AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

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	05/09/2024
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	01/01/2023 **to** 12/31/2023
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.	2023	State Employee 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.	2023	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.	05/09/2024

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. [redacted] Nationwide VA(H)									
2. Managed Risk Asset Allocation		None	N	T					
3. [redacted] IRA(H)									
4. Avantis US Small Cap Value	A	Dividend			Sold	02/13/23	K	C	
5. Invesco S&P Mid Cap Momentum	A	Dividend			Sold	02/13/23	K	B	
6. Columbia Global Value	A	Dividend			Sold	02/13/23	J	A	
7. Delaware Corp Bond	A	Dividend			Sold	02/13/23	K	B	
8. Am Ret Inc. Conservative	A	Dividend			Sold	02/13/23	L	C	
9. Fed Hermes Kaufman Small	A	Dividend			Sold	02/13/23	K	C	
10. GQB Port Em Markets	A	Dividend			Sold	02/13/23	J	A	
11. Nexpoint Merger Arb	A	Dividend			Sold	02/13/23	K	A	
12. Am Cons Growth & Inc	A	Dividend			Sold	02/13/23	K	B	
13. PGIM Jenn Global Equity	A	Dividend			Sold	02/13/23	J	A	
14. John Hancock Bond	A	Dividend			Sold	02/13/23	L	C	
15. Invesco Dev. Markets	A	Dividend			Sold	02/13/23	L	B	
16. Principal Core Fixed	A	Dividend			Sold	02/13/23	K	C	
17. Thornburg Global Opps	A	Dividend			Sold	02/13/23	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

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Lee, Tom S.	05/09/2024

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. SPDR MSCI WORLD	A	Dividend	K	T	Buy	11/28/23	K		
19. Schwab US Dividend	B	Dividend	M	T	Buy	05/08/23	M		
20. Wisdomtree U.S. Div. Growth	B	Dividend	L	T					
21. Wisdomtree U.S. Large Cap Dividend	A	Dividend			Sold	02/13/23	K	B	
22. American Balanced	A	Dividend	L	T	Buy	02/13/23	M		
23. Grayscale Bitcoin	A	Dividend	L	T					
24. Invesco QQQ	A	Dividend	K	T					
25. SPDR S&P Growth	A	Dividend			Sold	02/13/23	K	A	
26. Income Fund of America	A	Dividend	K	T	Buy	02/13/23	L		
27. American Str. Bond	A	Dividend	K	T	Buy	02/13/23	K		
28. New Perspective	A	Dividend	K	T	Buy	02/13/23	K		
29. American Global Balanced	A	Dividend	K	T	Buy	02/13/23	L		
30. Capitol World G&I	A	Dividend	K	T	Buy	02/13/23	L		
31. J. Hancock Disc. Val. Mid.	A	Dividend			Sold	01/28/23	K	A	
32. American Multi Income	A	Dividend	K	T	Buy	02/13/23	K		
33. PIMCO Income	B	Dividend	L	T	Buy	02/13/23	L		
34. Small Cap World	A	Dividend	J	T	Buy	02/13/23	K		

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	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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35. Washington Mutual	A	Dividend	K	T	Buy	02/13/23	K		
36. Kensington Dynamic	A	Dividend			Sold	02/13/23	K	A	
37. SPDR Global Dow	A	Dividend			Sold	11/28/23	L	B	
38. [redacted] Rev. Trust (H)									
39. Invesco RAFI Str.	A	Dividend			Sold	04/06/23	J	A	
40. Am. Century Small	A	Dividend			Sold	12/04/23	J	A	
41. BNY Mellon AMT Free	A	Dividend			Sold	04/17/23	K	B	
42. Parametric Tabs 5-15	A	Dividend	K	T					
43. Kensington Dynamic	A	Dividend			Sold	02/13/23	J	A	
44. Mainstay Mackay High Yield	A	Dividend	K	T					
45. Nuveen Int duration	A	Dividend			Sold	12/04/23	K	B	
46. Invesco Dev Markets	A	Dividend	J	T					
47. Thornburg LTD Term	A	Dividend			Sold	02/13/23	J	A	
48. Thornburg Global	A	Dividend	J	T					
49. SDPR MSCI WORLD	A	Dividend	J	T	Buy	12/04/23	J		
50. Growth Fund of Ameria	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	M	T					
54. WisdonTree US. Div. Growth	A	Dividend	K	T					
55. Wisdomtree Large Cap. Div.	A	Dividend	K	T					
56. Schwab US Dividend	A	Dividend	K	T	Buy	05/22/23	K		
57. Grayscale Bitcoin	A	Dividend	K	T					
58. Invesco S&P Quality	A	Dividend	J	T	Buy	02/13/23	J		
59. Invesco QQQ	A	Dividend	K	T					
60. SPDR S&P 500 Growth	A	Dividend	J	T					
61. Thornburg Str Muni	A	Dividend	L	T	Buy	05/22/23	K		
62. J. Hancock Disc. Vol. Muni	A	Dividend	J	T					
63. AF Tax Aware Conserative G&I	A	Dividend	L	T					
64. [redacted] FLP (H)	A	Dividend		T					
65. Am Str. Bond	A	Dividend	K	T					
66. Inv. Co. of Americ	A	Dividend			Sold	05/30/23	J	A	
67. New World	A	Dividend			Sold	05/30/23	L	D	
68. Bond Fund of America	D	Dividend	M	T					

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69. Capital Income Builder	B	Dividend	L	T					
70. Growth Fund of America	B	Dividend	M	T					
71. Inter. Bond Fund of America	B	Dividend	K	T					
72. Investment Co. of America	B	Dividend	M	T					
73. Small Cap World	A	Dividend	L	T					
74. Washington Mutual	B	Dividend	M	T					
75. J. Hancock Disc Val Mid	A	Dividend	M	T					
76. [redacted] IRA (H)									
77. Franklin Income	A	Dividend	J	T					
78. Templeton Global Balanced	A	Dividend	J	T					
79. [redacted] Rev. Trust (H)									
80. Invesco RAFI Str.	A	Dividend			Sold	04/16/23	J	A	
81. American Century Small	A	Dividend			Sold	12/04/23	J	A	
82. BNY Mellon AMT Free	A	Dividend			Sold	04/17/23	K	B	
83. Parametric Tabs 5-15	A	Dividend	J	T					
84. Growth Fund of America	A	Dividend	K	T					
85. Kensington Dynamic	A	Dividend			Sold	02/13/23	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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86. Mainstay Mackay High Yield	A	Dividend	J	T					
87. Nuveen Int Duration	A	Dividend			Sold	12/04/23	K	A	
88. Invesco Dev. Markets	A	Dividend	J	T					
89. Thornburg LTD Term	A	Dividend			Sold	02/13/23	J	A	
90. Thornburg Global	A	Dividend	J	T					
91. SPDR MSCI World	A	Dividend	J	T	Buy	12/04/23	J		
92. Schwab US Dividend	A	Dividend	J	T	Buy	05/22/23	J		
93. Investment Co. of Amerifa	A	Dividend	K	T					
94. Small Cap. World	A	Dividend	K	T					
95. Washington Mutual	A	Dividend	L	T					
96. Wisdomtree US Div Growth	A	Dividend	J	T					
97. Wisdomtree US Large Cap Div	A	Dividend	J	T					
98. Invesco S&P 500 Quality	A	Dividend	J	T	Buy	02/13/23	J		
99. Grayscale Bitcoin	A	Dividend	J	T					
100. Thornburg Int. Muni	A	Dividend	J	T	Buy	12/04/23	J		
101. Invesco QQQ	A	Dividend	J	T					
102. SPDR S&P 500 Growth	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)
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103. Thornburg Str. Muni	A	Dividend	K	T	Buy	12/04/23	J		
104. J. Hancock Disc Val Mid	A	Dividend	J	T					
105. AF Tax Aware Conservative G&I	A	Dividend	K	T					
106. [redacted] VOYA VA (H)									
107. Invesco Equity and Income		None	K	T					
108. [redacted] VOYA VA II (H)									
109. Invesco Equity and Income		None	J	T					
110. [redacted] VOYA VA (H)									
111. Invesco Equity and Income		None	J	T					
112. [redacted] Prudential VA (H)									
113. Prudential Growth		None	L	T	Buy	01/03/23	L		
114. Advanced Strategies Portfolio		None	J	T					
115. Western Core Plus Bond		None	L	T					
116. [redacted] Prudential VA (H)									
117. Prudential Growth		None	L	T	Buy	01/03/23	L		
118. Advanced Strategites Portfolio		None	L	T					
119. Western Core Plus Bond		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.	05/09/2024

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. Shares of Community Bacshares of MS, Inc.	E	Dividend	P1	T					
121. Phoenix Life (Whole Life)		None	M	T					
122. Community Bancshares of MS accounts	B	Interest	O	T					
123.									

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.	05/09/2024

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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