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
Duncan, Stuart K.	U.S. Court of Appeals for the Fifth Circuit	04/02/2025
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. Circuit Judge (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
600 S. Maestri Pl. New Orleans, LA 70130		

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 Faculty	Regent University School of Law
2.	Jurist in Residence	Catholic University Columbus School of Law
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.		
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	Regent University School of Law (teaching income)	$6,000.00
2.	2024	Catholic University Columbus School of Law (Jurist in Residence/ teaching income)	$3,000.00
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.		
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.	Catholic University Law School	2/22/2024 - 2/23/2024	Washington, DC	Jurist in Residence, Writing Conference	Transportation, food
2.	Princeton University	3/19/2024 - 3/20/2024	Princeton, NJ	Conference Panelist	Transportation, food, lodging
3.	Regents Law School	4/8/2024 - 4/12/2024	Virginia Beach, VA	Teaching	Transportation, food, lodging
4.	Federalist Society	6/20/2024	Washington, DC	Conference	Transportation
5.	Federalist Society, Hillsdale Chapter	10/2/2024 - 10/3/2024	Hillsdale, MI	Panelist	Transportation, food, lodging

6.	Federalist Society	11/14/2024 - 11/16/2024	Washington, DC	Conference Moderator	Transportation, food, lodging

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
Duncan, Stuart K.	04/02/2025

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.	Individual Assets (H)									
2.	Campus Federal Credit Union (cash) (X)	A	Interest	J	T					
3.	Account #1 (H)									
4.	T. Rowe Price US Equity Research (TSPA)	A	Dividend	L	T	Buy	09/25/24	L		
5.	Goldman Sachs Access Treasury 0-1 Year ETF (GBIL)	A	Dividend			Sold	08/05/24	K		
6.	AB Small Cap Growth Portfolio Advisor Class (QUAYX)		None	J	T					
7.	Allspring Core Plus Bond Fund Class Institutional (WIPIX)	A	Dividend	J	T					
8.	American Funds Strategic Bond Fund Class F-2 (ANBFX)	A	Dividend	J	T					
9.	AQR Long-Short Equity Fund Class I (QLEIX)	A	Dividend	J	T					
10.	Brown Advisory Sustainable Growth Fund Inv (BIAWX)	C	Dividend	L	T	Buy (add'l)	08/05/24	J		
11.						Sold (part)	09/25/24	K	C	
12.	Cohen & Steers Real Estate Securities Fund (CSDIX)	A	Dividend	J	T					
13.	Cohen & Steers Realty Shares Fund Class L (CSRSX)	A	Dividend	J	T					
14.	FullerThaler Behavioral Small-Cap Equity Fund (FTHSX)	A	Dividend	J	T					
15.	John Hancock Bond Fund Class I (JHBIX)	A	Dividend	J	T					
16.	John Hancock Funds Disciplined Value Mid Cap Fund Class I (JVMIX)	A	Dividend	J	T					
17.	John Hancock Funds International Growth Fund Class I (GOGIX)	A	Dividend	K	T	Buy (add'l)	08/05/24	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
Duncan, Stuart K.	04/02/2025

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.	Macquarie Large Cap Growth (IYGIX) (was Delaware)	B	Dividend	L	T	Buy (add'l)	08/05/24	J		
19.						Sold (part)	09/25/24	K	C	
20.	MFS International Equity I (MIEKX)	A	Dividend	K	T	Buy (add'l)	08/05/24	J		
21.	MFS Limited Maturity I (MQLIX)		None	J	T	Buy	12/04/24	J		
22.	MFS Mid Cap Value Fund Class I (MCVIX)	A	Dividend	J	T					
23.	MFS New Discovery Value Fund Class I (NDVIX)	A	Dividend	J	T					
24.	MFS Total Return Bd I (MRBIX)		None	J	T	Buy	12/04/24	J		
25.	MFS Value Fund Class I (MEIIX)	D	Dividend	L	T	Buy (add'l)	08/05/24	J		
26.						Sold (part)	09/25/24	K	B	
27.	PIMCO Income Fund Class I-2 (PONPX)	A	Dividend	J	T					
28.	PIMCO Mortgage Opportunities and Bond Fund Class I-2 (PMZPX)	A	Dividend			Sold	12/04/24	J		
29.	Principal Global Real Estate Securities Fund Instl Class (POSIX)	A	Dividend	J	T					
30.	Principal MidCap Fund Institutional Class (PCBIX)	A	Dividend	K	T					
31.	T. Rowe Price Integrated U.S. Small-Cap Growth Equity Fund (PRDSX)	A	Dividend	J	T					
32.	T. Rowe Price Small-Cap Value Fund (PRSVX)	A	Dividend	J	T					
33.	T. Rowe Price Value Fund (TRVLX)	D	Dividend	L	T	Buy (add'l)	08/05/24	J		
34.						Sold (part)	09/25/24	K	B	

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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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. TCW MetWest Total Return Bond Fund Class I (MWTIX)	A	Dividend			Sold	12/04/24	J		
36. Account #2 (H)									
37. T. Rowe Price US Equity Research (TSPA)	A	Dividend	K	T	Buy	09/25/24	K		
38. Goldman Sachs Access Treasury 0-1 Year ETF (GBIL)	A	Dividend			Sold	08/05/24	J		
39. AB Small Cap Growth Portfolio Advisor Class (QUAYX)		None	J	T					
40. Allspring Core Plus Bond Fund Class Institutional (WIPIX)	A	Dividend	J	T					
41. Brown Advisory Sustainable Growth Fund Inv (BIAWX)	B	Dividend	K	T	Buy (add'l)	08/05/24	J		
42.					Sold (part)	09/25/24	J	B	
43. Cohen & Steers Real Estate Securities Fund (CSDIX)	A	Dividend	J	T					
44. Cohen & Steers Realty Shs Inc (CSRSX) (X)	A	Dividend	J	T					
45. FullerThaler Behavioral Small-Cap Equity Fund (FTHSX)	A	Dividend	J	T					
46. John Hancock Funds Disciplined Value Mid Cap Fund Class I (JVMIX)	A	Dividend	J	T					
47. John Hancock Funds International Growth Fund Class I (GOGIX)	A	Dividend	J	T					
48. Macquarie Ivy Large Cap Growth (IYGIX) (was Delaware)	A	Dividend	K	T	Buy (add'l)	08/05/24	J		
49.					Sold (part)	09/25/24	J	B	
50. MFS International Equity I (MIEKX)	A	Dividend	J	T					
51. MFS International Intrinsic Value Fund Class I (MINIX)	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
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52.	MFS Mid Cap Value Fund Class I (MCVIX)	A	Dividend	J	T					
53.	MFS New Discovery Value Fund Class I (NDVIX)	A	Dividend	J	T					
54.	MFS Total Return Bd I (MRBIX)		None	J	T	Buy	12/04/24	J		
55.	MFS Value Fund Class I (MEIIX)	B	Dividend	K	T	Buy (add'l)	08/05/24	J		
56.						Sold (part)	09/25/24	J	A	
57.	PIMCO Income Fund Class I-2 (PONPX)	A	Dividend	J	T					
58.	Principal Global Real Estate Securities Fund Instl Class (POSIX)	A	Dividend	J	T					
59.	Principal MidCap Fund Institutional Class (PCBIX)	A	Dividend	J	T					
60.	T. Rowe Price Int Sm Cap U.S. Small-Cap Growth Equity Fund (PRDSX)	A	Dividend	J	T					
61.	T. Rowe Price Value Fund (TRVLX)	B	Dividend	K	T	Buy (add'l)	08/05/24	J		
62.						Sold (part)	09/25/24	J	A	
63.	TCW MetWest Total Return Bond Fund Class I (MWTIX)	A	Dividend			Sold	12/04/24	J		
64.	Account #3 (H)									
65.	T. Rowe Price US Equity Research (TSPA)		None	J	T	Buy	09/25/24	J		
66.	Goldman Sachs Access Treasury 0-1 Year ETF (GBIL)	A	Dividend			Sold	08/05/24	J		
67.	AB Small Cap Growth Portfolio Advisor Class (QUAYX)		None	J	T					
68.	Allspring Core Plus Bond Fund Class Institutional (WIPIX)	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	
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69.	Brown Advisory Sustainable Growth Fund Inv (BIAWX)	A	Dividend	J	T	Sold (part)	09/25/24	J	A	
70.	Cohen & Steers Real Estate Securities Fund, Inc. Class Instl (CSDIX)	A	Dividend	J	T					
71.	John Hancock Funds Disciplined Value Mid Cap Fund Class I (JVMIX)	A	Dividend	J	T					
72.	John Hancock Funds International Growth Fund Class I (GOGIX)	A	Dividend	J	T					
73.	Macquarie Ivy Large Cap Growth (IYGIX) (was Delaware)	A	Dividend	J	T	Sold (part)	09/25/24	J	A	
74.	MFS International Equity I (MIEKX)	A	Dividend	J	T					
75.	MFS Mid Cap Value Fund Class I (MCVIX)	A	Dividend	J	T					
76.	MFS New Discovery Value Fund Class I (NDVIX)	A	Dividend	J	T					
77.	MFS Total Return Bd I (MRBIX)		None	J	T	Buy	12/04/24	J		
78.	MFS Value Fund Class I (MEIIX)	A	Dividend	J	T	Sold (part)	09/25/24	J	A	
79.	Principal Global Real Estate Securities Fund Instl Class (POSIX)	A	Dividend	J	T					
80.	Principal MidCap Fund Institutional Class (PCBIX)	A	Dividend	J	T					
81.	T. Rowe Price Integrated U.S. Small-Cap Growth Equity Fund (PRDSX)	A	Dividend	J	T					
82.	T. Rowe Price Value Fund (TRVLX)	A	Dividend	J	T	Sold (part)	09/25/24	J	A	
83.	TCW MetWest Total Return Bond Fund Class I (MWTIX)	A	Dividend			Sold	12/04/24	J		
84.	Account #4 (H)									
85.	T. Rowe Price US Equity Research (TSPA)	A	Dividend	K	T	Buy	09/25/24	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

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86. Goldman Sachs Access Treasury 0-1 Year ETF (GBIL)	A	Dividend			Sold	08/05/24	J		
87. AB Small Cap Growth Portfolio Advisor Class (QUAYX)		None	J	T					
88. Allspring Core Plus Bond Fund Class Institutional (WIPIX)	A	Dividend	J	T					
89. Brown Advisory Sustainable Growth Fund Inv (BIAWX)	A	Dividend	K	T	Sold (part)	09/25/24	J	A	
90. Cohen & Steers Real Estate Securities Fund, Inc. Class Instl (CSDIX)	A	Dividend	J	T					
91. FullerThaler Behavioral Small-Cap Equity Fund (FTHSX)	A	Dividend	J	T					
92. John Hancock Funds Disciplined Value Mid Cap Fund Class I (JVMIX)	A	Dividend	J	T					
93. John Hancock Funds International Growth Fund Class I (GOGIX)	A	Dividend	J	T					
94. Macquarie Ivy Large Cap Growth (IYGIX) (was Delaware)	A	Dividend	K	T	Sold (part)	09/25/24	J	A	
95. MFS International Equity I (MIEKX)	A	Dividend	J	T					
96. MFS Mid Cap Value Fund Class I (MCVIX)	A	Dividend	J	T					
97. MFS New Discovery Value Fund Class I (NDVIX)	A	Dividend	J	T					
98. MFS Total Return Bd I (MRBIX)		None	J	T	Buy	12/04/24	J		
99. MFS Value Fund Class I (MEIIX)	B	Dividend	J	T	Sold (part)	09/25/24	J	A	
100. Pimco Income I2 (PONPX) (X) (Y)									
101. Principal Global Real Estate Securities Fund Instl Class (POSIX)	A	Dividend	J	T					
102. Principal MidCap Fund Institutional Class (PCBIX)	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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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)	
103. T. Rowe Price Integrated U.S. Small-Cap Growth Equity Fund (PRDSX)	A	Dividend	J	T					
104. T. Rowe Price Value Fund (TRVLX)	B	Dividend	J	T	Sold (part)	09/25/24	J	A	
105. TCW MetWest Total Return Bond Fund Class I (MWTIX)	A	Dividend			Sold	12/04/24	J		
106. Account #5 (H)									
107. Alger Spectra Fund C (ASPCX) (X)	A	Dividend	J	T					
108. MFS Value Fund C (MEICX) (X)	A	Dividend	J	T					
109. Account #6 (H)									
110. MSILF Government PTF Inst Money Market Fund (MVRXX) (cash eq.) (X)	E	Dividend	O	T	Sold (part)	01/09/24	J		
111.					Sold (part)	02/13/24	J		
112.					Sold (part)	02/21/24	J		
113.					Buy (add'l)	02/28/24	K		
114.					Sold (part)	03/12/24	J		
115.					Sold (part)	04/08/24	K		
116.					Sold (part)	04/09/24	J		
117.					Sold (part)	05/07/24	J		
118.					Sold (part)	05/23/24	K		
119.					Sold (part)	05/24/24	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

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)	
120.					Sold (part)	07/16/24	J		
121.					Sold (part)	07/22/24	M		
122.					Sold (part)	08/06/24	K		
123.					Buy (add'l)	08/08/24	K		
124.					Buy (add'l)	08/21/24	K		
125.					Sold (part)	09/10/24	J		
126.					Sold (part)	10/11/24	J		
127.					Sold (part)	12/13/24	J		
128.	Blue Owl Credit Inc Corp	C	Dividend	M	T	Buy	08/23/24	M		
129.	Account #7 (H)									
130.	Morgan Stanley Bank (cash) (X)	A	Interest	J	T					
131.	Goldman Sachs Access Treasury 0-1 Year ETF (GBIL)	A	Dividend			Sold	08/05/24	J		
132.	T. Rowe Price US Equity Research (TSPA)	A	Dividend	K	T	Buy	09/25/24	K		
133.	Vanguard Total Bond Market (BND) (X)	A	Dividend	J	T					
134.	AB Small Cap Growth Portfolio Advisor Class (QUAYX)		None	J	T					
135.	Allspring Core Plus Bond Fund Class Institutional (WIPIX)	B	Dividend	K	T	Buy	01/09/24	K		
136.	American Multi Sector Inc F2 (MIAYX)	A	Dividend			Sold	02/02/24	K	A	

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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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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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)	
137. American Funds Strategic Bond Fund Class F-2 (ANBFX)	A	Dividend	K	T					
138. Brown Advisory Sustainable Growth Fund Inv (BIAWX)	B	Dividend	K	T	Buy (add'l)	08/05/24	J		
139.					Sold (part)	09/25/24	J	B	
140. Cohen & Steers Real Estate Securities Fund (CSDIX)	A	Dividend	J	T					
141. Cohen & Steers Realty Shares Fund Class L (CSRSX)	A	Dividend	J	T					
142. FullerThaler Behavioral Small-Cap Equity Fund (FTHSX)	A	Dividend	J	T					
143. John Hancock Bond Fund Class I (JHBIX)	B	Dividend	K	T					
144. John Hancock Funds Disciplined Value Mid Cap Fund Class I (JVMIX)	A	Dividend	J	T					
145. John Hancock Funds International Growth Fund Class I (GOGIX)	A	Dividend	K	T					
146. John Hancock Inv Grade Bond I (TIUSX)	A	Dividend	J	T	Buy	12/04/24	J		
147. Lord Abbett Core Plus Bond I (LAPIX)		None	J	T	Buy	12/06/24	J		
148. Lord Abbett Income I (LAUYX)		None	J	T	Buy	12/09/24	J		
149. Lord Abbett Short Duration Inc (LLDYX)	A	Dividend			Sold	02/02/24	K	A	
150. Mainstay Mackay Strat Bd I (MSDIX)	A	Dividend			Sold	02/02/24	K	A	
151. Macquarie Ivy Large Cap Growth (IYGIX) (was Delaware)	A	Dividend	K	T	Buy (add'l)	08/05/24	J		
152.					Sold (part)	09/25/24	J	B	
153. MFS International Equity I (MIEKX)	A	Dividend	K	T					

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154. MFS Limited Maturity I (MQLIX)		None	K	T	Buy	12/04/24	K		
155. MFS Mid Cap Value Fund Class I (MCVIX)	A	Dividend	J	T					
156. MFS New Discovery Value Fund Class I (NDVIX)	A	Dividend	J	T					
157. MFS Total Return Bd I (MRBIX)	A	Dividend	K	T	Sold	01/09/24	K	A	
158.					Buy	12/04/24	K		
159. MFS Value Fund Class I (MEIIX)	C	Dividend	K	T	Buy (add'l)	08/05/24	J		
160.					Sold (part)	09/25/24	J	B	
161. Pimco GNMA & Gov Securities I2 (PPGNX)	A	Dividend			Buy	02/02/24	J		
162.					Sold	12/06/24	J	A	
163. Pimco Income I2 (PONPX)	B	Dividend	K	T	Buy	02/02/24	K		
164. Pimco Intl Bond USD Hedged I2 (PFBPX)	A	Dividend	K	T	Buy	02/02/24	K		
165. Pimco Mortgage Opp & Bd I2 (PMZPX)	B	Dividend			Buy	02/02/24	K		
166.					Sold	12/04/24	K		
167. Pimco Short Term I2 (PTSPX) (X)	A	Dividend	J	T					
168. Principal Global Real Estate Securities Fund Instl Class (POSIX)	A	Dividend	J	T					
169. Principal MidCap Fund Institutional Class (PCBIX)	A	Dividend	J	T					
170. T. Rowe Price Integrated U.S. Small-Cap Growth Equity Fund (PRDSX)	A	Dividend	J	T					

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171. T Rowe Price Sm Cap Value (PRSVX) (X)	A	Dividend	J	T					
172. T. Rowe Price Value Fund (TRVLX)	C	Dividend	K	T	Buy (add'l)	08/05/24	J		
173.					Sold (part)	09/25/24	J	B	
174. TCW Emerging Markets Income I (TGEIX)	A	Dividend			Sold	12/09/24	J		
175. TCW MetWest Total Return Bond Fund Class I (MWTIX)	B	Dividend			Buy	01/09/24	K		
176.					Sold	12/04/24	K		
177. TCW Metropolitan West Unconstrained Bond I (MWCIX)	A	Dividend			Sold	12/04/24	J		
178. Lord Abbett Core Fixed Inc I (LCRYX)	A	Dividend			Sold	01/09/24	K	A	
179. Account #8 (H)									
180. American Funds AMCAP Fund Class 529-A (CAFAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
181.					Sold (part)	08/06/24	J	B	
182.					Sold (part)	12/13/24	J	A	
183. American Funds Capital World Growth and Income Fund Cl 529-A (CWIAX)	A	Dividend			Sold (part)	08/06/24	J	A	
184.					Sold	12/13/24	J	A	
185. American Funds EuroPacific Growth Fund Class 529-A (CEUAX)	A	Dividend			Sold (part)	08/06/24	J		
186.					Sold	12/13/24	J		
187. American Funds The Growth Fund of America Class 529-A (CGFAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	

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188.					Sold (part)	08/06/24	J	B	
189.					Sold (part)	12/13/24	J	B	
190. American Funds Investment Company of America Class 529-A (CICAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
191.					Sold (part)	08/06/24	J	B	
192.					Sold (part)	12/13/24	J	B	
193. American Funds New Perspective Fund Class 529-A (CNPAX)	A	Dividend			Sold (part)	02/27/24	J	A	
194.					Sold (part)	08/06/24	J	A	
195.					Sold	12/13/24	J	A	
196. Account #9 (H)									
197. American Funds AMCAP Fund Class 529-A (CAFAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
198. American Funds The Growth Fund of America Class 529-A (CGFAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
199. American Funds Investment Company of America Class 529-A (CICAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
200. American Funds New Perspective Fund Class 529-A (CNPAX)	A	Dividend			Sold	02/27/24	J	A	
201. Account #10 (H)									
202. American Funds U.S. Govt Money Market Fd 529-A (AAFXX) (cash eq.)	A	Dividend			Sold	07/17/24	J		
203. American Funds AMCAP Fund Class 529-A (CAFAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
204.					Sold (part)	07/17/24	J	A	

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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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205. American Funds Capital World Growth and Income Fund Cl 529-A (CWIAX)	A	Dividend	J	T					
206. American Funds The Growth Fund of America Class 529-A (CGFAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
207.					Sold (part)	07/17/24	J	A	
208. American Funds Investment Company of America Class 529-A (CICAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
209.					Sold (part)	07/17/24	J	A	
210. American Funds New Perspective Fund Class 529-A (CNPAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
211.					Sold (part)	07/17/24	J	A	
212. Account #11 (H)									
213. American Funds AMCAP Fund Class 529-A (CAFAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
214. American Funds The Growth Fund of America Class 529-A (CGFAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
215. American Funds Investment Company of America Class 529-A (CICAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
216. American Funds New Perspective Fund Class 529-A (CNPAX)	A	Dividend	J	T	Sold (part)	02/27/24	J	A	
217. American Funds EuroPacific Growth Fund (CEUAX) (Y)									
218. AQR Style Premia Alternative Fund Class I (QSPIX) (Y)									
219. MFS International Diversification Fund Class I (MDIJX) (Y)									
220. ProShares VIX Mid-Term Futures ETF (Y)									

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.)*

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value.

For ease of future reporting, Part VII of this report has been reorganized by account. As a result, more than one entry in Part VII may correspond with a single entry in the prior report. This is not indicative of reportable transactions.

Name of Person Reporting	Date of Report
Duncan, Stuart K.	04/02/2025

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/ Stuart K. Duncan

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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