Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Lake, Simeon Timothy
U.S. District Court - Texas Southern
Senior District Judge

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. Â§ 13141 et. seq., 5 U.S.C. Â§ 7353, and Judicial Conference regulations.

/s/ Lake, Simeon Timothy [electronically signed on Mar 13, 2026 12:32pm by Lake, Simeon Timothy in JEFS]
/s/ Lake, Simeon Timothy [electronically signed on Feb 27, 2026 2:25pm by Lake, Simeon Timothy in JEFS]

I. Positions

I do not have any Positions to report
No entries in this section

II. Agreements

I do not have any Agreements to report
No entries in this section

III A. Filer Non-Investment Income

I do not have any Filer Non-Investment Income to report
No entries in this section

III B. Spouse Non-Investment Income

I do not have any Spouse Non-Investment Income to report
No entries in this section

IV. Reimbursements

I do not have any Reimbursements to report
No entries in this section

V. Gifts

I do not have any Gifts to report

No entries in this section

VI. Liabilities

I do not have any Liabilities to report
No entries in this section

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**Rental Property #1-Houston, TX**	$1,000 or less	Rent	$500,001 - $1,000,000	Estimated
2.	**Rental Property #2-Houston, TX**	$1,000 or less	Rent	$50,001 - $100,000	Estimated
3.	**Rental Property #3-Houston, TX**	$1,001 - $2,500	Rent	$50,001 - $100,000	Estimated
4.	**Property-Washington Cnty, TX P1**	$1,000 or less	Rent	$1,000,001 - $5,000,000	Estimated
5.	**Bank of Texas Account**	$1,000 or less	Interest	$15,000 or less	Cash/Market
6.	**Royalty Mineral Interest, Washington Cnty, TX**	$50,001 - $100,000	Royalty	$100,001 - $250,000	Estimated
7.	**Merrill Lynch Money Mkt Acct (Bank of America) P1**	$15,001 - $50,000	Interest	$1,000,001 - $5,000,000	Cash/Market
8.	**AT&T Inc. Common Stock (IRA)**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
9.	**Novartis ADR (IRA)**	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
10.	**IBM Corp. Common Stock (IRA)**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
11.	**Intel Corp. Common Stock (IRA)**		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 5, 2025	$15,000 or less

12.	**Nestle Corp. ADR (IRA)**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
13.	**Dr. Reddy's Lab ADR (IRA)**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
14.	**Johnson & Johnson Inc. Common Stock (IRA)**	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
15.	**Procter & Gamble Inc. Common Stock (IRA)**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
16.	**Microsoft Common Stock (IRA)**	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
17.	**Glaxo Smith Kline PLC Common Stock (IRA)**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
18.	**McCormick Inc. Non-Voting Common Stock (IRA)**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
19.	**Pfizer Inc. Common Stock (IRA)**	$5,001 - $15,000	Dividend	$50,001 - $100,000	Cash/Market
20.	**Unilever PLC ADR (IRA)**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Exchange	Dec 9, 2025	$15,001 - $50,000

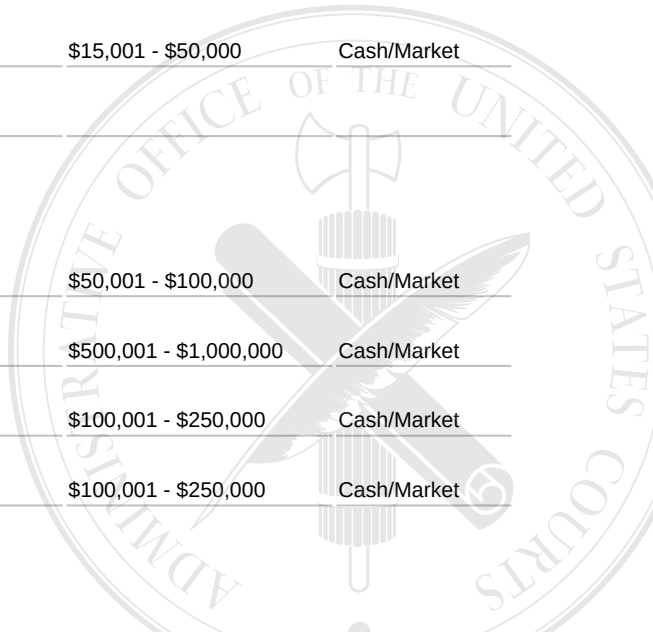
21.	**3M Company Common Stock (IRA)**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
22.	**Blackrock Liquidity FundFund Instl CL (IRA)**	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
23.	**SPDR Portfolio S&P 500G (IRA)**	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
24.	**ISHARES Core S&P ETF (IRA) (IVV)**	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
25.	**Haleon PLC (IRA)**	$2,501 - $5,000	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Dec 9, 2025	$15,001 - $50,000

26.	**Exxon Common Stock P1**	$100,001 - $1,000,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
27.	**AT&T Inc. Common Stock**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
28.	**Abbott Labs Common Stock**	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
29.	**Abbvie Inc. Common Stock**	$15,001 - $50,000	Dividend	$500,001 - $1,000,000	Cash/Market
30.	**Mondelez International, Inc. Common Stock**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
31.	**Cisco Systems Inc.**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
32.	**(H) TRUST #2**				
A.	--Exxon Corp. Common Stock P1	$100,001 - $1,000,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
B.	--Abbott Labs Common Stock	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
C.	--Abbvie Inc. Common Stock	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
33.	**PPL Corp. Commom Stock**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
34.	**Coca Cola Company Common Stock**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
35.	**Kraft Heinz Co. Common Stock**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
36.	**Intel Corp. Common Stock**		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 5, 2025	$15,001 - $50,000

37.	**Johnson & Johnson Common Stock**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
38.	**Microsoft Corp.**	$2,501 - $5,000	Dividend	$500,001 - $1,000,000	Cash/Market
39.	**SPDR Dow Jones Industrial Avg ETF Trust**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
40.	**Caterpillar Inc.**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
41.	**Procter & Gamble Co.**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
42.	**Apple Inc. P2**	$15,001 - $50,000	Dividend	$5,000,001 - $25,000,000	Cash/Market
43.	**Bristol-Meyers Squib Common Stock**	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
44.	**Conagra Foods Inc. Common Stock**	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
45.	**Neogenomics, Inc. Common Stock**	$5,001 - $15,000	Gain		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Aug 5, 2025	$15,001 - $50,000

46.	**PPL Corp.**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
47.	**Lamb Weston Holdings**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
48.	**XCEL Energy Inc. Common Stock**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
49.	**Invesco High Yield Municipal Fund**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
50.	**Nuveen Municipal Value Fund**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
51.	**Nuveen Tax Free Advantage Municipal Fund**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
52.	**Putnam Tax Free High Yield Fund Class**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Exchange	Oct 28, 2025	$100,001 - $250,000

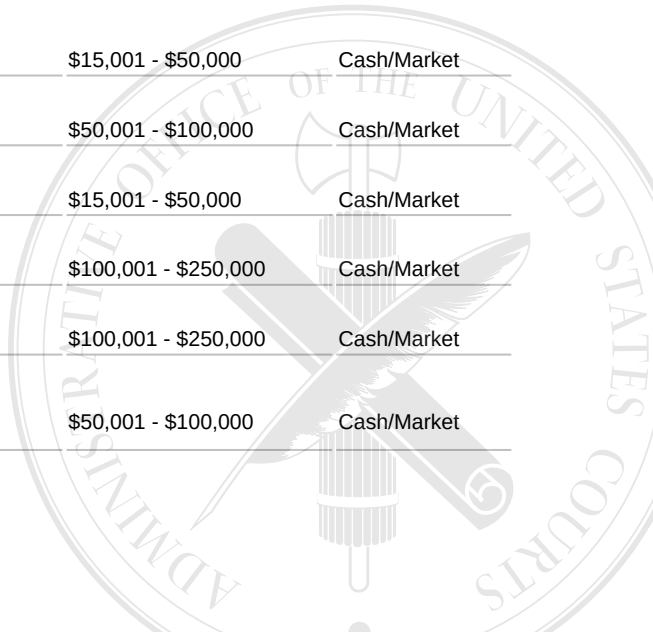
53.	**Bluebird Bio Inc. Common Stock**		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Mar 18, 2025	$15,000 or less

54.	**Sangamo Therapeutics Inc.**		None	$15,000 or less	Cash/Market
55.	**Fidelity Money Mkt Account**	$1,000 or less	Interest		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Closed	Jan 28, 2025	$100,001 - $250,000

56.	**Gilead Sciences Common Stock**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
57.	**Biogen Idec B11B Common Stock**		None	$50,001 - $100,000	Cash/Market
58.	**Verizon Communications**	$2,501 - $5,000	Dividend	$15,001 - $50,000	Cash/Market
59.	**Invesco QQQ Tr Unit Series 1 (ETF)**	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
60.	**Amazon Com. Inc.**		None	$100,001 - $250,000	Cash/Market
61.	**I Shares Trust Core Dividend Growth (DGRO)**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market



	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
62.	**I Shares S&P 500 Growth ETF (IVW)**	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
63.	**I Shares S&P 500 (IVV)**	$1,001 - $2,500	Dividend	$100,001 - $250,000	Cash/Market
64.	**Visa Inc.**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
65.	**Qualcomm Incorporated**	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
66.	**Magnum Ice Cream Co.**		None	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Spinoff (identify source in note)	Dec 8, 2025	$15,000 or less

Additional Explanation: Spinoff from line 20 - Unilever PLC ADR (IRA).

67.	**Magnum Ice Cream Co.**		None		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Dec 9, 2025	$15,000 or less

68.	**Franklin Municipal High Yield ETF**	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Exchange	Oct 28, 2025	$100,001 - $250,000

Additional Explanation: Own. Exchanged for line 52 - Putnam Tax Free High Yield Fund Class

69.	**UNILEVER PLC New ADR**	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Exchange	Dec 9, 2025	$15,001 - $50,000

Additional Explanation: Own. Exchanged for line 20 - Unilever PLC ADR (IRA).

VIII. Additional Information or Explanations

	ADDITIONAL INFORMATION OR EXPLANATION
1.	Line 53 - Because Bluebird Bio Inc. was sold for less than $1,000, a Periodic Transaction Report was not filed for the sale.