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
Rose, Thomas M.	U.S. District Ct., S.D. Ohio	07/07/2025
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. District Judge (senior status)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
200 West Second Street 9th Floor, Federal Building Dayton, OH 45402		

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.	Partner (Thru September 2024/Partnership dissolved)	Rose and Buerger Farms LLP (Dissolved in October 2024-No longer in existence)
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.	1976	Public Employees Retirement System, no control, retirement
2.	2005	Northwestern Mutual Individual retirement account - self directed (rolled from Ohio Deferred Comp Fund)
3.		

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Rose, Thomas M.	07/07/2025

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. 2024	Ohio Public Employee Retirement System (Retirement)	$102,805.00
2. 2024	Northwestern IRA Distribution (RMD)	$21,000.00
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	Ohio Public Employment Retirement System (Retirement as Greene County Ohio Clerk of Courts)
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
Rose, Thomas M.	07/07/2025

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.	Energy Select SPDR ETF	A	Dividend	J	T					
2.	Chillicothe Ohio School Bonds	A	Dividend			Redeemed	12/18/24	J	A	
3.	Akron OH G.O. Bond	A	Dividend	J	T					
4.	American Muni Power	A	Dividend	K	T					
5.	Cincinnati, OH Economic Dev Bonds [redacted]	A	Dividend	J	T					
6.	Cincinnati, OH Urban Redev Bonds [redacted]	A	Dividend	J	T					
7.	Warrenville Heights Bonds	A	Dividend	K	T					
8.	Key Bank	A	Dividend	J	T					
9.	Columbus, OH G.O. Bonds (4/32)	A	Dividend	K	T					
10.	Carnival Cruise Lines	A	Dividend	J	T					
11.	Ford Motor	A	Dividend			Buy (add'l)	07/05/24	J		
12.						Buy (add'l)	07/18/24	J		
13.						Buy (add'l)	07/18/24	J		
14.						Sold	08/07/24	J	A	
15.	Boeing Co. Common Stock	A	Dividend	L	T	Sold (part)	10/09/24	J	A	
16.	Thornburg Value Fund Class A Re/Re/Re [redacted]	A	Dividend	L	T					
17.	Thornburg Invest. Income Class A [redacted]	C	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
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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
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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.	Johnson and Johnson	A	Dividend	K	T					
19.	Caterpillar	B	Dividend	K	T					
20.	Facebook Common Stock NKA Meta Platforms	A	Dividend	K	T					
21.	Cisco	B	Dividend	K	T					
22.	Vanguard Dividend Appreciation ETF(See VIII)	A	Dividend	K	T					
23.	SPDR Emerging Markets Portfolio ETF (See VIII)	A	Dividend	J	T					
24.	Corteva	A	Dividend	J	T	Buy (add'l)	10/09/24	J		
25.	Timkin	A	Dividend	K	T					
26.	Akamai	A	Dividend	K	T					
27.	Dow Dupont, Inc. FKA Dow Chemical	A	Dividend	K	T	Buy (add'l)	10/09/24	J		
28.	Campbell Soup	A	Dividend	J	T					
29.	Target Corp	A	Dividend	J	T					
30.	TJX	A	Dividend	K	T					
31.	Astrazeneca	A	Dividend	J	T					
32.	Moderna	A	Dividend			Sold	10/09/24	J	A	
33.	Honeywell Inter	A	Dividend	K	T					
34.	Fidelity Advisor New Insights Fund Class FINSX	A	Dividend	K	T	Sold (part)	04/08/24	J	A	

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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		
	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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35.						Sold (part)	11/11/24	J	A	
36.	Am.New World Fund Class F-2 NFFFX	A	Dividend	J	T	Sold (part)	11/11/24	J	A	
37.	Deutsche (DWS) Ehance Commodity Strategy Fund Inst.	A	Dividend	J	T					
38.	The Oakmark International Fund OAKIX	A	Dividend	K	T					
39.	MFS Value Fund Class MEIIX	A	Dividend	K	T	Sold (part)	11/11/24	J	A	
40.	Marion Cty Ohio Helth Fac. Bond	A	Dividend	K	T					
41.	Northern Small Cap Value Fund	A	Dividend			Sold	01/30/24	J	A	
42.	Pimco Income Fund Class PONPX	A	Dividend	J	T					
43.	AmEuropacific Growth Fund AM IOMS	A	Dividend	K	T					
44.	Principal Real Estate Securities	A	Dividend	K	T					
45.	Barron Asset Fund	A	Dividend			Sold	01/30/24	J	A	
46.	Goldman Sachs Int Sm Cap Investor GICIX	A	Dividend	J	T					
47.	TIAA - CREF Bond Advisor	A	Dividend	K	T					
48.	Dodge & Cox Income Fund	B	Dividend	K	T	Buy (add'l)	04/09/24	J		
49.	John Hancock Discp Fund	A	Dividend			Sold	01/30/24	J	A	
50.	Mahoning Co. Swr System Bond	A	Dividend	K	T					
51.	County of Hamilton GO Bond	A	Dividend	K	T					

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52.	Franklin, Ohio Warren Cty School Bond	A	Dividend	K	T					
53.	Ohio State Hosp Fac (Cleve. Clinic)Rev Bond	A	Dividend	K	T					
54.	Chillicothe Hosp (Adena)Fac Bond	A	Dividend	J	T					
55.	Lancaster, Ohio City School Bonds	A	Dividend	J	T					
56.	Hamilton Co. Hsp (UC Health) Bond	A	Dividend	K	T					
57.	Lorain Oh G.O. Bond	A	Dividend			Redeemed	12/02/24	K	A	
58.	Upper Arlington Sch Bonds	A	Dividend	K	T					
59.	Burkshire Hathaway BRKB	A	Dividend	M	T					
60.	Little Miami Ohio Loc Sch Bonds	A	Dividend	K	T					
61.	Carlyle Group LP CG	A	Dividend	J	T					
62.	Ohio St Higher Education Fac Com 1/42	A	Dividend	J	T					
63.	Thurston Springer fka Boenning and Scattergood	C	Interest	L	T					
64.	Rose and Buerger Farms LLP	A	Distribution			Distributed	10/04/24	J	A	
65.	Goldman Sachs Large Caps GSLC	A	Dividend	K	T	Sold (part)	04/08/24	J	A	
66.						Sold (part)	11/11/24	J	A	
67.	Ishare Tr MSCI USA Value Factor ETF (VLUE)	A	Dividend	J	T					
68.	IshareTR20+Treasury Bonds TLT	A	Dividend	K	T	Buy	06/24/24	K		

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69.	Western Asset Core Bond Fund Class 1	A	Dividend	K	T	Sold (part)	06/24/24	J	A	
70.						Sold (part)	09/03/24	J	A	
71.	Keycorp Perf Ser E Bond	A	Dividend	J	T					
72.	NM FDIC Insured Deport Program	A	Dividend	J	T					
73.	Greif Inc. CLA GEF	A	Dividend	J	T					
74.	Advance Micro Device	A	Dividend	J	T					
75.	Salesforce	A	Dividend	K	T					
76.	Verizon	A	Dividend			Sold	12/17/24	J	A	
77.	Walt Disney	A	Dividend			Sold	07/22/24	J	A	
78.	Blackrock Sys Inst. Fund BSIIX	A	Dividend	K	T					
79.	General Electric	A	Dividend	J	T					
80.	Amazon	A	Dividend	K	T	Buy (add'l)	07/18/24	J		
81.						Buy (add'l)	08/19/24	K		
82.	Blackrock Income Fund BIMBX	A	Dividend	J	T					
83.	Montgomery Co. Hosp. Rev. Facs Bond	A	Dividend	J	T					
84.	Westbanco Inc	B	Dividend	K	T					
85.	Hamilton Co Conv Fac Bond	B	Dividend			Redeemed	05/24/24	K	A	

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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
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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86. GE Healthcare Tech Inc.	A	Dividend			Buy (add'l)	08/01/24	J		
87.					Sold	12/16/24	J	A	
88. Cuyahoga Falls Sch Bond	A	Dividend	K	T					
89. State of Ohio Hosp (Univer. Hosp.)Rev Bond	A	Dividend	J	T					
90. American Electric Power	A	Dividend	J	T					
91. AGR Diversified Fund aka AQR	A	Dividend	J	T					
92. John Hancock Diversified (JDIX)	A	Dividend	J	T					
93. Ishares ESG ETF EAGG	A	Dividend			Sold	06/25/24	J	A	
94. Fidelity Advisor Focus Emerging Market Fund FIMIKS	A	Dividend	J	T	Sold (part)	06/24/24	J	A	
95. XLU Utilities Select Sector ETF	A	Dividend	J	T	Buy	01/29/24	J		
96. Investco Exchange RSP	A	Dividend	J	T	Buy	04/10/24	K		
97. Column MidCap Fund CFMCX	A	Dividend	J	T	Buy	01/30/24	J		
98.					Sold (part)	11/11/24	J	A	
99. Column Small Cap Fund CFSLX	A	Dividend	J	T	Buy	01/30/24	J		
100. Nextracker	A	Dividend			Buy	08/07/24	J		
101.					Sold	10/21/24	J	A	
102. Wells Fargo	A	Dividend	J	T	Buy	08/07/24	J		

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103.					Buy (add'l)	10/09/24	J		
104. FMX Fomento Economico	A	Dividend			Buy	08/07/24	J		
105.					Sold	11/26/24	J	A	
106. GEHC Healthcare	A	Dividend			Buy	08/01/24	J		
107.					Sold	12/18/24	J	A	
108. Ohio State Higher Ed. Health Systems (John Carroll)	A	Dividend	K	T	Buy	08/02/24	K		
109. Dover	A	Dividend	J	T	Buy	08/30/24	J		
110. Columbus Oh Met. Housing Bonds	A	Dividend	K	T	Buy	12/17/24	K		
111. Coterra CTRA	A	Dividend			Buy	10/07/24	J		
112.					Sold	10/18/24	J	A	
113. GE Vernova GEV	A	Dividend	J	T	Spinoff (from line 79)	04/04/24	J		
114. New Americn Bond Fund ABNFX	A	Dividend	J	T	Buy	09/03/24	J		
115. US Bank cash accounts (X)	B	Interest	N	T					
116. Wright Patterson Credit Union cash account (X)	A	Interest	K	T					
117. Virginia 529-ACollege AmericaCapital Growth and Income Fund(X)SeeVIII	G	Interest	P1	T					
118.									

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
Rose, Thomas M.	07/07/2025

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

Explanatio on Lines 115,116 and 117. These personal cash accounts were mistakenly omitted from previous reports.
This Amended Report for 2024 contains a more detailed description of the assets in lines 22 and 23, as well as 117, as directed in the July 1,2025 correspondence from the Judicial Conference of the United States Committee on Financial Disclosure.

Name of Person Reporting	Date of Report
Rose, Thomas M.	07/07/2025

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/ Thomas M. Rose

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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Washington, D.C. 20544