AO 10*
Rev. 1/2021

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

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	06/14/2024
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	01/01/2023 **to** 12/31/2023
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 pp. 9-13 of filing instructions.)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Board member	[redacted] Condominium Association
2.		
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions.)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

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.)*

	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 AND TYPE
1.	2023	Self-employed physician
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.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	National Conference of Bankruptcy Judges	10/11/23 to 10/12/23	Austin, TX	Legal education speaker	Transportation, food, and lodging
2.					
3.					
4.					
5.					

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.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Lee, John Z.	06/14/2024

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 (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)	D. (5) Identity of buyer/seller (if private transaction)
1. IRA Account #1 (H)									
2. - Artisan Mid Cap Fund		None	K	T					
3. - Artisian International Value Fund		None			Sold	03/13/23	L		
4. - DWA Enhanced Commodity Strategy Fund	A	Dividend	J	T					
5. - Vanguard Allwrld Ex US ETF	A	Dividend	K	T					
6. - Vanguard Vng Rus 1000Grw ETF	A	Dividend	M	T					
7. - Vanguard S&P 500 ETF Shs	A	Dividend	L	T					
8. - Vanguard Sml Cap Grw ETF	A	Dividend	L	T					
9. - Vanguard Total Stk Mkt ETF	B	Dividend	M	T					
10. - Dimensional Fund Advisors Intl Core Eqty Inst	C	Dividend	M	T					
11. - Dimensional Fund Advisors Emrg Mkts Core Eqty Inst	B	Dividend	K	T					
12. - Dimenstional Fund Advisors US Sm Cap Value Inst	B	Dividend	L	T					
13. - Dimensional Fund Advisors US Lg Cap Value Inst	C	Dividend	M	T					
14. - Dimensional Fund Advisors Real Estate Sec Inst	B	Dividend	L	T					
15. - Doubleline Funds Total Ret Bond I	B	Dividend	K	T					
16. - Vanguard Total Bond Mkt Index Admiral	C	Dividend	M	T					
17. - Vanguard High Yield Corp Admiral	B	Dividend	K	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

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

Name of Person Reporting	Date of Report
Lee, John Z.	06/14/2024

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)	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	Place "(X)" after each asset exempt from prior disclosure	(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)
18.	- FDIC Insured Deposit Account	A	Dividend	J	T					
19.	IRA Account #2 (H)									
20.	- Vanguard High Yield Corporate Bond Mut Fund	A	Dividend	J	T					
21.	- Dimensional Fund Advisors Intl Core Eqty Inst	A	Dividend	K	T					
22.	- Vanguard S&P 500 ETF	A	Dividend	K	T	Buy	09/05/23	K		
23.	- Vanguard SMall Cap	A	Dividend	K	T	Buy	04/19/23	K		
24.	- FDIC Insured Deposit Account	A	Dividend	K	T					
25.	Trust # 1 (H)									
26.	- T. Rowe Price Ret. 2035 Mut. Fund	E	Dividend			Sold	04/17/23	N	F	
27.	- T. Rowe Price Ret. 2040 Mutual Fund	E	Dividend			Sold	04/17/23	N	F	
28.	IRA Account #3 (H)									
29.	- DWS Enhanced Commodity Strategy Fund	A	Dividend	J	T					
30.	- Vanguard Allwrld Ex US ETF	C	Dividend	L	T	Buy (add'l)	04/20/23	L		
31.	- Vanguard Vng RUS 1000 Grw ETF	B	Dividend	M	T	Buy (add'l)	04/20/23	L		
32.	- Vanguard S&P 500 ETF Shs	B	Dividend	M	T	Buy (add'l)	04/20/23	L		
33.	- Vanguard Small Cap Grw ETF	A	Dividend	K	T					
34.	- Dimensional Fund Advisors Intl Mkts Core Eqty	D	Dividend	N	T	Buy (add'l)	04/19/23	M		

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35.	- Dimensional Fund Advisors EmrgMkts Core Eqty	C	Dividend	L	T	Buy (add'l)	04/19/23	L		
36.	- Dimensional Fund Advisors US Sm Cap Value Inst	C	Dividend	L	T	Buy (add'l)	04/19/23	L		
37.	- Dimensional Fund Advisors US Lrg Cap Value Inst	D	Dividend	M	T	Buy (add'l)	04/19/23	L		
38.	- Dimensional Fund Advisors Real Estate Se Inst	B	Dividend	L	T	Buy (add'l)	04/19/23	K		
39.	- Doubleline Funds Total Ret Bond I	B	Dividend	L	T	Buy (add'l)	04/19/23	L		
40.	- Vanguard Total Bond Mkt Index Admiral	C	Dividend	M	T	Buy (add'l)	04/20/23	L		
41.	- Vanguard High Yield Corp Admiral	B	Dividend	K	T	Buy	04/19/23	K		
42.	- FDIC Insured Deposit Account	A	Dividend	J	T					
43.	Investment Account #1 (H)									
44.	- iShares Russell 2000 ETF	A	Dividend	K	T					
45.	- iShare Russell Mid Cap ETF	A	Dividend	K	T					
46.	- Vanguard FTSE Developed Markets ETF	A	Dividend	J	T					
47.	- WisdomTree US Large Cap Dividend ETF	B	Dividend	L	T					
48.	- Vanguard Growth Growth ETF	A	Dividend	K	T					
49.	- Dimensional ETF Tr US Core Eqty ETF	C	Dividend	N	T					
50.	- Dimensional ETF Tr Intl Mkts Core Eqty	A	Dividend	L	T	Buy (add'l)	12/21/23	K		
51.	- Dimensional ETF Tr Emerging Core Equity Mrkt	A	Dividend	K	T	Buy (add'l)	12/21/23	K		

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52. - Vanguard Intmd Term Tax-Exempt Admiral	A	Dividend	K	T					
53. - Vanguard FTSE All World		None			Buy	12/18/23	K		
54. - Vanguard Russell 1000		None			Buy	12/18/23	K		
55. - US Treasury Bills		None			Matured	04/11/23	K		
56. - US Treasury Notes		None			Matured	04/11/23	L		
57. - FDIC Insured Deposit Account	A	Dividend	J	T					
58. Investment Account #2 (H)									
59. - Calamos Funds Hedged Equity Fund	A	Dividend			Sold	11/08/23	K		
60. - iShares Russell 2500 ETF	A	Dividend			Sold	06/21/23	J		
61. - iShares Russell Mid Cap ETF	A	Dividend			Sold	06/21/23	J		
62. - iShares Short Term National Municipal ETF	A	Dividend			Sold	11/08/23	K		
63. - Dimensional ETF Tr US Core Eqty ETF	B	Dividend	M	T					
64. - Dimensional ETF Tr Intl Mkts Core Eqty	A	Dividend	K	T					
65. - Dimensional ETF Tr Emerging Core Equity Mrkt	A	Dividend	J	T					
66. - Vanguard Intermed Term Tax-Exempt Admiral	A	Dividend			Buy (add'l)	06/12/23	J		
67.					Sold	11/08/23	K		
68. - US Treasury Bills		None			Matured	04/11/23	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
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69. - US Treasury Notes		None			Matured	03/13/23	L		
70. - FDIC Insured Deposit Account	A	Dividend	J	T					
71. Bright Directions 529 Savings #1 (H)									
72. - Bright Directions 529 Invesco Government Agency Portfolio	B	Dividend	J	T	Buy (add'l)	01/06/23	J		
73.					Buy (add'l)	02/06/23	J		
74.					Buy (add'l)	03/06/23	J		
75.					Sold (part)	03/27/23	J		
76.					Buy (add'l)	04/04/23	K		
77.					Buy (add'l)	04/06/23	J		
78.					Buy (add'l)	05/08/23	J		
79.					Buy (add'l)	06/06/23	J		
80.					Buy (add'l)	07/18/23	J		
81.					Sold (part)	07/24/23	J		
82.					Sold (part)	08/08/23	K		
83.					Buy (add'l)	08/18/23	J		
84.					Buy (add'l)	09/18/23	J		
85.					Buy (add'l)	10/18/23	J		

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3. Value Method Codes (See Column C2)
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86.					Sold (part)	11/17/23	K		
87.					Buy (add'l)	11/20/23	J		
88.					Buy (add'l)	12/18/23	J		
89. - Bright Directions 529 Vanguard Short-Term Bond ETF Portfolio		None	J	T	Sold (part)	04/04/23	J		
90.					Sold (part)	07/24/23	K		
91.					Buy (add'l)	11/20/23	J		
92.					Buy (add'l)	12/18/23	J		
93. - Bright Directions 529 Vanguard Mega Cap ETF Portfolio		None	L	T	Sold (part)	04/04/23	L		
94.					Buy (add'l)	11/20/23	J		
95.					Buy (add'l)	12/18/23	J		
96. - Bright Directions 529 Vanguard Mid-Cap ETFPortfolio		None	L	T	Buy (add'l)	04/04/23	J		
97.					Buy (add'l)	07/24/23	J		
98.					Buy (add'l)	11/20/23	J		
99.					Buy (add'l)	12/18/23	J		
100. - Bright Directions 529 Vanguard Small-Cap ETF Portfolio		None	J	T	Buy (add'l)	04/04/23	J		
101.					Buy (add'l)	07/24/23	J		
102.					Buy (add'l)	11/20/23	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
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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	
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103.						Buy (add'l)	12/18/23	J		
104.						Buy (add'l)	07/24/23	J		
105.	- Bright Directions Vanguard FTSE Dev. Mkts		None			Buy	04/04/23	K		
106.						Buy (add'l)	07/24/23	K		
107.						Buy (add'l)	11/20/23	J		
108.						Buy (add'l)	12/18/23	J		
109.	- Bright Directions Vanguard Emerging Mkts		None			Buy	07/24/23	J		
110.						Buy (add'l)	11/20/23	J		
111.						Buy (add'l)	12/18/23	J		
112.	- Bright Directions Vanguard Total Bond ETF		None			Buy	11/20/23	J		
113.						Buy (add'l)	12/18/23	J		
114.	Bright Directions 529 Savings #2 (H)									
115.	- Bright Directions 529 Invesco Government & Agency Portfolio	B	Dividend	K	T	Buy (add'l)	02/27/23	K		
116.						Sold (part)	07/24/23	J		
117.	- Bright Directions 529 Northern Funds Stock Index Portfolio					Sold	02/27/23	K		
118.	- Bright Directions T. Rowe Price Extended Equity Mkt Portfolio					Sold	02/27/23	K		
119.	- Bright Directions 529 Vanguard Short-Term Bond ETF Portfolio					Buy	02/27/23	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	
	U =Book Value	V =Other	W =Estimated		

Name of Person Reporting	Date of Report
Lee, John Z.	06/14/2024

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 (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)	D. (5) Identity of buyer/seller (if private transaction)
120.					Sold	07/24/23	K		
121. - Bright Directions 529 Vanguard Mega Cap ETF Portfolio		None	L		Buy	02/27/23	K		
122.					Buy (add'l)	07/24/23	J		
123. - Bright Directions 529 Vanguard Mid-Cap ETFPortfolio		None	J		Buy	07/24/23	J		
124. - Bright Directions 529 Vanguard Small-Cap ETF Portfolio		None	J	T	Buy	02/27/23	J		
125.					Buy (add'l)	07/24/23	J		
126. - Bright Directions Vanguard FTSE Dev. Mkts		None	K	T	Buy	02/27/23	K		
127.					Buy (add'l)	07/24/23	K		
128. - Bright Directions Vanguard Emerging Mkts		None	J	T	Buy	02/27/23	J		
129. Apple (AAPL)		None	K	T					
130. Amazon (AMZN)		None	K	T					
131. Johnson & Johnson (JNJ)	A	Dividend	J	T					
132. Revolution Lighting (RVLT)		None	J	T					
133. Schwab One Interest Account	A	Interest	J	T					
134. JP Morgan Chase Bank Accounts	A	Interest	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
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

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

Name of Person Reporting	Date of Report
Lee, John Z.	06/14/2024

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. § 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
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