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
Dever, James C.	U.S District Court, EDNC	05/08/2025
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 - Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
U.S. District Court 310 New Bern Ave. Raleigh, NC 27601		

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.	Adjunct Law Professor	Campbell University, N.A. Wiggins School of Law
2.	Senior Lecturing Fellow	Duke University School of Law
3.	Board of Visitors	Duke University School of Law
4.	Board of Trustees	Belmont Abbey College
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.	2024	Agreement to teach as an adjunct law professor at Campbell University
2.	2024	Agreement to teach as a senior lecturing fellow at Duke University
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	Campbell University (wages)	$6,000.00
2.	2024	Duke University (wages)	$10,000.00
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	Teacher, Our Lady of Lourdes Catholic School, Raleigh, North Carolina (wages)
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
Dever, James C.	05/08/2025

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)	 (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	 (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (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. Northwestern Mutual Whole Life Policy	A	Interest	K	T					
2. Northwestern MutualWhole Life Policy	A	Interest	K	T					
3.									
4. PNC Bank Account	A	Interest	L	T					
5. IRA (H)									
6. -Cash Deposit -- Northwestern Mutual Investment Services	A	Interest	J	T					
7.									
8. -ABNFX (The Bond Fund of America Class F-2)	B	Interest			Sold	09/10/24	K	A	
9.									
10. -SMCFX (Small Cap World Fund Class F2)	D	Dividend	K	T					
11.									
12. -NFFFX (New World Fund Class F-2)	D	Dividend	K	T					
13.									
14. -CSDIX (Cohen & Steers Real Estate Securities Fund Class I)	A	Dividend			Sold	02/07/24	J	A	
15.									
16. -GIBIX (Guggenheim Total Return BondFund Institutional Class)	A	Dividend	K	T					
17.									

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		

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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18. -IJH (IShares TR Core S&P Mid-Cap ETF)	A	Dividend	K	T	Sold (part)	04/15/24	J	B	
19.									
20. -IJR (IShares TR Core S&P Small-Cap ETF)	D	Dividend	K	T					
21.									
22. -AGG (ISHARES TR CORE U.S. Aggregate BD ETF)	A	Dividend	K	T	Buy (add'l)	02/21/24	J		
23.					Buy (add'l)	04/17/24	J		
24.									
25. -SCHD (Schwab Strategic Trust Tips ETF)	B	Dividend			Sold	04/08/24	L	B	
26.									
27. -SCHF (Schwab Strategic TR Intl Equity ETF)	A	Dividend	J	T					
28.									
29. -DBLSX (DoubleLine Low Duration Bond Fund)	A	Dividend	J	T					
30.									
31. -IVV (ISHARES TR CORE S&P 500 ETF)	E	Dividend	M	T	Sold (part)	02/21/24	J	B	
32.					Sold (part)	07/12/24	J	B	
33.									
34. -IBTF (ISHARES TR IBONDS DEC 2025 TERM TREASURY 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
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Dever, James C.	05/08/2025

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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)	
35.									
36. -MBFIX (ALLSPRINGS CORE BOND FUND INSTITUTIONAL CLASS)	A	Dividend	K	T					
37.									
38. -CGGO (CAPITAL GROUP GLOBAL GROWTH EQUITY ETF SHS) CREATION UNIT)	D	Dividend	L	T					
39.									
40. -CREDX (BLACKROCK CREDIT STRATEGIES FUND INSTITUTIONAL CLASS)	A	Dividend	K	T					
41.									
42. -IBDW (ISHARES TR IBONDS DEC 2031 TERM CORPORATE)	A	Dividend	J	T					
43.									
44. -SBGP (INVESCO EXCHANGE TRADED FD TR S&P 500 ETF)	C	Dividend	K	T					
45.									
46. -GRPM (INVESCO EXCHANGE TRADED FD TR S&P 500 GARP ETF)	D	Dividend	K	T					
47.									
48. -CPREX (Clarion Partners Real Estate Income Fund Class I)	A	Dividend	J	T	Buy	02/07/24	J		
49.									
50. -CGCB (Capital Group Fixed Income ETF TR Core BD ETF)	A	Dividend	K	T	Buy	09/10/24	K		

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51.									
52. -TLT (ISHARES TR 20+ YR TREAS BD ETF)	A	Dividend	J	T	Buy	07/12/24	J		
53.									
54. -IUSV (ISHARES TR CORE S&P US VALUE ETF)	B	Dividend	L	T	Buy	04/08/24	K		
55.									
56. Roman Catholic Diocese of Raleigh 403(b) Ret Plan (H)									
57. -T Rowe Retirement I 2030 Fund	A	Dividend	K	T					
58.									
59. Duke Faculty and Staff 403(b) Ret Plan (H)									
60. -Vanguard Institution Target Retirement 2025 mutual fund 2025	A	Dividend	K	T					
61.									
62. Trust (H)									
63. -Wachovia (now Wells Fargo) checking account	A	Interest	J	T					
64. -Wachovia (now Wells Fargo) savings account	A	Interest	K	T					
65. -Kinecta Federal Savings & Loan checking account	A	Interest	L	T					
66. -Kinecta Federal Savings & Loan savings account	A	Interest	J	T					
67. -Kinecta Federal Savings & Loan Certificate of Deposit	A	Interest	M	T					

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68. -New York Life whole life insurance policy	B	Interest	K	T					
69. -New York Life family whole life insurance policy	A	Interest	J	T					
70. -New York Life variable annuity (H)									
71. Mainstay VP Janus Henderson Balanced Initial Class 159	A	Dividend	K	T					
72. -USAA whole life insurance policy	A	Interest	L	T					
73.									
74. -Comcast Corp CL A stock	A	Dividend	K	T					
75. -Northrop Grumman Corp stock	D	Dividend	N	T					
76. -Raytheon Technologies Corporation stock	E	Dividend	P1	T					
77. -3M Company stock	B	Dividend	L	T					
78. -Solventum Corporation	A	Dividend	J	T	Spinoff (from line 77)	04/01/24	J		
79. -Wells Fargo checking	A	Interest	J	T					
80. -Fidelity US Treasury Money Mkt	A	Interest	K	T					
81. -Huntington Ingall Indus stock	A	Dividend	K	T					
82. -Chevron Corp stock	D	Dividend	N	T					
83.									
84. Fidelity Portfolio Advisory Service(H)									

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85. -FDLXX (Fidelity Treasury Only Money Market)	C	Dividend	L	T					
86. -FDRXX (Fidelity Government Cash Reserves)	C	Dividend	L	T					
87.									
88. -FALCX (Strategic Advisors Large Cap Fund)	D	Dividend			Merged (with line 90)	08/16/24	M		
89.									
90. -FSAKX (Strategic Advisers U.S. Total Stock FD)	D	Dividend	N	T	Buy (add'l)	08/21/24	K		
91.					Sold (part)	09/10/24	K		
92.					Sold (part)	10/15/24	K		
93.					Sold (part)	11/15/24	K		
94.					Sold (part)	11/29/24	K		
95.					Sold (part)	11/19/24	K		
96.									
97. -FEMKX (Fidelity Emerging Markets)	A	Dividend	J	T					
98.									
99. -FGNSX (Strategic Adv Tax Sensitive Sho)	B	Dividend	K	T	Buy (add'l)	08/21/24	J		
100.					Sold (part)	10/15/24	J	A	
101.					Buy (add'l)	11/29/24	J		

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102.					Buy (add'l)	12/16/24	J		
103.									
104. -FILFX (Strategic Advisors International)	C	Dividend	M	T	Sold (part)	08/21/24	J	A	
105.					Sold (part)	09/10/24	J	A	
106.					Buy (add'l)	09/11/24	J		
107.					Sold (part)	10/15/24	J	A	
108.					Buy (add'l)	11/15/24	J		
109.					Sold (part)	12/19/24	J	A	
110.									
111. -FSCJXX (Fidelity SAI Canada Equity Index Fund)	A	Dividend	J	T	Buy	09/11/24	J		
112.					Buy (add'l)	10/15/24	J		
113.					Buy (add'l)	11/15/24	J		
114.					Buy (add'l)	11/29/24	J		
115.									
116. -FSUVX (FID SAI US Low Volitility Index FD)	A	Dividend	J	T	Buy	08/21/24	J		
117.					Sold (part)	09/10/24	J	A	
118.					Buy (add'l)	09/11/24	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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	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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Name of Person Reporting	Date of Report
Dever, James C.	05/08/2025

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)	
119.					Sold (part)	10/15/24	J	A	
120.					Buy (add'l)	09/19/24	J		
121.									
122. -CSRCX (Cohen & Steers Realty Shares)	B	Dividend	K	T	Buy	06/18/24	J		
123.					Buy (add'l)	09/10/24	J		
124.					Buy (add'l)	09/11/24	J		
125.									
126. -FSPWX (FID SAI Inflation Protected Bond Index)	B	Dividend	K	T	Buy	09/10/24	J		
127.					Buy (add'l)	09/11/24	J		
128.					Buy (add'l)	10/15/24	K		
129.					Buy (add'l)	11/15/24	J		
130.					Buy (add'l)	11/29/24	J		
131.					Sold (part)	12/19/24	J	A	
132.									
133. -FSAMX (Strategic Advisors International)	C	Dividend	L	T	Sold (part)	08/21/24	J	A	
134.					Sold (part)	09/10/24	J	A	
135.					Buy (add'l)	09/11/24	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
Dever, James C.	05/08/2025

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)	
136.					Buy (add'l)	10/08/24	J		
137.					Buy (add'l)	10/15/24	J		
138.					Buy (add'l)	11/29/24	J		
139.					Sold (part)	12/19/24	J	A	
140.									
141. --FSCFX (Strategic Advisors Small Mid-Cap)	C	Dividend			Merged (with line 90)	08/16/24	M		
142.									
143. -FSMUX (SAI Municipal Bond Fund)	A	Dividend	L	T	Buy (add'l)	11/29/24	J		
144.									
145. -FVDFX (Fidelity Value Discovery)	A	Dividend	J	T					
146.									
147. -IJR (Ishares Core S&P Small Cap)	A	Dividend	J	T	Sold (part)	08/21/24	J	A	
148.					Buy (add'l)	11/29/24	J		
149.									
150. -IWD (Ishares Russell 1000 Value)	A	Dividend	K	T					
151.									
152. -OAKIX (Oakmark Intl Investors)	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
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Name of Person Reporting	Date of Report
Dever, James C.	05/08/2025

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)	
153.									
154. -VOE (Vanguard Mid Cap Value Index Fund)	A	Dividend	J	T					
155.									
156. -FIFGX (Fidelity SAI Inflation Focused FD)	A	Dividend	J	T	Sold (part)	09/10/24	J	A	
157.					Buy (add'l)	09/11/24	J		
158.					Sold (part)	10/15/24	J	A	
159.					Buy (add'l)	11/29/24	J		
160.									
161. -FSLTX (Strategic Advisers Alternatives Fund)	A	Dividend	K	T	Buy (add'l)	12/19/24	K		
162.									
163. -FAUDX (Strategic Advisers Short Duration Fund)	A	Dividend	K	T	Sold (part)	08/21/24	J	A	
164.					Sold (part)	09/10/24	J	A	
165.					Buy (add'l)	09/11/24	J		
166.					Buy (add'l)	10/15/24	K		
167.					Sold (part)	11/05/24	J	A	
168.					Sold (part)	12/19/24	K	A	
169.									

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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Name of Person Reporting	Date of Report
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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) 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)	
170. -FPIOX (Strategic Advisers Income Opporunites)	A	Dividend	J	T	Buy (add'l)	12/19/24	J		
171.									
172. -FPCIX (Strategic Advisers Core Income Fund)	D	Dividend	N	T	Buy (add'l)	08/21/24	K		
173.					Sold (part)	09/10/24	K	A	
174.					Buy (add'l)	09/11/24	K		
175.					Buy (add'l)	10/15/24	J		
176.					Buy (add'l)	11/15/24	J		
177.					Buy (add'l)	11/29/24	K		
178.					Sold (part)	12/19/24	K	A	
179.									
180. -BSGPX (Baillie Gifford Devl EAFE All Cap Instl)	A	Dividend			Sold	10/15/24	J	A	
181.									
182. -SEMVX (Hartford Schroders Emrg Mrkts eqty SDR)	A	Dividend	J	T					
183.									
184. -MGIAX (MFS International Intrinsic Value Cl A)	A	Dividend			Sold	12/19/24	J	A	
185.									
186. -MFAPX (Morgan Stanley Intl Advantage Cl A)	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
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187.									
188. -IWP (Ishares Tr Rus Md Cp Gr ETF)	A	Dividend	J	T	Sold (part)	08/21/24	J	A	
189.									
190. -MISIX (Victory Trivalent Intl Small Cap)	A	Dividend	J	T					
191.									
192. -VUG (Vanguard Index FDS Vanguard Growth)	A	Dividend	K	T					
193.									
194. -GOVT (Ishares Tr US Treas Bd ETF)	A	Dividend			Sold	10/15/24	J	A	
195.									
196. -FBLTX (FID SAI Long Term Treasury Bond Index)	A	Dividend			Sold	08/16/24	J	A	
197.									
198. -FBGRX (Fidelity Blue Chip Growth)	A	Dividend	J	T					
199.									
200. -FISZX (Fidelity SAI Intl SMA Completion FD)	A	Dividend	J	T	Buy	11/29/24	J		
201.									
202. --FSKLX (Fid SAI Intnl Low Volitility Index FD)	A	Dividend	J	T	Buy	10/15/24	J		
203.									

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204.									
205. -Carrier Global Corp. stock	A	Dividend	K	T					
206. -Otis Worldwide Corp. stock	A	Dividend	J	T					
207.									
208. -Johnson and Johnson stock	A	Dividend	L	T					
209. -News Corp Class A stock	A	Dividend	J	T					
210. -Morgan Stanley & Co. stock	C	Dividend	M	T					
211.									
212. -Disney Walt Company stock	A	Dividend	K	T					
213. -Fox Corp Class A stock	A	Dividend	J	T					
214. -Denton Cnty TX Fresh Water Supply Bond	A	Interest	K	T					
215. -California St Various Purp G/O Unltd Bond	A	Interest	K	T					
216. -California St RFDG Var Purp G/O Unlt Bond	A	Interest	K	T					
217. -Pasadena CA Area Cmnty CLLG Dist RFDG Bond	A	Interest	K	T					
218. -Portland OR SWR Sys Rev RFDG Bond	A	Interest	K	T					
219. -Microsoft Corp stock	A	Dividend	L	T					
220.									

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

1. With respect to lines 1, 2, 68, 69, and 72, these are paid up whole life insurance policies. According to my insurance agent, there are no underlying investments for these paid up whole life policies.

2. With respect to lines 70 and 71, the asset listed on line 70 is a New York Life variable annuity. The asset allocation is 100% in Mainstay VP Janus Henderson Balanced - Initial Class - 159 as referenced on line 71.

Name of Person Reporting	Date of Report
Dever, James C.	05/08/2025

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/ James C. Dever

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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One Columbus Circle, N.E.
Washington, D.C. 20544