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 |
|---|---|---|
| Lee, Tom S. | United States District Court, Southern District of MS | 05/09/2025 |
| **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** |
| Senior United States District Judge | ☐ Nomination Date<br>☐ Initial ☑ Annual ☐ Final<br>**5b.** ☐ Amended Report | 01/01/2024<br>**to**<br>12/31/2024 |
| **7. Chambers or Office Address** | | |
| 501 East Court Street<br>Suite 4.756<br>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. | | |

| Name of Person Reporting | Date of Report |
|---|---|
| **Lee, Tom S.** | 05/09/2025 |

## 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.** | 05/09/2025 |

## 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. [redacted]Nationwide VA(H) | | | | | | | | | |
| 2. Managed Risk Asset Allocation | | None | O | T | | | | | |
| 3. [redacted]IRA(H) | | | | | | | | | |
| 4. iShares Core Divid. | A | Dividend | L | T | Buy | 03/26/24 | L | | |
| 5. Franklin Bitcoin | | None | M | T | Buy | 09/03/24 | L | | |
| 6. AB Active Disruptors | A | Dividend | L | T | Buy | 06/11/24 | L | | |
| 7. Amer. Ret. Inc. Cons. | A | Dividend | K | T | Buy | 03/26/24 | L | | |
| 8. Am Cons. G & I | A | Dividend | K | T | Buy | 03/26/24 | L | | |
| 9. Thornburg Str. Icome | A | Dividend | L | T | Buy | 03/06/24 | L | | |
| 10. SPDR MSCI WORLD | A | Dividend | K | T | | | | | |
| 11. Schwab US Dividend | B | Dividend | | | Sold | 03/26/24 | M | E | |
| 12. Wisdomtree U.S. Div. Growth | B | Dividend | M | T | | | | | |
| 13. American Balanced | A | Dividend | | | Sold | 03/26/24 | L | D | |
| 14. Grayscale Bitcoin | A | Dividend | | | Sold | 10/14/24 | L | E | |
| 15. Invesco QQQ | A | Dividend | M | T | | | | | |
| 16. Income Fund of America | A | Dividend | | | Sold | 03/26/24 | K | A | |
| 17. American Str. Bond | A | Dividend | | | Sold | 03/26/24 | K | 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 |
|---|---|
| **Lee, Tom S.** | 05/09/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 18. New Perspective | A | Dividend | | | Sold | 03/26/24 | K | B | |
| 19. American Global Balanced | A | Dividend | | | Sold | 03/26/24 | K | C | |
| 20. Capitol World G&I | A | Dividend | | | Sold | 03/26/24 | K | D | |
| 21. American Multi Income | A | Dividend | | | Sold | 03/26/24 | K | B | |
| 22. PIMCO Income | C | Dividend | L | T | | | | | |
| 23. Small Cap World | A | Dividend | | | Sold | 03/26/24 | J | B | |
| 24. Washington Mutual | A | Dividend | | | Sold | 03/26/24 | K | B | |
| 25. [redacted] Rev. Trust (H) | | | | | | | | | |
| 26. AB Active Disruptors | A | Dividend | J | T | Buy | 06/11/24 | J | | |
| 27. Thornburg Int. Muni. | A | Dividend | K | T | Buy | 06/11/24 | K | | |
| 28. PIMCO Muni. Bond | A | Dividend | J | T | Buy | 06/11/24 | J | | |
| 29. Parametric Tabs 5-15 | A | Dividend | K | T | | | | | |
| 30. Mainstay Mackay High Yield | A | Dividend | K | T | | | | | |
| 31. Invesco Dev Markets | A | Dividend | | | Sold | 06/11/24 | J | B | |
| 32. Thornburg Global | A | Dividend | J | T | | | | | |
| 33. SDPR MSCI WORLD | A | Dividend | J | T | | | | | |
| 34. Growth Fund of Ameria | A | Dividend | L | 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.** | 05/09/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 35. Investment Co. of America | A | Dividend | L | T | | | | | |
| 36. Small Cap World | A | Dividend | K | T | | | | | |
| 37. Washington Mutual | B | Dividend | M | T | | | | | |
| 38. WisdonTree US. Div. Growth | A | Dividend | K | T | | | | | |
| 39. Wisdomtree Large Cap. Div. | A | Dividend | K | T | | | | | |
| 40. Schwab US Dividend | A | Dividend | K | T | | | | | |
| 41. Grayscale Bitcoin | | None | L | T | | | | | |
| 42. Invesco S&P Quality | A | Dividend | J | T | | | | | |
| 43. Invesco QQQ | A | Dividend | L | T | | | | | |
| 44. SPDR S&P 500 Growth | A | Dividend | K | T | | | | | |
| 45. Thornburg Str Muni | B | Dividend | L | T | | | | | |
| 46. J. Hancock Disc. Vol. Muni | A | Dividend | | | Sold | 06/11/24 | J | B | |
| 47. AF Tax Aware Conserative G&I | B | Dividend | L | T | | | | | |
| 48. [redacted]FLP (H) | | | | | | | | | |
| 49. Am Str. Bond | C | Dividend | M | T | | | | | |
| 50. EuroPacific Growth | A | Dividend | L | T | Buy | 04/08/24 | L | | |
| 51. American Mutual | A | Dividend | K | T | Buy | 04/08/24 | 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.** | 05/09/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 52. Bond Fund of America | D | Dividend | N | T | | | | | |
| 53. Harbor Small Cap Value | A | Dividend | K | T | Buy | 04/08/24 | K | | |
| 54. American Corp Bond | A | Dividend | K | T | Buy | 04/08/24 | K | | |
| 55. Capital Income Builder | A | Dividend | | | Sold | 04/08/24 | L | D | |
| 56. Growth Fund of America | B | Dividend | M | T | | | | | |
| 57. Inter. Bond Fund of America | B | Dividend | K | T | | | | | |
| 58. Investment Co. of America | B | Dividend | M | T | | | | | |
| 59. Small Cap World | A | Dividend | L | T | | | | | |
| 60. Washington Mutual | B | Dividend | M | T | | | | | |
| 61. J. Hancock Disc Val Mid | A | Dividend | M | T | | | | | |
| 62. [redacted] IRA (H) | | | | | | | | | |
| 63. Franklin Income | A | Dividend | J | T | | | | | |
| 64. Templeton Global Balanced | A | Dividend | J | T | | | | | |
| 65. [redacted] Rev. Trust (H) | | | | | | | | | |
| 66. AB Active Disruptors | A | Dividend | J | T | Buy | 06/11/24 | J | | |
| 67. American Century Small | A | Dividend | J | T | Buy | 06/11/24 | J | | |
| 68. Parametric Tabs 5-15 | 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
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.** | 05/09/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 69. Growth Fund of America | A | Dividend | K | T | | | | | |
| 70. Mainstay Mackay High Yield | A | Dividend | J | T | | | | | |
| 71. Invesco Dev. Markets | A | Dividend | | | Sold | 06/11/24 | J | A | |
| 72. Thornburg Global | A | Dividend | J | T | | | | | |
| 73. SPDR MSCI World | A | Dividend | J | T | | | | | |
| 74. Schwab US Dividend | A | Dividend | J | T | | | | | |
| 75. Investment Co. of Amerifa | A | Dividend | K | T | | | | | |
| 76. Small Cap. World | A | Dividend | K | T | | | | | |
| 77. Washington Mutual | A | Dividend | L | T | | | | | |
| 78. Wisdomtree US Div Growth | A | Dividend | J | T | | | | | |
| 79. Wisdomtree US Large Cap Div | A | Dividend | J | T | | | | | |
| 80. Invesco S&P 500 Quality | A | Dividend | J | T | | | | | |
| 81. Grayscale Bitcoin | | None | K | T | | | | | |
| 82. Thornburg Int. Muni | A | Dividend | J | T | | | | | |
| 83. Invesco QQQ | A | Dividend | K | T | | | | | |
| 84. SPDR S&P 500 Growth | A | Dividend | J | T | | | | | |
| 85. Thornburg Str. Muni | 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
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.** | 05/09/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 86. J. Hancock Disc Val Mid | A | Dividend | | | Sold | 06/11/24 | J | A | |
| 87. AF Tax Aware Conservative G&I | A | Dividend | K | T | | | | | |
| 88. [redacted]VOYA VA (H) | | | | | | | | | |
| 89. Invesco Equity and Income | | None | K | T | | | | | |
| 90. [redacted]VOYA VA II (H) | | | | | | | | | |
| 91. Invesco Equity and Income | | None | J | T | | | | | |
| 92. [redacted]VOYA VA (H) | | | | | | | | | |
| 93. Invesco Equity and Income | | None | J | T | | | | | |
| 94. [redacted]Prudential VA (H) | | | | | | | | | |
| 95. Prudential Growth | | None | L | T | | | | | |
| 96. Advanced Strategies Portfolio | | None | L | T | | | | | |
| 97. Western Core Plus Bond | | None | L | T | | | | | |
| 98. [redacted]Prudential VA (H) | | | | | | | | | |
| 99. Prudential Growth | | None | L | T | | | | | |
| 100. Advanced Strategites Portfolio | | None | L | T | | | | | |
| 101. Western Core Plus Bond | | None | M | T | | | | | |
| 102. Shares of Community Bacshares of MS, Inc. | E | Dividend | P1 | 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.** | 05/09/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 103. Phoenix Life (Whole Life) | | None | M | T | | | | | |
| 104. Community Bancshares of MS accounts | B | Interest | O | T | | | | | |
| 105. | | | | | | | | | |

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.** | 05/09/2025 |

## 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/ 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
Administrative Office of the United States Courts
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544