AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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
Lee, Tom S.	United States District Court, Southern District of MS	05/09/2023
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	01/01/2022 **to** 12/31/2022
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.	05/09/2023

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		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(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.	His Nationwide VA(H)									
2.	Managed Risk Asset Allocation		None	N	T					
3.	His IRA (H)									
4.	Avantis US Small Cap Value	A	Dividend	K	T	Buy	10/21/22	K		
5.	Invesco S&P Mid Cap Momentum	A	Dividend	K	T	Buy	10/21/22	K		
6.	Columbia Global Value	A	Dividend	J	T	Buy	10/21/22	J		
7.	Delaware Corp Bond	A	Dividend	K	T	Buy	10/21/22	K		
8.	Am Ret Inc. Conservative	A	Dividend	L	T	Buy	10/21/22	L		
9.	Fed Hermes Kaufman Small	A	Dividend	K	T	Buy	10/21/22	K		
10.	GQB Port Em Markets	A	Dividend	J	T	Buy	10/21/22	J		
11.	Nexpoint Merger Arb	A	Dividend	K	T	Buy	05/25/22	K		
12.	Am Cons Growth & Inc	A	Dividend	K	T	Buy	10/21/22	K		
13.	PGIM Jenn Global Equity	A	Dividend	J	T	Buy	10/21/22	J		
14.	John Hancock Bond	B	Dividend	L	T	Buy	10/21/22	L		
15.	Invesco Dev. Markets	A	Dividend	J	T	Buy	05/25/22	K		
16.	Principal Core Fixed	A	Dividend	K	T	Buy	10/21/22	K		
17.	Thornburg Global Opps	A	Dividend	J	T	Buy	10/21/22	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. New World	A	Dividend			Sold	05/25/22	K	A	
19. Bond Fund of America	B	Dividend			Sold	05/25/22	L	A	
20. Wisdomtree U.S. Div. Growth	B	Dividend	L	T					
21. Wisdomtree U.S. Large Cap. Dividend	A	Dividend	K	T					
22. Grayscale Ethereum	A	Dividend			Sold	05/24/22	J		
23. Grayscale Bitcoin	A	Dividend	K	T					
24. Invesco QQQ	A	Dividend	K	T					
25. SPDR S&P Growth	A	Dividend	K	T					
26. Alger Small Cap. Focus	A	Dividend			Sold	04/18/22	K		
27. American Int'l	A	Dividend			Sold	04/18/22	K		
28. Blackrock Multi Asset	B	Dividend			Sold	05/25/22	K		
29. Int'l Growth & Income	A	Dividend			Sold	04/18/22	K		
30. American Conservative G&I	A	Dividend			Sold	11/03/22	K		
31. J. Hancock Disc.Val. Mid	A	Dividend	K	T					
32. Invesco Dev. Markets	A	Dividend	J	T					
33. PIMCO Inv. Grade Credit	B	Dividend			Sold	10/21/22	K		
34. Principal Spec. PFD	A	Dividend			Sold	04/18/22	K		

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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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35. T. Rowe Price Small Cap. Value	A	Dividend			Sold	07/12/22	K		
36. Blackrock Small Cap Growth	A	Dividend			Sold	04/18/22	K		
37. PIMCO Total Return	C	Dividend			Sold	10/21/22	L		
38. His. Rev. Trust (H)									
39. Invesco RAFI Str.	A	Dividend	J	T	Buy	10/21/22	J		
40. Am Century Small	A	Dividend	J	T	Buy	10/21/22	J		
41. BNY Mellon AMT Free	A	Dividend	K	T	Buy	10/21/22	K		
42. Parametric Tabs 5-15	A	Dividend	K	T	Buy	10/21/22	K		
43. Kensington Dynamic	A	Dividend	J	T	Buy	07/13/22	K		
44. Mainstay Mackay High Yield	A	Dividend	K	T	Buy	10/21/22	K		
45. Nuveen Int Duration	A	Dividend	K	T	Buy	05/23/22	K		
46. Invesco Dev Markets	A	Dividend	J	T	Buy	05/23/22	J		
47. Thornburg LTD Term	A	Dividend	J	T	Buy	10/21/22	J		
48. Thornburg Global	A	Dividend	J	T	Buy	10/21/22	J		
49. New World	A	Dividend			Sold	10/21/22	J	A	
50. Growth Fund of America	A	Dividend	L	T					
51. Investment Co. of America	A	Dividend	L	T					

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52. Small Cap. World	A	Dividend	K	T					
53. Washington Mutual	B	Dividend	L	T					
54. Wisdomtree US Div. Growth	A	Dividend	K	T					
55. Wisdomtree Large Cap. Div.	A	Dividend	K	T					
56. Grayscale Ethereum	A	Dividend			Sold	05/24/22	J	A	
57. Grayscale Bitcoin	A	Dividend	J	T					
58. iShares Nat'l Muni	A	Dividend			Sold	04/18/22	K		
59. Invesco QQQ	A	Dividend	J	T					
60. SPDR S&P 500 Growth	A	Dividend	J	T					
61. Alger Small Cap Focus	A	Dividend			Sold	04/18/22	J		
62. American High Income Muni	A	Dividend			Sold	05/23/22	K		
63. J. Hancock Disc Vol Muni	A	Dividend	J	T					
64. T. Rowe Price Muni Int	A	Dividend			Sold	05/23/22	K		
65. T. Rowe Price Snall Cap Value	A	Dividend			Sold	07/13/22	J		
66. American Tax Exenpt Bond	A	Dividend			Sold	10/21/22	L		
67. Thornburg Str Muni	A	Dividend			Sold	10/21/22	L		
68. AF Tax Aware Conservative G&I	A	Dividend	K	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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69. His FLP (H)									
70. Am Str Bond	A	Dividend	K	T	Buy	10/17/22	K		
71. Am. Corp. Bond	A	Dividend	K	T					
72. Am. E.M. Bond	A	Dividend			Sold	06/13/22	K		
73. New World	A	Dividend	L	T					
74. Bond Fund of America	D	Dividend	N	T					
75. Capital Income Builder	B	Dividend	L	T					
76. Growth Fund of America	B	Dividend	M	T					
77. Inter. Bond Fund of America	B	Dividend	K	T					
78. Investment Co. of America	B	Dividend	M	T					
79. Small Cap. World	A	Dividend	M	T					
80. Washington Mutual	B	Dividend	M	T					
81. J. Hancock Disc Val Mid	A	Dividend	M	T					
82. [redacted] IRA (H)									
83. Franklin Income	A	Dividend	J	T					
84. Templeton Global Balanced	A	Dividend	J	T					
85. [redacted] Rev. Trust (H)									

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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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86. Invesco RAFI Str.	A	Dividend	J	T	Buy	10/20/22	J		
87. Amerian Century Small	A	Dividend	J	T	Buy	10/21/22	J		
88. BNY Mellon AMT Free	A	Dividend	K	T	Buy	10/21/22	K		
89. Parametric Tabs 5-15	A	Dividend	J	T	Buy	10/21/22	J		
90. Growth Fund of America	A	Dividend	K	T	Buy	01/03/22	K		
91. Kensington Dynamic	A	Dividend	J	T	Buy	07/13/22	J		
92. Mainstay Mackay High Yield	A	Dividend	J	T	Buy	10/21/22	J		
93. Nuveen Int Duration	A	Dividend	K	T	Buy	05/23/22	J		
94. Invesco Dev Markets	A	Dividend	J	T	Buy	05/23/22	J		
95. Thornburt LTD Term	A	Dividend	J	T	Buy	10/21/22	J		
96. Thornburg Global	A	Dividend	J	T	Buy	10/21/22	J		
97. New World	A	Dividend			Sold	10/21/22	J	A	
98. Inter. Bond of America	A	Dividend			Sold	01/03/22	L	A	
99. Investment Co. of America	A	Dividend	K	T					
100. Small Cap. World	A	Dividend	K	T					
101. Washington Mutual	A	Dividend	K	T					
102. Wisdomtree US Div Growth	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)
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2. Value Codes (See Columns C1 and D3)
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103. Wisdomtree US Large Cap Div	A	Dividend	J	T					
104. Grayscale Ethereum	A	Dividend	J	T	Sold	05/24/22	J		
105. Grayscale Bitcoin	A	Dividend	J	T					
106. iShares National Muni	A	Dividend			Sold	04/18/22	J		
107. Invesco QQQ	A	Dividend	J	T					
108. SDPR S&P 500 Growth	A	Dividend	J	T					
109. Alger Small Cap Focus	A	Dividend			Sold	04/18/22	J		
110. American High Income Muni	A	Dividend			Sold	05/23/22	J		
111. J. Hancock Disc Val Mid	A	Dividend	J	T					
112. T.Rowe Price Muni Int	A	Dividend			Sold	05/23/22	J		
113. T.Rowe Price Small Cap	A	Dividend			Sold	07/13/22	J		
114. American Tax Exempt Bond	A	Dividend			Sold	10/21/22	K		
115. Thornburg Str. Muni	A	Dividend			Sold	10/21/22	K		
116. AF Tax Aware Conservative G&I	A	Dividend	K	T					
117. [redacted] VOYA VA (H)									
118. Invesco Equity and Income		None	K	T					
119. [redacted] VOYA VA II (H)									

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.	05/09/2023

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. Invesco Equity and Income		None	J	T					
121. His VOYA VA (H)									
122. Invesco Equity and Income		None	J	T					
123. [redacted] Prudential VA (H)									
124. Wellington Hedged Equity		None			Sold	01/03/22	L	A	
125. Advanced Strategies Portfolio		None	L	T					
126. Western Core Plus Bond		None	L	T					
127. His Prudential VA (H)									
128. Wellington Hedged Equity		None			Sold	01/03/22	L	A	
129. Advanced Strategies Portfolio		None	L	T					
130. Western Core Plus Bond		None	M	T					
131. Shares of Community Bancshares of MS, Inc.	E	Dividend	P1	T					
132. Land in Scott County, MS		None			Sold	01/03/22	K	D	
133. Phoenix Life (Whole Life)		None	M	T					
134. 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.	05/09/2023

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/ 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. § 13106)

Committee on Financial Disclosure
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