AO 10
Rev. 1/2022

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2021

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 101-111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Lee, Tom S.	United States District Court, Southern District of MS	06/11/2022
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 United States District Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
501 East Court Street Suite 4.756 Jackson, MS 39201		

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.	General Partner	Tom S. Lee Family Limited Partnership
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.	2021	State Empoiyee Pension Fund, position upon retirement age 65
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.	2021	Advisory Board of Community Bancshares of MS, Inc.
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
Lee, Tom S.	06/11/2022

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	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(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. Nationwide VA(H)									
2. Managed Risk Asset Allocation		None	O	T					
3. IRA (H)									
4. Am. Corp. Bond					Sold	10/22/21	J	A	
5. Am.E.M. Bond					Sold	10/22/21	J	A	
6. New World	A	Dividend	J	T					
7. Bond Fund of America	B	Dividend	K	T					
8. Capital Income Builder					Sold	10/22/21	K	C	
9. Growth Fund of America					Sold	10/22/21	M	F	
10. Goldman Sachs Small Cap Growth					Sold	02/23/21	K	C	
11. Inter. Bond Fund of Ameria					Sold	10/22/21	K	B	
12. Investment Company of America					Sold	10/25/21	L	E	
13. Smallcap World					Sold	10/25/21	L	E	
14. Washington Mutual Investors					Sold	10/25/21	M	E	
15. Wisdomtree U.S. Div. Growth	A	Dividend	M	T	Buy	10/25/21	L		
16. Wisdomtree U.S. Large Cap. Division	A	Dividend	K	T	Buy	10/25/21	K		
17. Grayscale Ethereum	A	Dividend	K	T	Buy	10/25/21	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

Name of Person Reporting	Date of Report
Lee, Tom S.	06/11/2022

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. Grayscale Bitcoin	A	Dividend	K	T	Buy	10/25/21	L		
19. Invesco QQQ	A	Dividend	L	T	Buy	10/25/21	L		
20. SPDR S&P Growth	A	Dividend	L	T	Buy	10/25/21	K		
21. Alger Small Cap. Focus	A	Dividend	K	T	Buy	10/25/21	K		
22. American Int'l	A	Dividend	K	T	Buy	10/25/21	K		
23. Blackrock Multi Asset	A	Dividend	K	T	Buy	10/25/21	K		
24. Int'l Growth & Income	A	Dividend	K	T	Buy	10/25/21	K		
25. American Conservative G&I	A	Dividend	K	T	Buy	10/25/21	K		
26. J. Hancock Disc.Val. Mid	A	Dividend	L	T	Buy	10/25/21	J		
27. Invesco Dev. Markets	A	Dividend	J	T	Buy	10/25/21	J		
28. PIMCO Inv. Grade Credit	A	Dividend	L	T	Buy	10/25/21	K		
29. Principal Spec. PFD	A	Dividend	K	T	Buy	10/25/21	K		
30. T. Rowe Price Small Cap. Value	A	Dividend	K	T	Buy	10/25/21	K		
31. Blackrock Small Cap Growth	A	Dividend	K	T	Buy	10/25/21	K		
32. PIMCO Total Return	A	Dividend	L	T	Buy	10/25/21	L		
33. [redacted] Rev. Trust (H)									
34. Am. Corp. Bond					Sold	10/22/21	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

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35. Am. E.M. Bond					Sold	10/22/21	J	A	
36. New World	A	Dividend	J	T					
37. Bond Fund of America					Sold	10/22/21	M	D	
38. Capital Income Builder					Sold	10/22/21	K	D	
39. Growth Fund of America	A	Dividend	L	T					
40. Goldman Sachs Small Cap Growth					Sold	02/23/21	K	D	
41. Inter. Bond Fund of America					Sold	02/23/21	K	B	
42. Investment Co. of America	A	Dividend	L	T					
43. Small Cap. World	A	Dividend	K	T					
44. Washington Mutual	B	Dividend	M	T					
45. Wisdomtree US Div. Growth	A	Dividend	K	T	Buy	10/25/21	K		
46. Wisdomtree Large Cap. Div.	A	Dividend	K	T	Buy	10/25/21	K		
47. Grayscale Ethereum	A	Dividend	J	T	Buy	10/25/21	J		
48. Grayscale Bitcoin	A	Dividend	K	T	Buy	10/25/21	K		
49. iShares Nat'l Muni	A	Dividend	K	T	Buy	10/25/21	K		
50. Invesco QQQ	A	Dividend	K	T	Buy	10/25/21	K		
51. SPDR S&P 500 Growth	A	Dividend	K	T	Buy	10/25/21	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	
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☐ NONE *(No reportable income, assets, or transactions.)*

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52. Alger Small Cap Focus	A	Dividend	J	T	Buy	10/25/21	J		
53. American High Income Muni	A	Dividend	K	T	Buy	10/25/21	K		
54. J. Hancock Disc Vol Muni	A	Dividend	J	T	Buy	10/25/21	K		
55. T. Rowe Price Muni Int	A	Dividend	K	T	Buy	10/25/21	K		
56. T. Rowe Price Snall Cap Value	A	Dividend	J	T	Buy	10/25/21	J		
57. American Tax Exenpt Bond	A	Dividend	K	T	Buy	10/25/21	K		
58. Thornburg Str Muni	A	Dividend	J	T	Buy	10/25/21	J		
59. AF Tax Aware Conservative G&I	A	Dividend	K	T	Buy	10/25/21	K		
60. [redacted] FLP (H)									
61. Am. Corp. Bond	A	Dividend	K	T					
62. Am. E.M. Bond	A	Dividend	K	T					
63. New World	A	Dividend	L	T					
64. Bond Fund of America	D	Dividend	N	T					
65. Capital Income Builder	B	Dividend	L	T					
66. Growth Fund of America	B	Dividend	M	T					
67. Goldman Sachs Small Cap. Growth					Sold	02/23/21	K	E	
68. Inter. Bond Fund of America	C	Dividend	L	T					

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
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69. Investment Co. of America	B	Dividend	M	T					
70. Small Cap. World	A	Dividend	M	T					
71. Washington Mutual	B	Dividend	N	T					
72. J. Hancock Disc Val Mid	A	Dividend	M	T	Buy	02/23/21	L		
73. IRA (H)									
74. Franklin Income	A	Dividend	J	T					
75. Templeton Global Balanced	A	Dividend	J	T					
76. Rev. Trust (H)									
77. Am. Corp. Bond					Sold	10/22/21	J	A	
78. Am E.M. Bond					Sold	10/22/21	J	A	
79. New World	A	Dividend	J	T					
80. Bond Fund of America					Sold	10/22/21	L	B	
81. Capital Income Builder					Sold	10/22/21	J	C	
82. Growth Fund of America					Sold	02/23/21	J	C	
83. Goldman Sachs Small Cap. Growth					Sold	10/22/21	K	B	
84. Inter. Bond of America	A	Dividend	L	T					
85. Investment Co. of America	A	Dividend	M	T					

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	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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86. Small Cap. World	A	Dividend	N	T					
87. Washington Mutual	B	Dividend	M	T					
88. Wisdomtree US Div Growth	A	Dividend	K	T	Buy	10/25/21	K		
89. Wisdomtree US Large Cap Div	A	Dividend	J	T	Buy	10/25/21	K		
90. Grayscale Ethereum	A	Dividend	J	T	Buy	10/25/21	J		
91. Grayscale Bitcoin	A	Dividend	J	T	Buy	10/25/21	K		
92. iShares National Muni	A	Dividend	J	T	Buy	10/25/21	K		
93. Invesco QQQ	A	Dividend	J	T	Buy	10/25/21	K		
94. SDPR S&P 500 Growth	A	Dividend	J	T	Buy	10/25/21	K		
95. Alger Small Cap Focus	A	Dividend	J	T	Buy	10/25/21	J		
96. American High Income Muni	A	Dividend	J	T	Buy	10/25/21	K		
97. J. Hancock Disc Val Mid	A	Dividend	J	T	Buy	10/25/21	K		
98. T.Rowe Price Muni Int	A	Dividend	K	T	Buy	10/25/21	K		
99. T.Rowe Price Small Cap	A	Dividend	J	T	Buy	10/25/21	J		
100. American Tax Exempt Bond	A	Dividend	K	T	Buy	10/25/21	K		
101. Thornburg Str. Muni	A	Dividend	J	T	Buy	10/25/21	J		
102. AF Tax Aware Conservative G&I	A	Dividend	K	T	Buy	10/25/21	K		

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103. VOYA VA (H)									
104. Invesco Equity and Income		None	K	T					
105. VOYA VA II (H)									
106. Invesco Equity and Income		None	J	T					
107. VOYA VA (H)									
108. Invesco Equity and Income		None	J	T					
109. Prudential VA (H)									
110. Wellington Hedged Equity		None	L	T					
111. Advanced Strategies Portfolio		None	L	T					
112. Western Core Plus Bond		None	M	T					
113. Prudential VA (H)									
114. Wellington Hedged Equity		None	L	T					
115. Advanced Strategies Portfolio		None	L	T					
116. Western Core Plus Bond		None	M	T					
117. Shares of Community Bancshares of MS, Inc.	E	Dividend	P1	T					
118. Land in Scott County, MS		None	K	W					
119. Phoenix Life (Whole Life)		None	M	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		

Name of Person Reporting	Date of Report
Lee, Tom S.	06/11/2022

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	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(1) Amount Code 1 (A-H)	(2) Type (e g , div , rent, or int)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e g , buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
120. Community Bancshares of MS accounts	B	Interest	O	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		

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

Name of Person Reporting	Date of Report
Lee, Tom S.	06/11/2022

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

Signature: s/ Tom S. Lee

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. § 104)

Committee on Financial Disclosure
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