AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

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
Bell, Kenneth D.	U.S. District Court, Western District of North Carolina	5/12/2025
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**
U.S. District Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
Charles R. Jonas Federal Building 401 W Trade St Suite 7200 Charlotte, NC 28202		

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. 2009	McGuireWoods LLC Retirement Plan with former law firm, managed, maintained, controlled and owned by former employer
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.		
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
Bell, Kenneth D.	5/12/2025

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. Bank of America - cash account	D	Interest	N	T					
2. Wells Fargo - cash account	C	Interest	J	T					
3. Kure Corp	A	Distribution	J	T					
4. AMV Holdings, LLC	A	Distribution	J	T					
5. Prudential AST T. Rowe Price Growth Opps Portfolio	E	Dividend	M	T					
6. Prudential AST Capital Growth Asset Allocation	E	Dividend	M	T					
7. Prudential Secure Value Account	A	Dividend	K	T					
8. Optum Bank Health Savings Account	A	Int./Div.	J	T					
9. HSA Bank Health Savings Account	A	Int./Div.	K	T	Distributed (part)	12/31/24	J		
10. Isodiol International, Inc.		None	J	T					
11. Carnegie Private Wealth IRA Strategic Asset Management I (H)									
12. - American Gen Life Ins Edge Income Bldr Fixed Annuity	D	Int./Div.	N	T					
13. Carnegie Private Wealth IRA Strategic Asset Management II (H)									
14. - JP Morgan Chase Bank Deposit Cash	A	Int./Div.	K	T					
15. - JP Morgan Liquid Assets Money Mkt Premier PJLXX	A	Int./Div.			Closed	02/21/24	L	A	
16.					Buy (add'l)	02/01/24	J		
17.					Buy (add'l)	01/02/24	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
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
Bell, Kenneth D.	5/12/2025

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)	
18. - First Trust Mornngstar Dividend Leaders Index ETF FDL	B	Int./Div.			Closed	02/21/24	M	D	
19. - First Trust Rising Dividend Achievers ETF RDVY	C	Int./Div.	M	T	Sold (part)	12/03/24	J	A	
20.					Sold (part)	02/21/24	K	A	
21. - First Trust CBOE Vest FD Buffer ETF BUFR		None			Closed	02/21/24	M	D	
22. - JP Morgan Equity TR ETF Premium Income Fund JEPIX	A	Int./Div.			Closed	02/21/24	L	A	
23.					Buy (add'l)	02/01/24	J		
24.					Buy (add'l)	01/02/24	J		
25.					Open	01/01/24	L		
26. - Vanguard International High Dividend Yield VYMI		None			Closed	02/21/24	L	B	
27. - Vanguard FTSE Emerging Markets ETF VWO		None			Closed	02/21/24	K	A	
28. - Vanguard Growth ETF VUG		None			Closed	02/21/24	L	B	
29. - Alger Growth Small Cap Focus AGOZX		None			Closed	02/21/24	K	A	
30. - Calamos Market Neutral Income Fund CMNIX		None			Closed	02/21/24	K	A	
31. - Delaware Group Global & Intl Fds DEMIX		None			Closed	02/21/24	K	C	
32. - Franklin Custodian FDS Income Ser Adv FRIAX	A	Int./Div.			Closed	02/21/24	K	A	
33.					Buy (add'l)	02/02/24	J		
34.					Buy (add'l)	01/04/24	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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	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. - IShares Edge MSCI ETF USA Quality Factor ETF QUAL	A	Int./Div.			Closed	02/21/24	M	D	
36. - IShares MSCI EAFE Growth ETF EFG		None			Closed	02/21/24	L	D	
37. - IShares 10+ Year Investment Grade Corp Bond ETF IGLB	A	Int./Div.			Closed	02/21/24	L	A	
38. - IShares Morningstar Mid Cap Growth ETF IMCG		None			Closed	02/21/24	K	C	
39. - IShares Morningstar Mid Cap Value ETF IMCV		None			Closed	02/21/24	K	C	
40. - Invesco S&P Small Cap ETF Value with Momentum XSVM		None			Closed	02/21/24	K	C	
41. - Invesco Equal Weight 0-30 Yr Treas ETF GOVI	A	Int./Div.			Closed	02/21/24	L	A	
42. - Technology Select Sector SPDR ETF XLK		None			Closed	02/21/24	L	B	
43. - First Trust Rising Dividend Achievers ETF RDVY	C	Int./Div.	M	T	Sold (part)	12/03/24	J	A	
44.					Sold (part)	02/21/24	K	A	
45.					Open	01/01/24	M		
46. - Aristotle Strategic Income Fund;I-2 PLSFX	C	Int./Div.	L	T	Buy (add'l)	12/03/24	J		
47.					Open	02/21/24	K		
48. - Avantis U.S. Small-Cap Value ETF AVUV	A	Int./Div.	K	T	Buy (add'l)	12/03/24	J		
49.					Open	09/13/24	K		
50. - iShares U.S. Equity Factor Rotation Active ETF DYNF	A	Int./Div.	L	T	Sold (part)	12/03/24	J	A	
51.					Open	04/18/24	L		

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52. - Dimensional U.S. Equity Market ETF DFUS	C	Int./Div.	N	T	Sold (part)	12/03/24	K	A	
53.					Open	04/18/24	N		
54. - Federated Hermes Adjustable Rate Fund;Inst FEUNX	D	Int./Div.	M	T	Buy (add'l)	12/03/24	J		
55.					Open	02/21/24	M		
56. - iShares Currency Hedged MSCI EAFE ETF HEFA	B	Int./Div.	L	T	Buy (add'l)	12/03/24	J		
57.					Open	02/21/24	L		
58. - Morgan Stanley Mortgage Securities Trust;I MTGDX	C	Int./Div.	M	T	Buy (add'l)	12/03/24	J		
59.					Open	02/21/24	L		
60. - Nationwide Amundi Strategic Income Fund;IS NWXHX	A	Int./Div.	K	T	Buy (add'l)	12/20/24	J		
61.					Buy (add'l)	12/03/24	J		
62.					Buy (add'l)	09/10/24	J		
63.					Buy (add'l)	06/11/24	J		
64.					Buy (add'l)	03/12/24	J		
65.					Open	02/21/24	J		
66. - Pacer U.S. Cash Cows 100 ETF COWZ	B	Int./Div.	L	T	Buy (add'l)	12/03/24	J		
67.					Open	02/21/24	L		
68. - Schwab U.S. Large -Cap Growth ETF SCHG	B	Int./Div.	N	T	Sold (part)	12/03/24	K	B	

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69.					Open	02/21/24	M		
70. - Thornburg Strategic Income Fund;I TSIIX	D	Int./Div.	M	T	Buy (add'l)	12/03/24	K		
71.					Buy (add'l)	12/02/24	J		
72.					Open	02/21/24	M		
73. - Touchstone Ares Credit Opportunities Fund;Y TMAYX	B	Int./Div.	K	T	Buy (add'l)	12/03/24	J		
74.					Buy (add'l)	10/31/24	J		
75.					Open	02/21/24	J		
76. - WisdomTree Emerging Markets High Dividend Fund DEM	C	Int./Div.	L	T	Buy (add'l)	12/03/24	J		
77.					Open	02/21/24	L		
78.									
79.									
80.									
81.									
82.									
83.									
84.									
85.									

1. Income Gain Codes: (See Columns B1 and D4)
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86.									
87.									

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

Name of Person Reporting	Date of Report
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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/ Kenneth D. Bell

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
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544