(J-P)                       | Value<br>Method<br>Code 3<br>(Q-W) | Type (e g ,<br>buy, sell,<br>redemption)  | Date<br>mm/dd/yy | Value<br>Code 2<br>(J-P) | Gain<br>Code 1<br>(A-H) |  |
| 18. -MedStar Health, Inc. Cash Balance Retirement Plan (cash)                                                              | D                                      | Int./Div.                              | M                                              | T                                  |                                           |                  |                          |                         |  |
| 19. PNC Checking                                                                                                           | A                                      | Interest                               | J                                              | T                                  |                                           |                  |                          |                         |  |
| 20. PNC Checking                                                                                                           |                                        | None                                   | K                                              | T                                  |                                           |                  |                          |                         |  |
| 21. TD Bank Checking                                                                                                       |                                        | None                                   | L                                              | T                                  |                                           |                  |                          |                         |  |
| 22. The Education Plan- My 529- Age Based Portfolio                                                                        | A                                      | Int./Div.                              | J                                              | T                                  |                                           |                  |                          |                         |  |
| 23. NY's 529 College Savings Program- Age Based Portfolio                                                                  | A                                      | Int./Div.                              | J                                              | T                                  |                                           |                  |                          |                         |  |

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

**FINANCIAL DISCLOSURE REPORT**

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|                                 |                       |
|---------------------------------|-----------------------|
| <b>Name of Person Reporting</b> | <b>Date of Report</b> |
| Jackson, Ketanji B.             | 07/11/2023            |

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

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value, per page 45 of the filing instructions.

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Jackson, Ketanji B.

Date of Report

07/11/2023

## 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. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ **Ketanji B. Jackson**

**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. § 13106)**

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