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
Limbaugh, Jr, Stephen N.	Eastern District of Missouri	12/11/2024
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 District Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2023 **to** 12/31/2023

7. Chambers or Office Address

Rush Hudson Limbaugh, Sr. U.S. Courthouse
555 Independence St., Suite 400
Cape Girardeau, MO 63703

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.	Member, Board of Trustees	State Historical Society of Missouri
2.	Member, Board of Directors	McKendree Chapel Memorial Association
3.	Member, Board of Directors	Southeast Missouri Symphony Advisory Board
4.	Member, Board of Directors	Kellerman Foundation for Historic Preservation
5.	Member, Board of Directors	U.S. Grant Trail Association
6.	Lay Leader	Centenary Methodist Church of Cape Girardeau
7.		
8.		
9.		

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.		
2.		

Name of Person Reporting	Date of Report
Limbaugh, Jr, Stephen N.	12/11/2024

3.

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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. 2023	Missouri State Judicial Retirement System	$121,995.54
2. 2023	Judicial Retirees & Survivors	$222,861.25
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	Wells Fargo Advisors, salary and bonuses and deferred compensation
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.	Montgomery Bank	Promissory Notes	L
2.			
3.			
4.			
5.			

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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. Wells Fargo IRA - [redacted](H)									
2. -Bank Sweep Deposit	A	Interest	J	T					
3. -Homestreet Bank CD	A	Interest			Matured	01/03/23	K		
4. -Customers Bk CD	A	Interest			Matured	02/22/23	M		
5. -East-West Bk CD	C	Interest			Matured	03/30/23	L		
6. -Charles Schwab Bk CD	B	Interest	K	T	Buy	01/11/23	K		
7. -Charles Schwab Bk CD	D	Interest	L	T	Buy	03/02/23	L		
8. -UBS Bank CD	C	Interest	L	T	Buy	01/11/23	L		
9. -Comenity Capital Bank CD	D	Interest	J	T	Buy	03/02/23	J		
10. -Univest Bank & Tr Co CD	B	Interest	K	T	Buy	03/23/23	K		
11. -First Natl Bnk PA Cd	B	Interest			Matured	07/06/23	K		
12. -Mizrahi Tefahot Bank CD	A	Interest	K	T	Buy	09/29/23	K		
13. -BSFIX - Barron Invt Funds Trust Small Cap Fudn		None	J	T					
14.					Sold (part)	07/26/23	J		
15. -DODGX - Dodge and Cox Stk Fund	A	Dividend	J	T					
16.					Sold (part)	07/26/23	J		
17. -TQMIX - AMG Timesquare Mid Cap Growth FD CL I	A	Dividend	J	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		

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.)*

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18.					Sold (part)	07/26/23	J		
19. -ABNFX - American Funds The Bond Fund of America Class F2	A	Dividend	J	T					
20.					Sold (part)	07/26/23	J		
21. -FTIXX - Goldman Sachs Tr Final Square Tres Instl Cl	A	Dividend	J	T					
22.					Buy	07/26/23	J		
23.					Buy	07/27/23	J		
24.					Sold (part)	07/26/23	J		
25. -AGTHX - Growht Fund of America Cl A	A	Dividend	M	T					
26. -GFFFX - American Funds Growth Fund of America CL F2	A	Dividend	K	T					
27.					Buy	07/26/23	J		
28. -NFFFX - American Funds New World Fund Cl F2	A	Dividend	J	T					
29.					Sold (part)	07/26/23	J		
30. -WMFFX - American Funds Washington Mutual FD F2	A	Dividend	K	T					
31.					Buy	07/26/23	J		
32. -AIVSX - Investmetn Co America Class A	B	Dividend	M	T					
33. -AEPFX - Americna Funds Europacific Growth Fund Clas F2	A	Dividend	J	T					
34.					Sold (part)	07/26/23	J		

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35. -ODVYX - Invesco Developing Markets Fund Class Y	A	Dividend	J	T					
36.					Sold (part)	07/26/23	J		
37. -JENIX - Jensen Portfolio Inc Class I	A	Dividend	J	T					
38.					Sold (part)	07/26/23	J		
39. -JVMIX - John Hancock Funds III Diciplined Value Mid Cap Fd CL 1	A	Dividend	J	T					
40.					Sold (part)	07/26/23	J		
41. -PCLIX - Pimco Commidities Plus Strategy FD CL Institutional	A	Dividend	J	T					
42.					Buy	07/26/23	J		
43. -PEBIX - Pimco FDS Invt Mgmt Ser Emerging Markets BD FD Instl Cl	A	Dividend	J	T					
44.					Sold (part)	07/26/23	J		
45. -PCRIX - Commodityrealreturn Strat FD Instl Cl Shs	A	Dividend	J	T					
46.					Buy	07/26/23	J		
47. -TROSX - T Rowe Price Intl Fd Overseas Stk Fd	A	Dividend	J	T					
48.					Buy	07/26/23	J		
49. -VSOIX - Victory Sycamore Small Co Oppty Fd	A	Dividend	J	T					
50.					Buy	07/26/23	J		
51. -GOOG - Alphabet Inc		None	J	T					

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52. -COP - Connoco Phillips	A	Dividend	J	T					
53. -MDT - Medtronic	A	Dividend	J	T					
54. -QCOM - Qualcomm inc	A	Dividend	J	T					
55. -SPY- Spdr S&P 500 Truxt	B	Dividend	M	T					
56. -UPS - United Parcel Service	A	Dividend	J	T					
57. -WFC - Wells Fargo Co NEW	A	Dividend	J	T					
58.									
59.									
60. Wells Fargo Acct - [redacted] Revocable Trust [redacted] Trustees (H)									
61. -Wells Fargo Bank - Deposit Sweep Acct	A	Interest	J	T					
62. -AMZN - Amazon Com Inc		None	K	T					
63. -AMGN - Amgen Inc	A	Dividend	K	T					
64. -AAPL - Apple Inc	A	Dividend	L	T					
65. -CAT - Caterpillar Inc	A	Dividend	J	T					
66. -CI - Cigna Corp New	A	Dividend	J	T					
67. -DIS - Disney Walt Company		None	J	T					
68. -ISRG - Intutive Surgical Inc Com New		None	J	T					

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69. -JPM - Jpmorgan Chase & Co	A	Dividend	J	T					
70. -MCD - McDonalds Corp	A	Dividend	K	T					
71. -MRK - Merck & Co Inc New	A	Dividend	J	T					
72. -MSFT - Microsoft Corp	A	Dividend	K	T					
73. -OGN - Organon & Co	A	Dividend	J	T					
74. -PEP - Pepsico Inc	A	Dividend	K	T					
75. -PG - Proctor and Gamble Co	A	Dividend	J	T					
76. -TSLA - Tesla Inc		None	J	T					
77. -UNP - Union Pacific Cop	A	Dividend	J	T					
78. -WFC - Wells Fargo & Co New	A	Dividend	J	T					
79.									
80. WF Performance Award & Deferred Comp Plan-[redacted](H)(See Note 1, VIII)									
81. -Certof Deposit 12 mos	B	Interest	L	T					
82. -S&P 500 Index Fund	C	Dividend	K	T					
83. -State Street Target Retirement NL Fund 2035	C	Dividend	K	T					
84. -State Street Conservative Target Retirement 2035	C	Dividend			Sold	03/31/23	M		
85.									

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86. Wells Fargo 401K Plan [redacted](H)									
87. -Wells Fargo ESOP Fund (See Note 1, Part VIII)	C	Dividend	M	T	Buy (add'l)	12/31/23	K		
88. -Target 2025 FundNL C1 A	C	Dividend	K	T	Buy	01/01/23	K		
89.					Buy (add'l)	04/01/23	J		
90.					Buy (add'l)	07/01/23	J		
91.					Buy (add'l)	10/01/23	J		
92. -State Street Cons Target Ret 2025 NL P	B	Dividend			Sold	01/01/23	K		
93. -Emerging Markets Equity Fund	D	Dividend	K	T					
94. -State Street International Index M	D	Dividend	K	T					
95. -State Street Russell Sm Cap Index NL C1 K	D	Dividend	L	T	Buy (add'l)	01/01/23	J		
96.					Buy (add'l)	04/01/23	J		
97.					Buy (add'l)	07/01/23	J		
98.					Buy (add'l)	10/01/23	J		
99. -State Street S&P Mid Cap Index NL C1 M	D	Dividend	L	T	Buy (add'l)	01/01/23	J		
100.					Buy (add'l)	04/01/23	J		
101.					Buy (add'l)	07/01/23	J		
102.					Buy (add'l)	10/01/23	J		

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103. -Large Cap Growth Fund	E	Dividend	M	T	Buy (add'l)	01/01/23	J		
104.					Buy (add'l)	04/01/23	J		
105.					Buy (add'l)	07/01/23	J		
106.					Buy (add'l)	10/01/23	J		
107. -Large Cap Value Fund	D	Dividend	M	T	Sold (part)	01/01/23	K		
108. -State Street Nasdaq-100 Index NL C1 M	F	Dividend	M	T	Buy (add'l)	01/01/23	K		
109.					Buy (add'l)	04/01/23	J		
110.					Buy (add'l)	07/01/23	J		
111.					Buy (add'l)	10/01/23	J		
112. -State Street S&P 500 Index K	E	Dividend	M	T	Buy (add'l)	01/01/23	J		
113.					Sold (part)	01/01/23	K		
114.					Buy (add'l)	04/01/23	J		
115.					Buy (add'l)	07/01/23	J		
116.					Buy (add'l)	10/01/23	J		
117.									
118. Limbaugh Lands, Inc-[redacted] (See Note 3, part VIII)		None	K	U					
119.									

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
Limbaugh, Jr, Stephen N.	12/11/2024

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. First State Community Bank-[redacted]		None	J	T					
121.									
122. Bank of America-[redacted]		None	K	T					
123.									
124. Wells Fargo Stock Options		None	J	T					
125.									
126. Ameren		None	J	T	Buy	06/01/23	J		
127.									

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
Limbaugh, Jr, Stephen N.	12/11/2024

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

1. Part VII - Line 81-117
Quarterly statements were provided. Acutal dates of transactions are not available

3. Part VII - Line 119
Limbaugh Lands, Inc. owns the 458-acre [redacted] homestead farm in Bollinger County, MO. We own a small undivided interest.

Name of Person Reporting	Date of Report
Limbaugh, Jr, Stephen N.	12/11/2024

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/ Stephen N. Limbaugh, Jr**

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
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