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
Davis, Brian J.	U. S. District Court, Middle District of Florida	09/04/2025
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**
Senior U. S. District Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
Bryan Simpson United States Courthouse 300 North Hogan Streete, Suite 11-400 Jacksonville, FL 32202		

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.	Trustee	The Community Foundation, Inc.
2.	Member, Advisory Board of Directors	North Florida Council, Boy Scouts of America, Inc.
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.	March 1982	State of FL Defined Benefit Pension Plan
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.	2024	State of Florida Retirement	$149,864.64
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.	2024	State of Florida Retirement
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.	Regions Bank	Mortgage on Investment Property, Jacksonville, FL	K
2.			
3.			
4.			
5.			

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Davis, Brian J.	09/04/2025

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. Citigroup Common Stock (X)	A	Dividend			Sold	09/06/24	J	A	
2. Travelers Common Stock (X)	A	Dividend			Sold	09/06/24	J	A	
3. Communty First Credit Union Accounts (X)	A	Interest	J	T					
4. Bank of America Account	A	Interest	L	T					
5. Regions Bank Accounts	A	Interest	L	T					
6. VyStar Credit Union Accounts (X)	A	Interest	L	T					
7. American Funds: American Mutual Fund	A	Dividend	J	T					
8. Northwestern Mutual Rollover IRA (H)									
9. Equity Income (MSA/T Rowe Price)	A	Dividend	J	T					
10. Focused Appreciation (MSA/Loomis Sayles)	A	Dividend	J	T					
11. Growth Stock (MSA/T Rowe Price)	A	Dividend	J	T					
12. US Small Cap Equity (RIF)	A	Dividend	J	T					
13. International Equity (MSA/Dodge Cox)	A	Dividend	J	T					
14. International Growth (MSA/FIAM LLC)	A	Dividend	J	T					
15. International Developed Markets (RIF)	A	Dividend	J	T					
16. Select Bond (MSA/Allspring Global Inv)	A	Dividend	J	T					
17. Strategic Bond (RIF)	A	Dividend	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
	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. High Yield Bond (MSA/Federated Inv.)	A	Dividend	J	T					
19. Global Real Estate Securities (RIF)	A	Dividend	J	T					
20. Guaranteed Interest Fund I	A	Dividend	J	T					
21. Investment Property, Jacksonville, FL (8/14/25 Appraisal $110,300)	D	Rent	M	Q					
22. Investment Property, Jacksonville, FL (8/14/25 Appraisal $113,000)		None	M	Q					
23. MetLife Variable Annuity Fixed Account	A	Int./Div.	L	T					
24. Northwestern Mutual Variable Annuity (H)									
25. Russell U. S. Mid-Cap	A	Dividend	J	T					
26. Vanguard Short Term Investment Grade A	A	Dividend	J	T					
27. The Oakmark International Fund Advisor Class	A	Dividend	J	T					
28. Real Estate Securities (I)	A	Dividend	J	T					
29. PIMCO Income I-2	A	Dividend	J	T					
30. Northern Small Cap Value Fund	A	Dividend	J	T					
31. MFS Value Fund-I	A	Dividend			Sold	06/24/24	J		Seller:Northwestern Mutual
32. New World Fund F2	A	Dividend	J	T					
33. FA Emerging Mkts - CL I	A	Dividend	J	T					
34. American Europacific Growth Fund F2	A	Dividend	J	T					

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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. Thornburg Income Builder Fund	A	Distribution	J	T					
36. Brokerage Money Market	A	Dividend	J	T					
37. Energizer Holdings	A	Dividend	J	T					
38. DWS Enhanced Commodity Strategy-Inst	A	Dividend	J	T					
39. Dodge & Cox Income Fund	A	Dividend	J	T					
40. Baron Asset Fund Institutional Class	A	Dividend			Sold	01/29/24	J		Seller:Northwestern Mutual
41. Short Duration Intl Protection Bond	A	Dividend	J	T					
42. IShares TR MSCI Int Vlu Ft	A	Dividend	J	T					
43. WA Core Bond CLI	A	Dividend			Sold	09/03/24	J		Seller:Northwestern Mutual
44. IShares TR ESG AWR US Agrgt	A	Dividend	M	T					
45. Diversified Macro I	A	Dividend	J	T					
46. Oakmark Internatoinal Fund Advisor Class	A	Dividend	J	T					
47. Blackrock Systemic Multi-Strategic Fund Institutional Class	A	Dividend	J	T					
48. Disciplined Value Mid Cap 1	A	Dividend	J	T					
49. Brokerage Money Market	A	Dividend	J	T					
50. AQR Diversitifed Arbitrage Fund Class I	A	Dividend	J	T					
51. Diversified Macro I	A	Dividend	J	T					

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52. NorthWest Mutual Whole Life Policy #1	A	Dividend	J	T					
53. NorthWest Mutual Whole Life Policy #2	A	Dividend	K	T					
54. NorthWest Mutual Whole Life Policy #3	C	Dividend	M	T					
55. American Funds Growth and Income Fund #1	A	Dividend	K	T					
56. American Funds Growth and Income Fund #2	A	Dividend	K	T					
57. American Funds Growth and Income Fund #3	A	Dividend	K	T					
58. Synovus - Guided Solutions Flex Account (H)									
59. Abbott Laboratories	A	Dividend	J	T					
60. Activation Blizzaard Inc.	A	Dividend	J	T					
61. Blackrock Inc. CI A	A	Dividend	J	T					
62. Berkshire Hathaway Inc CI B	A	Dividend	J	T					
63. Chevron Corp.	A	Int./Div.	J	T					
64. Coca-Cola Co.	A	Dividend	J	T					
65. Deere & Co.	A	Dividend	J	T					
66. Walt Disney Co.	A	Dividend	J	T					
67. IShares Russell 1000 Value ETF	A	Dividend	J	T					
68. IShares Russell 1000 Growth ETF	A	Dividend	J	T					

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69. IShares Core S&P 500 ETF	A	Dividend	J	T					
70. IShares MSCI EAFE ETF	A	Dividend	J	T					
71. JPMorgan Chase & Co.	A	Dividend	J	T					
72. Johnson & Johnson Com USD 1.00	A	Dividend	J	T					
73. Linde PLC	A	Dividend	J	T					
74. Lowes Companies Inc.	A	Dividend	J	T					
75. Molon Coors Beverage Co.	A	Dividend	J	T					
76. Medtronic PLC	A	Dividend	J	T					
77. McDonalds Corp.	A	Dividend	J	T					
78. Microsoft Corp.	A	Dividend	J	T					
79. Nvidia Corporation Com	A	Dividend	J	T					
80. Nextera Energy Inc.	A	Dividend	J	T					
81. Pepsico Inc.	A	Dividend	J	T					
82. Salesforce Com Inc.	A	Dividend	J	T					
83. Starbucks Corp.	A	Dividend	J	T					
84. Vanguard Mid Cap Index Fund	A	Dividend	J	T					
85. Vanguard Small Cap Index Fund	A	Dividend	J	T					

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86. Verizon Communications, Inc.	A	Dividend	J	T					
87. Visa Inc. CI A	A	Dividend	J	T					
88. Zoetis Inc.	A	Dividend	J	T					
89. Synovus - Traditional IRA (H)									
90. Vanguard Index Funds S&P 500 ETF	A	Dividend	J	T					
91. Vanguard Sht-Term Inflation-Protected SEC IDX	A	Dividend	J	T					
92. Vanguard Bd Index FDS Total Bnd Mrkt	A	Dividend	J	T					
93. Spdr Gold TR Gold SHS	A	Dividend	J	T					
94. PGIM High Yield CL R 6	A	Dividend	K	T					
95. PIMCO Income Fund	A	Dividend	J	T					
96. American New Wold Fund F3	A	Dividend	J	T					
97. JPMorgan Short Duration Bd Class R6	A	Dividend	K	T					
98. JPMorgan Growth Advantage CL R6	A	Dividend	J	T					
99. IShares Core S&P Small-Cap E	A	Dividend	K	T					
100. IShares Russell 1000 Value ETF	A	Dividend	J	T					
101. IShares Core S&P Mid-Cap	A	Dividend	K	T					
102. IShares MSCI EAFE ETF	A	Dividend	K	T					

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103. DFA Real Estate Sec PRTF Instl	A	Dividend	J	T					
104. Synovus [redacted] TIE - [redacted] (H)									
105. IShares MSCI EAFE ETF	A	Dividend	J	T					
106. IShares Core S&P Mid-Cap ETF	A	Dividend	J	T					
107. IShares Russell 1000 Value ETF	A	Dividend	K	T					
108. IShares Core S&P Small-Cap E	A	Dividend	J	T					
109. Vanguard Index Funds S&P 500 ETF	A	Dividend	K	T					
110. Vanguard Real Estate ETF	A	Dividend	J	T					
111. Vanguard Index FDS Vanguard Growth ETF formerly Vanguard Index TR Vipe	A	Dividend	J	T					
112. MFS Internatoinal Diversification CL 1	A	Dividend	J	T					
113. JPMorgan Grwth Adv Fund Class I	A	Dividend	K	T					
114. IShares MSCI EAFE ETF	A	Dividend	K	T					

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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		
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
Davis, Brian J.	09/04/2025

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

Name of Person Reporting	Date of Report
Davis, Brian J.	09/04/2025

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/ Brian J. Davis

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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