AO 10*
Rev. 1/2022

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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)	2. Court or Organization	3. Date of Report
Lee, John Z.	U.S. Court of Appeals, Seventh Circuit	08/03/2023
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
Article III Judge (active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
219 South Dearborn Street Room 2612 Chicago, Illinois 60604		

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.)*

POSITION	NAME OF ORGANIZATION/ENTITY
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.)*

DATE	PARTIES AND TERMS
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.			
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.	2022	Self-employed physician
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.					
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.			

Name of Person Reporting	Date of Report
Lee, John Z.	08/03/2023

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 (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1. IRA Account #1 (H)									
2. - Am. Beacon High Yield Fund	A	Dividend			Sold	10/26/22	K		
3. - Am. Beacon Large Cap Value Fund		None			Sold	10/18/22	M		
4. - Artisan Mid Cap Fund	A	Dividend	L	T					
5. - Artisan International Value Fund		None			Sold	09/12/22	L		
6.					Buy (add'l)	11/23/22	J		
7. - Calamos Mkt Neutral Income Fund		None			Sold	11/22/22	M	A	
8. - Clearbridge Large Cap Growth Fund		None			Sold	11/22/22	L		
9. - Clearbridge International Growth Fund		None			Sold	11/02/22	K		
10. - DWA Enhanced Commodity Strategy Fund	D	Dividend	K	T	Sold (part)	06/30/22	J		
11. - Invesco Oppenheimer Main Street Small Cap Fund		None			Sold	10/26/22	K		
12. - Invesco Oppenheimer Developing Market Fund		None			Sold	10/20/22	K	A	
13. - Janus Henderson Venture Fund		None			Sold	12/09/22	K	B	
14. - Prudential PGIM Total Return Bond Fund	A	Dividend			Sold	04/21/22	J		
15.					Sold	10/22/22	K		
16. - Vanguard Total Stock Market Index ETF	B	Dividend			Sold	11/22/22	M		
17. - WisdomTree US Mid Cap Dividend ETF	A	Dividend			Sold	12/26/22	K	A	

1. Income Gain Codes: (See Columns B1 and D4)	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
	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 (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	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 (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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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 (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
18. - Loomis Sayles Interm Duration Bond Y	A	Dividend			Buy	08/02/22	K		
19.					Sold	11/22/22	K		
20. - Goldman Sacks Bank Money Market Fund	A	Dividend			Sold	08/16/22	J		
21. - Truist Bank Money Market Fund	A	Dividend			Sold	08/16/22	J		
22. - UBS Bank USA Money Market Fund	A	Dividend			Sold	08/16/22	J		
23. - Vanguard Allwrld Ex US ETF	A	Dividend	K	T	Buy	11/02/22	K		
24. - Vanguard Vng Rus 1000Grw ETF	A	Dividend	L	T	Buy	11/22/22	L		
25. - Vanguard S&P 500 ETF Shs	A	Dividend	L	T	Buy	10/18/22	K		
26.					Buy (add'l)	11/22/22	L		
27. - Vanguard Sml Cap Grw ETF	A	Dividend	K	T	Buy	10/26/22	K		
28. - Dimensional Fund Advisors Intl Core Eqty Inst	B	Dividend	M	T	Buy	09/12/22	L		
29.					Buy (add'l)	12/09/22	K		
30. - Dimensional Fund Advisors Emrg Mkts Core Eqty Inst	A	Dividend	K	T	Buy	10/20/22	K		
31. - Dimenstional Fund Advisors US Sm Cap Value Inst	C	Dividend	L	T	Buy	10/26/22	K		
32.					Buy	11/22/22	K		
33. - Dimensional Fund Advisors US Lg Cap Value Inst	C	Dividend	M	T	Buy	10/18/22	L		
34. - Dimensional Fund Advisors Real Estate Sec Inst	C	Dividend	M	T	Buy	11/22/22	K		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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35. - Doubleline Funds Total Ret Bond I	A	Dividend	K	T	Buy	10/20/22	K		
36. - Vanguard Total Bond Mkt Index Admiral	A	Dividend	M	T	Buy	11/22/22	M		
37. - Vanguard High Yield Corp Admiral	A	Dividend	K	T	Buy	10/26/22	K		
38. - FDIC Insured Deposit Account	A	Dividend	J	T	Buy	11/16/22	J		
39. IRA Account #2 (H)									
40. - Vanguard Emerging Mkrs Select Stock Mutual Fund		None			Sold	11/30/22	J		
41. - Vanguard Intermed. Term Invest. Grade Bond Fund	A	Dividend			Sold	11/30/22	J		
42. - Vanguard High Yield Corporate Bond Mut Fund	A	Dividend	J	T					
43. - Vanguard International Value Mut. Fund		None			Sold	11/30/22	J		
44. - Vanguard STAR Mut Fund		None			Sold	11/30/22	J		
45. - Vanguard Total Stock Market Mut. Fund	A	Dividend			Sold	11/30/22	K	C	
46. - UBS Bank Money Market Fund		None			Sold	08/22/22	J		
47. - Dimensional Fund Advisors Intl Core Eqty Inst	A	Dividend	K	T	Buy	11/30/22	K		
48. - FDIC Insured Deposit Account	A	Dividend	J	T	Buy	08/22/22	J		
49. Trust # 1 (H)									
50. - T. Rowe Price Ret. 2035 Mut. Fund	E	Dividend	O	T					
51. - T. Rowe Price Ret. 2040 Mutual Fund	E	Dividend	M	T					

1. Income Gain Codes: (See Columns B1 and D4) — 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; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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52. IRA Account #3 (H)									
53. - Am. Beacon Large Cap Value Fund		None			Sold	10/18/22	L		
54. - Artisan International Value Mutual Fund		None			Sold	09/12/22	K		
55. - Calamos Mkt Neutral Income Fund	A	Dividend			Sold	11/22/22	L		
56. - Clearbridge International Growth Fund		None			Sold	11/02/22	J		
57. - Clearbridge Large Cap Growth		None			Sold	11/22/22	L		
58. - Clearbridge Small Cap Fund	A	Dividend			Sold	10/16/22	J	A	
59. - DWS Enhanced Commodity Strategy Fund	C	Dividend	J	T	Buy (add'l)	04/25/22	J		
60.					Sold (part)	06/30/22	J		
61. - Invesco Developing Mkt Fund		None			Sold	10/20/22	J		
62. - Invesco Main Street Small Cap Mutual Fund		None			Sold	10/26/22	K		
63. - Janus Enterprise Fund		None			Sold	12/09/22	K		
64. - Loomis Sayles Interm Dur Bond Y	A	Dividend			Buy	08/02/22	K		
65.					Sold	10/02/22	K		
66. - PGIM Short Dur High Yield Fund	A	Dividend			Sold	11/18/22	K		
67. - PGIM Funds Total Return Bond Fund	A	Dividend			Sold	10/20/22	J		
68. - Vanguard Total Stock Market Fund	A	Dividend			Sold	11/22/22	L		

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2. Value Codes (See Columns C1 and D3)
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3. Value Method Codes (See Column C2)
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69. - Citibank NA Money Market Fund	A	Dividend			Sold	08/22/22	J		
70. - Goldman Sacks Bank USA Money Market Fund	A	Dividend			Sold	08/22/22	J		
71. - Morgan Stanley Private Bank Money Market Fund	A	Dividend			Sold	08/22/22	J		
72. -Truist Bank Money Market Fund	A	Dividend			Sold	08/22/22	J		
73. - UBS Bank USA Money Market Fund	A	Dividend			Sold	08/22/22	J		
74. - Vanguard Allwrld Ex US ETF	A	Dividend	J	T	Buy	11/02/22	K		
75. - Vanguard Vng RUS 1000 Grw ETF	A	Dividend	L	T	Buy	11/22/22	L		
76. - Vanguard S&P 500 ETF Shs	A	Dividend	L	T	Buy	10/18/22	K		
77.					Buy (add'l)	11/22/22	K		
78. - Vanguard Small Cap Grw ETF	A	Dividend	K	T	Buy	10/26/22	K		
79. - Dimensional Fund Advisors Intl Mkts Core Eqty	A	Dividend	L	T	Buy	09/12/22	K		
80. - Dimensional Fund Advisors EmrgMkts Core Eqty	A	Dividend	K	T	Buy	10/20/22	K		
81. - Dimensional Fund Advisors US Sm Cap Value Inst	B	Dividend	K	T	Buy	10/26/22	K		
82. - Dimensional Fund Advisors US Lrg Cap Value Inst	B	Dividend	L	T	Buy	10/18/22	L		
83. - Dimensional Fund Advisors Real Estate Se Inst	B	Dividend	K	T	Buy	11/30/22	K		
84. - Doubleline Funds Total Ret Bond I	A	Dividend	K	T	Buy	10/20/22	K		
85. - Vanguard Total Bond Mkt Index Admiral	A	Dividend	L	T	Buy	11/22/22	L		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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86. - FDIC Insured Deposit Account	A	Dividend	J	T	Buy	11/22/22	J		
87. Investment Account #1 (H)									
88. - Artisan International Value Mutual Fund		None			Sold	09/12/22	K		
89. - Calamos Market Neutral Income Mutual Fund	A	Dividend			Sold	11/15/22	L		
90. - Clearbridge International Growth Fund	A	Dividend			Sold	05/06/22	J		
91. - DWS Intermediate Tax-Free Mut. Fund	A	Dividend			Sold	05/06/22	J		
92. - iShares Russell 2500 ETF		None			Sold	05/06/22	J		
93. - iShares Russell 1000 Value ETF		None			Sold	11/15/22	J		
94. - iShares Russell 2000 ETF	A	Dividend	K	T					
95. - iShare Russell Mid Cap ETF	A	Dividend	K	T					
96. - Loomis Sayles Growth Mut. Fund	A	Dividend			Sold	05/06/22	K	D	
97. - PGIM Floating Rate Income Fund	A	Dividend			Sold	09/21/22	J		
98. - Invesco Developing Markets Fund	A	Dividend			Sold	05/06/22	J		
99. - Vanguard FTSE Developed Markets ETF	A	Dividend	J	T					
100. - Vanguard FTSE Emerging Market ETF	A	Dividend			Sold	05/06/22	K	A	
101. - Vanguard Total Stock Market ETF		None			Sold	09/16/22	M		
102. - Western Asset Managed Municipal Fund	A	Dividend			Sold	11/01/22	J		

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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 (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
103. - SPDR Emerging Markets ETF		None			Buy	05/06/22	K		
104.					Sold	11/01/22	J		
105. - WisdomTree US Large Cap Dividend ETF	A	Dividend	L	T					
106. - JP Morgan ETF Trust Municipal ETF	A	Dividend			Buy	05/06/22	K		
107.					Sold	11/01/22	K		
108. - Citibank NA Money Market Fund	A	Dividend			Sold	08/22/22	J		
109. - Goldman Sacks Bank Money Market Fund	A	Dividend			Sold	08/22/22	J		
110. - Vanguard Growth Growth ETF	A	Dividend	K	T					
111. - Dimensional ETF Tr US Core Eqty ETF	B	Dividend	M	T	Buy	09/16/22	M		
112. - Dimensional ETF Tr Intl Mkts Core Eqty	A	Dividend	K	T	Buy	09/12/22	K		
113. - Dimensional ETF Tr Emerging Core Equity Mrkt	A	Dividend	K	T	Buy	11/01/22	J		
114. - Vanguard Intmd Term Tax-Exempt Admiral	A	Dividend	K	T	Buy	11/01/22	K		
115. - US Treasury Bills		None	K	T	Buy	11/03/22	K		
116. - US Treasury Notes		None	L	T	Buy	11/16/22	L		
117. - FDIC Insured Deposit Account	A	Dividend	J	T	Buy	08/22/22	J		
118. Investment Account #2 (H)									
119. - Artisan International Value Fund		None			Sold	09/12/22	K		

1. Income Gain Codes: (See Columns B1 and D4)
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
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 (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
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 (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
S =Assessment
T =Cash Market
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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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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
120. - Calamos Funds Hedged Equity Fund	A	Dividend	K	T					
121. - Calamos Market Neautral Income Fund	A	Dividend			Buy (add'l)	04/21/22	J		
122.					Sold	11/15/22	L		
123. - iShares Russell 2500 ETF	A	Dividend							
124. - iShares Russell 2500 ETF	A	Dividend			Sold	11/15/22	K		
125. - iShares Russell Mid Cap ETF	A	Dividend	J	T	Buy	04/21/22	J		
126. - iShares Short Term National Municipal ETF	A	Dividend	K	T	Buy	04/21/22	K		
127. - PGIM Floating Rate Income Fund	A	Dividend			Sold (part)	05/23/22	J		
128.					Sold	09/21/22	J		
129. - T. Rowe Prie Total Stock Equity Market Index Fund	A	Dividend			Sold	05/23/22	J		
130. - Vanguard FTSE Merging Markets ETF	A	Dividend			Sold	11/01/22	J		
131. - Victory Tax Exempt Fund	A	Dividend			Sold	05/23/22	J		
132. - WisdomTree US Dividend Growth ETF	A	Dividend			Sold	09/14/22	M		
133. - JP Morgan ETF Trust Municipal ETF	A	Dividend			Buy	07/22/22	J		
134.					Sold	11/01/22	J		
135. - Citibank NA Money Market Fund	A	Dividend			Sold	08/23/22	J		
136. - Goldman Sacks Bank Money Market Fund	A	Dividend			Sold	08/23/22	J		

1. Income Gain Codes: (See Columns B1 and D4)	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
	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 (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
137. -Truist Bank Money Market Fund	A	Dividend			Sold	08/23/22	J		
138. - UBS Bank USA Money Market Fund	A	Dividend			Sold	08/23/22	J		
139. - Dimensional ETF Tr US Core Eqty ETF	A	Dividend	M	T	Buy	09/14/22	M		
140. - Dimensional ETF Tr Intl Mkts Core Eqty	A	Dividend	K	T	Buy	09/12/22	K		
141. - Dimensional ETF Tr Emerging Core Equity Mrkt	A	Dividend	K	T	Buy	11/01/22	J		
142. - Vanguard Intermed Term Tax-Exempt Admiral	A	Dividend	J	T	Buy	11/01/22	J		
143. - US Treasury Bills		None	K	T	Buy	11/03/22	K		
144. - US Treasury Notes		None	L	T	Buy	11/16/22	L		
145. - FDIC Insured Deposit Account	A	Dividend	J	T	Buy	11/23/22	J		
146. Bright Directions 529 Savings #1 (H)									
147. - Bright Directions 529 Baird Short-Term Bond Fund		None			Sold	11/01/22	K		
148. - Bright Directions 529 BlackRock Inflation Protected Bond Fund		None			Sold	11/01/22	K		
149. - Bright Directions 529 Invesco Government Agency Portfolio	A	Dividend	K	T	Buy (add'l)	11/01/22	K		
150.					Buy (add'l)	11/07/22	J		
151.					Buy (add'l)	12/06/22	J		
152.					Sold (part)	12/12/22	K		
153. - Bright Directions 529 Northern Funds Stock Index Portfolio		None			Sold	11/01/22	K		

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154. - Bright Directions T. Rowe Price Equity Income Portfolio		None			Sold	11/01/22	K		
155. - Bright Directions T. Rowe Price Extended Equity Mkt Portfolio		None			Sold	11/01/22	K		
156. - Bright Directions 529 Vanguard Short-Term Bond ETF Portfolio		None	K	T	Buy	11/01/22	K		
157.					Buy (add'l)	11/07/22	J		
158. - Bright Directions 529 Vanguard Mega Cap ETF Portfolio		None	L	T	Buy	11/01/22	L		
159.					Buy (add'l)	11/07/22	J		
160. - Bright Directions 529 Vanguard Mid-Cap ETFPortfolio		None	J	T	Buy	11/01/22	J		
161.					Buy (add'l)	11/07/22	J		
162. - Bright Directions 529 Vanguard Small-Cap ETF Portfolio		None	J	T	Buy	11/01/22	J		
163.					Buy (add'l)	11/07/22	J		
164.									
165. Bright Directions 529 Savings #2 (H)									
166. - Bright Directions 529 Invesco Government & Agency Portfolio	A	Dividend	L	T					
167. - Bright Directions 529 Northern Funds Stock Index Portfolio		None	M	T					
168. - Bright Directions T. Rowe Price Extended Equity Mkt Portfolio		None	J	T					
169. Apple (AAPL)		None	K	T					
170. Amazon (AMZN)		None	K	T					

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171. Johnson & Johnson (JNJ)	A	Dividend	J	T					
172. Revolution Lighting (RVLT)		None	J	T					
173. Schwab One Interest Account	A	Interest	J	T					
174. JP Morgan Chase Bank Accounts	A	Interest	M	T					

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

Name of Person Reporting	Date of Report
Lee, John Z.	08/03/2023

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

Signature: s/ John Z. Lee

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

Committee on Financial Disclosure
Administrative Office of the United States Courts
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