

FINANCIAL DISCLOSURE REPORT
FOR CALENDAR YEAR 2023

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

1. Person Reporting (last name, first, middle initial) Roberts, Jr, John G.	2. Court or Organization Supreme Court of the United States	3. Date of Report 05/15/2024
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Chief Justice of the United States	5a. Report Type (check appropriate type) ☐ Nomination Date ☐ Initial ☒ Annual ☐ Final	6. Reporting Period 01/01/2023 to 12/31/2023
	5b. ☐ Amended Report	
7. Chambers or Office Address One First Street, NE Washington, DC 20543		
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 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.)

<u>POSITION</u>	<u>NAME OF ORGANIZATION/ENTITY</u>
1.	
2.	
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.)

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

Name of Person Reporting	Date of Report
Roberts, Jr, John G.	05/15/2024

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

[X] NONE (No reportable non-investment income.)

DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.		
2.		
3.		
4.		

B. Spouse's Non-Investment Income - If you were married during any portion of the reporting year, complete this section.
(Dollar amount not required except for honoraria.)

[] NONE (No reportable non-investment income.)

DATE	SOURCE
1. 2023	Macrae, Inc. -- Attorney Search Consultants -- recoverable base salary and commission
2. 2023	Pillsbury Winthrop Shaw Pittman LLP -- payment from unfunded, non-qualified deferred compensation plan
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.)

[X] NONE (No reportable reimbursements.)

SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.				
2.				
3.				
4.				
5.				

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.		
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. 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)	
	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)	
1. Lam Research (Common) LRCX	B	Dividend	N	T					
2. Thermo Fisher (Common) TMO	B	Dividend	O	T					
3. Amer. Century Gro. Inv. Class I TWGIX	C	Dividend	M	T					
4. MetLife GVUL: Putnam VT Sustainable Leaders Fund PNOPX (see Part VIII)	B	Dividend	L	T					
5. Vanguard Int'l Gr Fund Admiral Shares VWILX	B	Dividend	M	T					
6. Vanguard Sm-Cap Index Fund Admiral VSMAX	C	Dividend	M	T					
7. Wells Fargo bank accounts	F	Interest	P1	T					
8. Capital One, Inc. bank accounts	A	Interest	N	T					
9. Caraheen Partners 1/8 int cottage, Knocklong, County Limerick, Ireland	A	Rent	J	W					
10. my529 Equity - 10% Int'l UTSNX		None	N	T					
11. my529 Enrolled UTAWX		None	K	T					
12. First Eagle Global SGIIX	E	Dividend	O	T	Buy (add'l)	02/27/23	J		
13.					Buy (add'l)	07/27/23	K		
14.					Sold (part)	10/16/23	K	C	
15.					Buy (add'l)	10/16/23	L		
16. T. Rowe Price Blue Chip Growth TRBCX	E	Dividend	O	T	Sold (part)	10/13/23	J	C	
17.					Sold (part)	10/16/23	L	E	

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.)

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

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	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	
	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)	
18.					Buy (add'l)	10/16/23	L		
19. Dodge & Cox FDS International Stock DODFX	D	Dividend	N	T	Sold (part)	10/16/23	J	A	
20. Principal MidCap Institutional PCBIX	E	Dividend	O	T	Sold (part)	10/16/23	J	B	
21.					Buy (add'l)	10/16/23	K		
22. Virtus Alternatives CL I GAFYX (see Part VIII)	D	Dividend	M	T	Sold (part)	03/07/23	K		
23.					Sold (part)	10/16/23	J		
24. my529-FDIC-Insured Static Investment Option UTSIX		None	N	T					
25. Tweedy Browne Global Value Fund TBGVX	D	Dividend	M	T	Buy (add'l)	10/16/23	L		
26. T Rowe Price Short-Term Bond PRWBX	D	Dividend	N	T	Buy (add'l)	10/16/23	J		
27. Vanguard Div. Growth Fd Investor Shares VDIGX	E	Dividend	P1	T					
28. Gateway Fund GTEYX	B	Dividend	M	T	Buy (add'l)	01/27/23	J		
29.					Buy (add'l)	10/16/23	K		
30. Vanguard Total Stk Mkt Index Fd Adm Shs VTSAX	C	Dividend	N	T	Buy (add'l)	02/27/23	J		
31.					Buy (add'l)	09/27/23	K		
32.					Buy (add'l)	10/16/23	L		
33.					Buy (add'l)	11/30/23	L		
34.					Buy (add'l)	12/27/23	K		

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

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

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R =Cost (Real Estate Only)

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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)
35.	Goldman Finl Sq Treas Money Market Fund FTIXX	D	Dividend	O	T	Sold (part)	01/13/23	J	
36.						Buy (add'l)	01/27/23	J	
37.						Sold (part)	02/17/23	J	
38.						Buy (add'l)	03/07/23	J	
39.						Sold (part)	04/14/23	J	
40.						Buy (add'l)	05/26/23	J	
41.						Sold (part)	06/16/23	J	
42.						Sold (part)	07/14/23	J	
43.						Buy (add'l)	07/27/23	K	
44.						Sold (part)	08/18/23	J	
45.						Sold (part)	10/13/23	J	
46.						Buy (add'l)	10/16/23	O	
47.	Wells Fargo IRA / Inv. Co. Amer. Class C AICCX	A	Dividend	K	T	Buy (add'l)	02/14/23	J	
48.	MetLife GVUL: Deutsche Govt. Money Mkt VIP	A	Dividend	J	T				
49.	MetLife GVUL: Putnam VT Large Cap Growth Fund POGAX (see Part VIII)	A	Dividend	L	T				
50.	Bost.Ptnrs. L/S Rsrch. Fund BPIRX	D	Dividend	M	T	Sold (part)	10/16/23	J	
51.	Charles Schwab bank account	A	Interest	K	T				

1. Income Gain Codes:
(See Columns B1 and D4)

2. Value Codes
(See Columns C1 and D3)

3. Value Method Codes
(See Column C2)

A =\$1,000 or less
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H1 =\$1,000,001 - \$5,000,000
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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.)

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	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	
	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)	
52. C. Schwab Value Advantage M. Fund SWVXX	E	Dividend	N	T					
53. Tributary SM Co INSTL IP FOSBX	D	Dividend	N	T	Buy (add'l)	01/27/23	J		
54.					Sold (part)	10/16/23	J		
55.					Buy (add'l)	10/16/23	L		
56.					Sold (part)	11/29/23	L		
57. Credit Suisse Comm Ret. I CRSOX	C	Dividend			Buy (add'l)	01/27/23	J		
58.					Sold	04/27/23	N		
59. MFS Value I MEIIX	F	Dividend	O	T	Buy (add'l)	01/27/23	J		
60.					Buy (add'l)	02/27/23	J		
61.					Buy (add'l)	06/27/23	J		
62.					Buy (add'l)	08/25/23	K		
63.					Buy (add'l)	10/16/23	L		
64.					Sold (part)	10/16/23	J	C	
65.					Buy (add'l)	10/27/23	K		
66. TriNet Ret. Plan (H)									
67. -- TA Vanguard Instl Target Ret. 2020 VITWX	D	Dividend	M	T	Buy (add'l)	01/13/23	J		
68.					Buy (add'l)	01/31/23	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)

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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.)

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	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	
	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)	
69.					Buy (add'l)	04/19/23	K		
70. Investment Account #1 (H)									
71. -- Janney Advantage Insured Sweep Cash Account	A	Interest	K	T					
72. -- American Balanced CL F2 AMBFX	C	Dividend	M	T	Buy (add'l)	04/04/23	M		
73.					Sold (part)	05/05/23	M	E	
74.					Sold (part)	10/26/23	J	A	
75. -- American Global Balanced CL F2 GBLFX	A	Dividend	K	T	Sold (part)	10/26/23	J	A	
76. -- American Inflation Linked Bond CL F2 BFIGX	A	Dividend	K	T	Sold (part)	04/04/23	K		
77.					Buy (add'l)	05/05/23	K		
78. -- American Mutual CL F2 AMRFX	B	Dividend	K	T					
79. -- Capital Income Builder CL F2 CAIFX	C	Dividend	M	T	Sold (part)	10/26/23	J	A	
80. -- Income Fund of America CL F2 AMEFX	D	Dividend	M	T	Buy (add'l)	05/05/23	J		
81.					Sold (part)	10/26/23	J	A	
82. -- American High Income CL F2 AHIFX	C	Dividend	K	T	Sold (part)	04/04/23	K		
83.					Buy (add'l)	05/05/23	K		
84.					Sold (part)	10/26/23	J		
85. -- Capital World Growth & Income CL F2 WGIFX	C	Dividend	L	T	Sold (part)	04/04/23	L		

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(See Columns B1 and D4)

2. Value Codes
(See Columns C1 and D3)

3. Value Method Codes
(See Column C2)

A =\$1,000 or less
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P3 =\$25,000,001 - \$50,000,000
Q =Appraisal
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86.					Buy (add'l)	05/05/23	L	
87.					Sold (part)	10/26/23	J	
88. -- Amcap CL F2 AMCFX	B	Dividend	K	T	Sold (part)	04/04/23	K	
89.					Buy (add'l)	05/05/23	K	
90.					Sold (part)	10/26/23	J	
91. -- American Multisector Income CL F2 MIAYYX	C	Dividend	L	T	Sold (part)	04/04/23	K	
92.					Buy (add'l)	05/05/23	K	
93.					Sold (part)	10/26/23	J	
94. American Funds SmallCap World Amer. Class C SCWCX	A	Dividend	J	T	Buy (add'l)	02/14/23	J	
95. American Funds New World Fund Class C NEWCX	A	Dividend	J	T	Buy (add'l)	02/14/23	J	
96. BlackRock Global Allocation I MALOX	C	Dividend	M	T	Buy (add'l)	10/16/23	J	
97. Cottage, Knox County, Maine, United States	E	Rent	N	W				
98. Baird Short-Term Muni Bond BTMIX	D	Dividend	N	T	Buy (add'l)	02/27/23	J	
99.					Buy (add'l)	03/08/23	K	
100.					Buy (add'l)	03/27/23	K	
101.					Buy (add'l)	04/28/23	K	
102.					Buy (add'l)	06/27/23	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)

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103.					Buy (add'l)	09/27/23	J	
104.					Buy (add'l)	10/16/23	L	
105.					Buy (add'l)	11/27/23	K	
106. T Rowe Price Summit Municipal Income Fund PRINX	B	Dividend	M	T	Buy (add'l)	02/27/23	J	
107.					Buy (add'l)	05/26/23	K	
108.					Buy (add'l)	09/27/23	J	
109.					Buy (add'l)	10/16/23	K	
110. Pimco Long Duration Total Return Fund PLRIX	C	Dividend	M	T	Buy (add'l)	10/16/23	K	
111. Davis New York Venture Fund Class Y DNVYX	D	Dividend	M	T	Buy (add'l)	10/16/23	J	
112. Allspring Emerging Markets Equity Income Fund EQIIX	D	Dividend	O	T	Buy (add'l)	02/27/23	J	
113.					Buy (add'l)	04/28/23	K	
114.					Buy (add'l)	08/25/23	K	
115.					Buy (add'l)	10/16/23	L	
116. Macrae, Inc.		None	O	U				
117. Vanguard S&P 500 ETF VOO	D	Dividend	O	T	Buy	01/27/23	O	
118. ALPS/CORCMDTY MGMT STR I JCRIX	D	Dividend	N	T	Buy	04/28/23	M	
119.					Buy (add'l)	05/01/23	L	

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. 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)
	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)
120.					Buy (add'l)	10/17/23	K	
121. U.S. Treasury Bill (X)		None	O	T				
122. U.S. Treasury Bill (X)		None	O	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	Date of Report
Roberts, Jr, John G.	05/15/2024

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

Part VII., Line 4. The name Putnam Multi-Cap Growth fund (PNOPX) changed to the Putnam VT Sustainable Leaders fund (PNOPX).

Part VII., Line 22. The name AlphaSimplex Global Alternatives CL Y fund (GAFYX) changed to the Virtus AlphaSimplex Global Alternatives CL I fund (GAFYX).

Part VII., Line 49. The name Putnam VT Growth Opportunities fund (POGAX) changed to the Putnam VT Large Cap Growth fund (POGAX).

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting	Date of Report
Roberts, Jr, John G.	05/15/2024

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/ John G. Roberts, Jr**

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 13106)

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