AO 10 Rev. 3/2023

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)	2. Court or Organization	3. Date of Report
Alito, Jr., Samuel A.	Supreme Court of the United States	08/13/2024
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**
Associate Justice of the Supreme Court of the United States	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023

7. Chambers or Office Address
Supreme Court of the United States 1 First Street, NE Washington, DC 20544

***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.	Honorary Chair of the Advisory Council	Catholic Intellectual Tradition, Catholic University School of Law
2.	Honorary Advisory Board Member	Bolch Institute, Duke Law School
3.	Honorary Member of the Advisory Board	Franciscan Monastery for the Holy Land
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.		

Name of Person Reporting	Date of Report
Alito, Jr., Samuel A.	08/13/2024

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

☑ 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.		
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.					

Name of Person Reporting	Date of Report
Alito, Jr., Samuel A.	08/13/2024

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.	Gloria von Thurn und Taxis	Concert tickets	$900.00
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.	Edward Jones	Loan secured by account assets	J
2.			
3.			
4.			
5.			

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Alito, Jr., Samuel A.	08/13/2024

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)	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)	
1. Vang Inter Term Tax Ex Fund	D	Dividend	M	T					
2. Van LT Tax Ex Fund	A	Dividend	J	T					
3. Vanguard TE Mny Mkt	C	Dividend	M	T					
4. Vang Small Cap Stock Fund	D	Dividend	N	T					
5. Vang Total Stock Mkt Index F	D	Dividend	N	T					
6. Vanguard Windsor II Fund	C	Dividend	L	T					
7. Vang Star Mutual Fund	C	Dividend	L	T					
8. Vang Wellington Mut Fund	E	Dividend	N	T	Sold (part)	09/27/23	J	B	
9. Roth IRA (H)									
10. Edward Jones Investment (Cash account)	A	Interest	J	T					
11. - Discover Bk CD	A	Interest			Buy	04/18/23	J		
12.					Redeemed	08/22/23	J		
13. - Wells Fargo Bk NA 3.85%	A	Interest			Redeemed	04/11/23	J		
14. - AES Corp	A	Dividend	J	T					
15. - Anheuser Busch Inbev	A	Dividend			Sold	08/14/23	J		
16. - BHP Biliton PLC ADR	B	Dividend	K	T					
17. - Loccitane Luxembourg	A	Dividend	J	T					

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

☐ 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)	
18. - Molson Coors Beverage Co	A	Dividend	J	T	Buy	08/14/23	J		
19. - Sealed Air Corp	A	Dividend	J	T	Buy (add'l)	08/14/23	J		
20. - TJX Cos Inc	A	Dividend	K	T					
21. - Woodside Energy Group	A	Dividend	J	T					
22. Vanguard Target Ret Inc (See Part VIII)	B	Dividend	K	T					
23. PNC Bank Accounts	A	Interest	M	T					
24. Traditonal IRA (H)									
25. - Capital World Growth & Income Fund CLA	A	Dividend	J	T					
26. - Eaton Vance Mutual Funds Trust Gov't Oblig LC A	A	Dividend	J	T					
27. - Goldman Sachs Growth & Income Strategy Fund CL A	A	Dividend	J	T					
28. - Income Fund of America CL A	A	Dividend	J	T					
29. - Putnam Dynamic Asset- Allocation Growth Fund CL A	A	Dividend	J	T					
30. - Putnam Dynamic Asset Allocation Balanced Fund CL A	A	Dividend	J	T					
31. Investment Account #1 (H)									
32. - Virginia Comwlth Transn Brd	A	Interest	J	T					
33. - VA St Res Auth Wtr & Swr Rev	A	Interest	J	T					
34. - VA St Res Auth Wtr & Swr Sys	A	Interest	J	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
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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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35. - Virginia Beach VA GO Pub Impt	A	Interest	K	T					
36. - 3M Co	A	Dividend	J	T					
37. - Abbott Laboratories	A	Dividend	K	T					
38. - Abbvie Inc	B	Dividend	K	T					
39. - Becton Dickinson & Co	A	Dividend	J	T					
40. - Black Hills Corp	B	Dividend	K	T					
41. - Boeing Co		None	K	T					
42. - Caterpillar Inc	A	Dividend	K	T					
43. - ConocoPhillips	A	Dividend	J	T					
44. - Corteva Inc	A	Dividend	J	T					
45. - Dow Inc	A	Dividend	J	T					
46. - DuPont De Nemours Inc	A	Dividend	J	T					
47. - Fortis Inc	A	Dividend	K	T					
48. - Jacobs Solutions Inc	A	Dividend	K	T					
49. - Johnson & Johnson	A	Dividend			Sold	10/10/23	K	D	
50. - Kenvue Inc	A	Dividend	J	T	Spinoff (from line 49)	08/25/23	J		
51.					Buy (add'l)	10/10/23	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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52.	- Molson Coors Beverage Co	A	Dividend	J	T					
53.	- Mondelez International Inc	A	Dividend	K	T					
54.	- OGE Energy Corp	A	Dividend	K	T					
55.	- Parker Hannifin Corp	A	Dividend	K	T					
56.	- Phillips 66	B	Dividend	K	T					
57.	- PNC Bank Corp	A	Dividend	K	T					
58.	- Procter & Gamble Co	A	Dividend	K	T					
59.	- RTX Corp (formerly Raytheon Technologies Corp)	A	Dividend	J	T					
60.	- Sealed Air Corp	A	Dividend	J	T					
61.	- TJX Cos Inc	A	Dividend	L	T					
62.	- Vanguard FTSE All-Wrld Exus ETF	A	Dividend	J	T					
63.	Investment Account #2 (H)									
64.	Edward Jones Investment (Cash account)	A	Interest	J	T					
65.	- Ishares Russ 1000 Growth ETF	A	Dividend	K	T					
66.	- Ishares Russ 1000 Value ETF	A	Dividend	K	T					
67.	- Ishares Russ MC Value ETF	A	Dividend	K	T					
68.	- Ishares S&P 500 Growth ETF	A	Dividend	K	T	Sold (part)	11/27/23	J	A	

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
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69. - Vanguard High Div Yield ETF	C	Dividend	L	T	Sold (part)	12/27/23	J	A	
70. - Vanguard Mid Cap Growth ETF	A	Dividend	K	T					
71. - American Europacific Growth F3	B	Dividend	K	T					
72. - American New World Cl F3	A	Dividend	K	T	Sold (part)	01/25/23	J		
73.					Sold (part)	05/24/23	J		
74.					Sold (part)	06/27/23	J		
75.					Sold (part)	07/26/23	J	A	
76. - Bridge Builder Municipal Bond		None	M	T	Buy	12/04/23	M		
77. - Bridge Builder Muni Hgh-Inc Bd		None	L	T	Buy	12/04/23	L		
78. - Dimensional DFA Int'l Value Fund	B	Dividend	K	T	Sold (part)	09/27/23	J	A	
79. - Fidelity: Advisor Inter Mun Incm Fd Z	B	Dividend	L	T	Sold (part)	03/27/23	J		
80. - JP Morgan Fed Money Market	A	Dividend	J	T					
81. - MFS International Equity Fund	A	Dividend	K	T					
82. - MFS Municipal High Income R6	C	Dividend			Sold	11/30/23	L		
83. - T. Rowe Price Summit Municipal Income I	C	Dividend			Sold (part)	03/27/23	J		
84.					Sold	11/30/23	M		
85. - T. Rowe Price Tax Free Short Inter	B	Dividend	L	T	Sold (part)	10/25/23	J		

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86. Investment Account #3 (H)									
87. - PNC Bank NA Deposit Sweep	B	Dividend	K	T					
88. - Ishares National Muni Bond ETF	C	Dividend	M	T					
89. - Blackrock Core Bond Portfolio	B	Dividend	L	T	Buy	04/19/23	L		
90.					Buy (add'l)	07/20/23	K		
91. - Blackrock Strategic Income	B	Dividend	L	T	Buy (add'l)	01/19/23	K		
92. - Aristotle Floating Rate Inc (formerly Pacific Fds Floating Rate Inc)	B	Dividend			Sold	04/19/23	L		
93. - T. Rowe Price VA T/F Bond Fd	C	Dividend	M	T					
94. - Vanguard Funds Inter-Term TE Fd 542	D	Dividend	M	T					
95. - Vanguard Funds Limited Term Tax Exempt Fund 531 Admiral	C	Dividend	M	T					
96. -Fidelity Real Estate EFT	A	Dividend			Sold	04/19/23	J		
97. - Ishares S&P 100 ETF	A	Dividend	L	T					
98. - Ishares Core S&P US Value	A	Dividend	K	T					
99. - Ishares MSCI USA Quality Factor ETF	A	Dividend	K	T	Buy (add'l)	04/19/23	J		
100. - Ishares Core Dividend Growth ETF	B	Dividend	K	T	Buy (add'l)	09/29/23	J		
101. - Vanguard FTSE Developed Markets ETF	A	Dividend	J	T					
102. - Vanguard Mid Cap ETF	A	Dividend	K	T					

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103. - Vanguard Large Cap ETF	C	Dividend	M	T					
104. - Vanguard Growth ETF	A	Dividend	M	T					
105. - Vanguard Value ETF	B	Dividend	L	T					
106. - Seafarer Overseas Growth & Income Instl	A	Dividend	K	T					
107. - WCM Focused Int'l Growth	A	Dividend	K	T					
108. - Vanguard International Value Fund	A	Dividend	K	T					
109. Mineral Interest, Grady Cnty, OK		None	M	W					
110. Kansas City Whole Life Insurance	A	Interest	J	W					

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
Alito, Jr., Samuel A.	08/13/2024

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

Part VI, line 1. This loan was inadvertently omitted from certain prior reports. They are amended with the specified value codes as follows: 2022 (K), 2021 (K), 2020 (K), 2019 (K), 2018 (L), 2017 (L), 2016 (N), 2015 (N).

Part VII, line 22. This is part of the Duke University Retirement Plan. In July 2022, the managers of that Plan transitioned to the Vanguard Target Retirement Income fund from the substantially similar Vanguard Target Retirement Account 2015.

Name of Person Reporting	Date of Report
Alito, Jr., Samuel A.	08/13/2024

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/ Samuel A. Alito, 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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