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
Montgomery-Reeves, Tamika R.	U.S. Court of Appeals, Third Circuit	08/15/2025
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**
U.S. Circuit Court Judge (FT)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
405 North King Street Wilmington, Delaware 19801		

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.	Board Member	Delaware Community Foundation
2.	Adjunct Professor	Widener University, Delaware Law School
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.		
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.	2024	Widener University Delaware School of Law, teaching income	$22,500.00
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.	2024	Attorney (self-employed)
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.	University of Georgia Law School	May 17-18, 2024	Athens, GA	Commencement Speaker	Transportation, food, lodging
2.	University of Delaware Law School	May 24-25, 2024	Newark, DE	Honorary Degree	Transportation, food, lodging
3.					
4.					
5.					

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Montgomery-Reeves, Tamika R.	08/15/2025

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.	U.S. Department of Education	Student Loan	J
2.			
3.			
4.			
5.			

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Montgomery-Reeves, Tamika R.	08/15/2025

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. Individual Assets (H)									
2. Bank of America (cash)	A	Interest	L	T					
3. Account #1 (H)									
4. Charles Schwab Bank (cash)	A	Interest	L	T					
5. Schwab S&P 500 Index Fund (SWPPX)	A	Dividend	L	T					
6. T. Rowe Price Growth Stock Fund (PRGFX)	B	Dividend	K	T					
7. Vanguard Small-Cap Index Fund Admiral Shares (VSMAX)	A	Dividend	K	T					
8. Account #2 (H)									
9. Charles Schwab Bank (cash)	A	Interest	K	T					
10. Schwab S&P 500 Index Fund (SWPPX)	A	Dividend	K	T					
11. T. Rowe Price Growth Stock Fund (PRGFX)	B	Dividend	K	T					
12. Vanguard Small-Cap Index Fund Admiral Shares (VSMAX)	A	Dividend	K	T					
13. Account #3 (H)									
14. Dreyfus Government Cash Management (cash eq.) (DGVXX)	A	Dividend	K	T	Sold (part)	01/17/24	J		
15.					Buy (add'l)	03/11/24	L		
16.					Sold (part)	03/13/24	K		
17.					Sold (part)	03/15/24	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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Montgomery-Reeves, Tamika R.	08/15/2025

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.					Sold (part)	03/20/24	K		
19.					Sold (part)	03/22/24	J		
20.					Sold (part)	04/16/24	J		
21.					Buy (add'l)	05/31/24	J		
22.					Sold (part)	07/12/24	J		
23.					Sold (part)	07/16/24	J		
24.					Sold (part)	10/16/24	J		
25.					Sold (part)	11/12/24	J		
26.					Buy (add'l)	11/13/24	K		
27.	Vanguard Treasury Money Market Fund (VUSXX) (cash eq.)	C	Dividend	L	T	Buy (add'l)	03/19/24	K		
28.					Sold (part)	05/29/24	J		
29.					Sold (part)	08/05/24	J		
30.					Buy (add'l)	11/12/24	K		
31.					Sold (part)	12/23/24	J		
32.	U.S. Treasury Note	A	Interest	J	T				
33.	U.S. Treasury Bond (X)	B	Interest	K	T				
34.	BlackRock Enhanced Equity Dividend Trust (BDJ)	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
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3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
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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)	
35. Global X MLP & Energy Infrastructure ETF (MLPX)	A	Dividend	J	T					
36. iShares Core Dividend Growth ETF (DGRO)	B	Dividend	L	T					
37. JPMorgan Equity Premium Income ETF (JEPI)	A	Dividend			Sold	08/19/24	K	B	
38. Pacer U.S. Small Cap Cash Cows 100 ETF (CALF)	A	Dividend	J	T	Buy	07/11/24	J		
39.					Buy (add'l)	11/12/24	J		
40. Pacer U.S. Cash Cows 100 ETF (COWZ)	A	Dividend	L	T	Buy (add'l)	03/11/24	J		
41.					Buy (add'l)	03/20/24	J		
42.					Buy (add'l)	08/05/24	J		
43. SPDR S&P Dividend ETF (SDY)	A	Dividend	K	T					
44. Sprott Physical Gold and Silver Trust (CEF)		None	K	T	Buy (add'l)	03/13/24	J		
45.					Buy (add'l)	11/11/24	J		
46. Vanguard International High Div Yield Index Fund ETF (VYMI)	A	Dividend	J	T	Buy (add'l)	03/11/24	J		
47.					Buy (add'l)	12/23/24	J		
48. Vanguard Equity-Income Fund Admiral Shares (VEIRX)	D	Dividend	M	T					
49. Vanguard Mega Cap Value Index Fund ETF (MGV)	B	Dividend	L	T	Buy (add'l)	03/11/24	J		
50. Tortoise Energy Infrastructure and Income Fund Class Instl (INFIX)	B	Dividend	K	T	Buy (add'l)	03/19/24	J		
51. PIMCO Income Fund Institutional Class (PIMIX)	D	Dividend	M	T	Buy (add'l)	03/19/24	J		

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2. Value Codes (See Columns C1 and D3)
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52.						Buy (add'l)	08/19/24	K		
53.						Buy (add'l)	11/12/24	K		
54.	Account #4 (H)									
55.	American Funds American Balanced Fund Class C (BALCX)	B	Dividend	K	T					
56.	First Eagle Global Fund Class A (SGENX)	A	Dividend	J	T					
57.	First Eagle Global Fund Class C (FESGX) (Y)									
58.	Account #5 (H)									
59.	American Funds American Balanced Fund Class C (BALCX)	B	Dividend	K	T					
60.	First Eagle Global Fund Class A (SGENX)	A	Dividend	J	T					
61.	Account #6 (H)									
62.	HSBC Bank (cash)	A	Interest	J	T					
63.	Vanguard Treasury Money Market Fund (VUSXX) (cash eq.)	D	Dividend	M	T	Sold (part)	03/04/24	J		
64.						Buy (add'l)	03/20/24	M		
65.						Sold (part)	04/02/24	K		
66.						Buy (add'l)	04/18/24	J		
67.						Sold (part)	08/05/24	K		
68.						Sold (part)	12/23/24	J		

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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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69. U.S. Treasury Notes	C	Interest	L	T					
70. U.S. Treasury Bond (X)	C	Interest	L	T					
71. BlackRock Enhanced Equity Dividend Trust (BDJ)	A	Dividend	J	T					
72. Global X MLP & Energy Infrastructure ETF (MLPX)	B	Dividend	K	T					
73. iShares Core Dividend Growth ETF (DGRO)	C	Dividend	M	T					
74. Pacer U.S. Small Cap Cash Cows 100 ETF (CALF)	A	Dividend			Buy	04/02/24	K		
75.					Buy (add'l)	04/12/24	K		
76.					Buy (add'l)	08/02/24	K		
77.					Buy (add'l)	08/05/24	K		
78.					Sold	12/23/24	L		
79. Pacer U.S. Cash Cows 100 ETF (COWZ)	B	Dividend	M	T	Buy (add'l)	03/11/24	K		
80.					Buy (add'l)	03/20/24	K		
81.					Buy (add'l)	04/12/24	K		
82.					Buy (add'l)	08/05/24	K		
83.					Buy (add'l)	12/23/24	L		
84. SPDR S&P 500 ETF Trust (SPY)	B	Dividend	M	T					
85. SPDR S&P Dividend ETF (SDY)	C	Dividend	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	
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☐ NONE *(No reportable income, assets, or transactions.)*

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86. SPDR Portfolio S&P 500 High Dividend ETF (SPYD)	A	Dividend	K	T					
87. Sprott Physical Gold and Silver Trust (CEF)		None	L	T	Buy (add'l)	03/13/24	K		
88.					Buy (add'l)	11/11/24	J		
89. Vanguard International High Div Yield Index Fund ETF (VYMI)	B	Dividend	K	T	Buy (add'l)	03/11/24	K		
90.					Buy (add'l)	12/23/24	J		
91. Vanguard Equity-Income Fund Admiral Shares (VEIRX)	D	Dividend	L	T					
92. Vanguard Mega Cap Value Index Fund ETF (MGV)	D	Dividend	N	T	Buy (add'l)	03/11/24	K		
93.					Buy (add'l)	03/19/24	K		
94.					Buy (add'l)	04/02/24	K		
95.					Buy (add'l)	04/12/24	K		
96.					Buy (add'l)	04/15/24	K		
97. Tortoise Energy Infrastructure and Income Fund Class Instl (INFIX)	C	Dividend	L	T	Buy (add'l)	03/19/24	J		
98. American Funds High-Income Municipal Bond Fund Class F-3 (HIMFX)	B	Dividend	K	T					
99. First Eagle High Yield Mun Cl I (FEHIX)	C	Dividend	L	T	Buy	03/04/24	K		
100.					Buy (add'l)	03/19/24	K		
101.					Buy (add'l)	03/22/24	K		
102. PIMCO Total Return Fund Institutional Class (PTTRX)	A	Dividend			Sold	03/04/24	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
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H1 =$1,000,001 - $5,000,000
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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
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3. Value Method Codes (See Column C2)
Q =Appraisal
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103. PIMCO Income Fund Institutional Class (PIMIX)	E	Dividend	N	T	Buy (add'l)	03/19/24	M		
104.					Buy (add'l)	03/22/24	K		
105. Vanguard Short Term Treasury Admiral CL (VFIRX)	C	Dividend	M	T	Buy (add'l)	03/28/24	K		
106. Roche Holding AG ADR (RHHBY)		None			Buy	03/26/24	K		
107.					Sold	03/28/24	K	A	
108. Account #7 (H)									
109. BlackRock Balanced Direct		None	J	T					
110. BlackRock Equity Index Direct College		None	J	T					
111. BlackRock 2038 Enroll D		None	K	T					
112. iShares 2038 Enroll D		None	K	T					
113. Account #8 (H)									
114. Scholar's Edge 2032-2033 Portfolio A		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
Montgomery-Reeves, Tamika R.	08/15/2025

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

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value.

Name of Person Reporting	Date of Report
Montgomery-Reeves, Tamika R.	08/15/2025

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/ Tamika R. Montgomery-Reeves

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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