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
Gergel, Richard M.	District of South Carolina	5/09/2025
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**
United States District Judge- Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
85 Broad Street Charleston, SC 29401		

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.		
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.	The Harvard Law School	March 4-6, 2024	Cambridge, Mass.	Speech, Moot Court Competition Judge	Hotel, meals, travel
2.	Texas Tech University MDL Judicial Summit	June 2-5, 2024	Aspen, Colorado	Attendance at conference, participation on panel discussion	Travel, hotel, meals
3.	U.S. Supreme Court Historical Society	May 21-22, 2024	Washington, D.C.	Speech	Travel, hotel, meals
4.	University of Georgia Law School	November 10-12, 2024	Athens, Ga.	Speech	Travel, hotel, meals

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
Gergel, Richard M.	5/09/2025

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. Lincoln National Universal Life Insurance	B	Int./Div.	K	T					
2. Am Balanced Class A	B	Interest	J	T					
3. Am. High Income Trust Class A	A	Int./Div.	K	T					
4. Bank of America Checking	A	Int./Div.	K	T					
5. TIAA-CREF Fixed Annuity	D	Int./Div.	J	T					
6. Wachovia Certificates of Deposit	A	Int./Div.	J	T					
7. Blackrock Global Allocation Fund (BDMIX)	A	Int./Div.	J	T	Sold (part)	01/30/24	J	A	
8.					Sold (part)	02/12/24	J	A	
9.					Sold (part)	04/12/24	J	A	
10.					Sold (part)	06/18/24	J	A	
11.					Buy (add'l)	09/26/24	J		
12.					Buy (add'l)	12/17/24	J		
13. Blackrock Equity Driven Fund (BILPX)	A	Int./Div.	J	T	Sold (part)	01/29/24	J	A	
14.					Buy (add'l)	02/09/24	J		
15.					Sold (part)	04/12/24	J	A	
16.					Sold (part)	06/18/24	J	A	
17.					Buy (add'l)	09/26/24	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

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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. American Fund Global Allocation Fund	A	Int./Div.	K	T	Sold (part)	01/29/24	J	A	
19.					Sold (part)	02/12/24	J	A	
20.					Sold (part)	03/05/24	J	A	
21.					Sold (part)	04/12/24	J	A	
22.					Sold (part)	06/18/24	J	A	
23. First Eagle Global Fund (SGIIX)	A	Dividend	K	T	Sold (part)	01/30/24	J	A	
24.					Buy (add'l)	02/12/24	J		
25.					Sold (part)	04/12/24	J	A	
26.					Sold (part)	06/18/24	J	A	
27.					Buy (add'l)	12/18/24	J		
28. FIA Card SErvices Money Market	A	Interest	J	T					
29. Merill Lynch Bank Deposit Fund	A	Interest	J	T					
30. BOA Cash Reserve Money Market Fund	A	Interest	J	T					
31. IShares US Preferred Stock ETF (PFF)	A	Int./Div.			Sold	03/06/24	J	A	
32. JP Morgan Exchange Traded FD TR S (JEPI)	A	Int./Div.	J	T	Buy	03/06/24	J		
33.					Sold (part)	04/12/24	J	A	
34.					Buy (add'l)	12/17/24	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		
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35. JPM NASDAQ (JEPQ)	A	Int./Div.	J	T	Buy	03/06/24	J		
36.					Sold (part)	04/15/24	J	A	
37.					Sold (part)	06/18/24	J	A	
38.					Buy (add'l)	12/18/24	J		
39. JP Morgan Hedge Funds (JHQDX)	A	Int./Div.	J	T	Sold (part)	01/30/24	J	A	
40.					Sold (part)	02/09/24	J	A	
41.					Sold (part)	04/12/24	J	A	
42.					Sold (part)	06/17/24	J	A	
43.					Sold (part)	09/26/24	J	A	
44. IShares TIPS Bond (TIP)	A	Int./Div.			Sold (part)	01/31/24	J	A	
45.					Sold	03/06/24	J	A	
46. Abbey Capital Futures (ABYIX)	A	Int./Div.	J	T	Sold (part)	01/30/24	J	A	
47.					Sold (part)	02/12/24	J	A	
48.					Sold (part)	04/12/24	J	A	
49.					Sold (part)	06/18/24	J	A	
50.					Buy (add'l)	09/26/24	J		
51.					Buy (add'l)	12/18/24	J		

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52. Abbey Capital MAFIX)	A	Int./Div.	J	T	Sold (part)	01/30/24	J	A	
53.					Sold (part)	02/12/24	J	A	
54.					Sold (part)	04/12/24	J	A	
55.					Sold (part)	06/18/24	J	A	
56.					Buy (add'l)	12/18/24	J		
57. AQR Diversified (ADAIX)	A	Int./Div.	J	T	Sold (part)	01/30/24	J	A	
58.					Buy (add'l)	01/12/24	J		
59.					Sold (part)	04/12/24	J	A	
60.					Sold (part)	06/18/24	J	A	
61.					Sold (part)	09/26/24	J	A	
62.					Buy (add'l)	12/18/24	J		
63. Gotham Index Plus Fund (GINDX)	A	Int./Div.	J	T	Sold (part)	01/30/24	J	A	
64.					Sold (part)	04/12/24	J	A	
65.					Sold (part)	06/18/24	J	A	
66.					Sold (part)	09/26/24	J	A	
67. John Hancock Diversified ((JDJIX)	A	Int./Div.	J	T	Buy (add'l)	02/12/24	J		
68.					Sold (part)	04/12/24	J		

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69.					Sold (part)	06/18/24	J	A	
70.					Buy (add'l)	09/26/24	J		
71. Neuberger Berman Long Short Fund (NLSIX)	A	Int./Div.	J	T	Buy	02/12/24	J		
72.					Sold (part)	04/12/24	J	A	
73.					Sold (part)	06/18/24	J		
74.					Sold (part)	09/26/24	J	A	
75. Victory Market Neutral Inome Fund (CBHIX)	A	Int./Div.	J	T	Sold (part)	06/18/24	J	A	
76. Federated Hermes Govt Obligations Fund ((GOVXX)	A	Int./Div.	J	T	Sold (part)	01/30/24	J	A	
77.					Buy (add'l)	02/12/24	J		
78.					Buy (add'l)	03/05/24	J		
79.					Buy (add'l)	03/06/24	J		
80.					Sold (part)	04/12/24	J	A	
81.					Buy (add'l)	12/18/24	J		
82. GLB X Funds (XYLD)	A	Int./Div.	J	T	Buy	03/06/24	J		
83.					Sold (part)	04/15/24	J	A	
84.					Sold (part)	06/18/24	J	A	
85.					Buy (add'l)	12/18/24	J		

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86. Global X Russell (RYLD)	A	Int./Div.	J	T	Buy	03/06/24	J		
87.					Sold (part)	04/15/24	J	A	
88.					Sold (part)	06/18/24	J	A	
89.					Buy (add'l)	12/18/24	J		
90. Global X FDS NASDAQ (QYLD)	A	Int./Div.	J	T	Buy	03/06/24	J		
91.					Sold (part)	04/15/24	J	A	
92.					Sold (part)	06/18/24	J	A	
93.					Buy (add'l)	12/18/24	J		
94. Catalyst Millburn Hedge (MBXIX)	A	Int./Div.	J	T	Buy	09/26/24	J		
95. Vanguard Russell VTWO	A	Int./Div.			Sold	01/19/24	J	A	
96. Tracer Trendpilot ((PTLC)	A	Int./Div.			Sold	01/19/24	J	A	
97. Vanguard Total Int Bond (BNDX)	A	Int./Div.			Sold	01/19/24	J	A	
98. Tracer Trendpilot Mid Cap (PTMC)	A	Int./Div.			Sold	01/19/24	J	A	
99. IShares Broad US Dollar (USIG)	A	Int./Div.			Sold	01/19/24	J	A	
100. IShares Corp S & P (IUSG)	A	Int./Div.			Sold	01/19/24	J	A	
101. IShares Core S & P (IUSV)	A	Int./Div.			Sold	01/19/24	J	A	
102. Vanguard Mortgage Backed Sec (VMBS)	A	Int./Div.			Sold	01/19/24	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; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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103. Vanguard FTSE Dev Markets (VEA)	A	Int./Div.			Sold	01/19/24	J	A	
104. Victory Shares US 500 (CFO)	A	Int./Div.			Sold	01/19/24	J	A	
105. Victory Shares US Eq Income (CDC)	A	Int./Div.			Sold	01/19/24	J	A	
106. IShares US Treasury (GOVT)	A	Int./Div.			Sold	01/19/24	J	A	
107. SPDR Portfolio Lolng Term (SPTL)	A	Int./Div.			Sold	01/19/24	J	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

Name of Person Reporting	Date of Report
Gergel, Richard M.	5/09/2025

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

Name of Person Reporting	Date of Report
Gergel, Richard M.	5/09/2025

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/ Richard M. Gergel

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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