

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) Jackson, Ketanji B.	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) Associate Justice	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, N.E. Washington, D.C. 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.	Sole Member	KayPac LLC
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.	

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.)

DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1. 2023	Penguin Random House (book advance paid through KayPac LLC)	\$893,750.00
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	MedStar (salary)
2.	
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.)

SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1. Boston University	May 20-22, 2023	Boston, MA	Commencement (speaker & honorary degree recipient)	Transportation, meals, hotel
2. Delta Sigma Theta Sorority, Inc.	July 18-20, 2023	Indianapolis, IN	National Convention (honoree for professional achievement)	Transportation, meals, hotel
3. 16th Street Baptist Church	September 13-19, 2023	Birmingham, AL	Commemoration event (speaker)	Transportation, meals, hotel
4. UAB Birmingham	September 13-19, 2023	Birmingham, AL	Grand Rounds (speaker)	Transportation, meals, hotel

Name of Person Reporting	Date of Report
Jackson, Ketanji B.	05/15/2024

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.	Lonnie Holley	Artwork for Chambers	\$10,000.00
2.	Beyonce Knowles-Carter	Concert Tickets (4)	\$3,711.84
3.	Dr. Kathi Earles-Ross and HU Scholars	Artwork for Chambers	\$2,500.00
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. Individual Assets (H)								
2. PNC Bank (cash)	A	Interest	J	T				
3. TD Bank (cash)		None	J	T				
4. TIAA-Cref Money Market Fund	A	Dividend	J	T				
5. Black Rock Money Market Class A	A	Dividend	J	T				
6. Black Rock Wealth Liquid Env Aware	A	Dividend	J	T				
7. Black Rock Large Cap Core- Class A	A	Dividend	J	T				
8. Account #1 (H)								
9. PRIMECAP Odyssey Growth (POGRX)	B	Dividend			Sold	12/11/23	K	D
10. Schwab Inst Large Cap Val Trust Fd In		None			Sold	12/11/23	K	D
11. Schwab S&P 500 (SWPPX)	A	Dividend			Sold	12/11/23	K	E
12. DFA US Target Value I (DFFVX)	A	Dividend			Sold	12/11/23	J	A
13. Schwab Small Cap Index (SWSSX)	A	Dividend			Sold	12/11/23	J	D
14. Vanguard Mid Cap Index Ins (VMCIX)	A	Dividend			Sold	12/11/23	J	C
15. Dodge & Cox International Stock (DODFX)	A	Dividend			Sold	12/11/23	J	C
16. T. Rowe Price International Discovery Fund (PRIDX)	A	Dividend			Sold	12/11/23	J	B
17. Vanguard Total Intl Stock Index (VGTSX)	A	Dividend			Sold	12/11/23	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 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.)

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)
18. Schwab Instl CorePlus Fixed Inc III		None			Sold	12/11/23	K	C
19. Account #2 (H)								
20. MedStar Health, Inc. Cash Balance Retirement Plan (cash)		None	M	T				
21. Account #3 (H)								
22. NY's 529 College Savings Plan, Growth Portfolio		None	J	T				
23. Account #4 (H)								
24. The Education Plan Enrollment Portfolio		None	J	T				

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		

Name of Person Reporting Jackson, Ketanji B.	Date of Report 05/15/2024
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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Part I, line 1: KayPac LLC contains only cash that is included in Part VII; it is not otherwise reportable.

Part IV, lines 1-4: These events were attended for professional purposes.

Part V, line 1: Valuation is based upon a review of similar pieces by this artist offered for sale by a gallery.

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.

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Name of Person Reporting	Date of Report
Jackson, Ketanji B.	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/ **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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