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
Schroeder, Thomas D.	Middle District of N C	05/15/2025
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**
US District Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
251 North Main Street, Suite 223A Hiram Ward Federal Courthouse Winston-Salem, North Carolina 27101		

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 and Past President	[redacted]
2.	Board Member	Chief Justice Joseph Branch Inn of Court
3.	Power of Attorney (Business Management)	POA #1
4.	Power of Attorney (Health Care)	POA #2
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.			
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.		
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
Schroeder, Thomas D.	05/15/2025

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.	Wells Fargo Bank Accounts	A	Interest	K	T					
2.	US Treasury Series EE Bonds		None	J	T					
3.	First Horizon Bank Accounts	A	Interest			Merged (with line 14)	04/12/24	M		
4.	Valic Income Fixed Plus Annuity	B	Dividend	K	T					
5.	Brokerage #1 (H)									
6.	-Invesco FTSE RAFI US 1000 ETF	C	Dividend	M	T					
7.	-Inveso FTSE RAFI US 1500 Small-Mid ETF	A	Dividend	L	T					
8.	-Vanguard FTSE Developed Markets ETF	D	Dividend	M	T					
9.	-Vanguard FTSE Emerging Markets ETF	B	Dividend	L	T					
10.	-Calamos Market Neutral Income I	C	Dividend	M	T					
11.	-Eaton Vance Glbl Macro Absolute Ret Advtg I	D	Dividend	M	T					
12.	-iShares TIPS Bond ETF	C	Dividend	M	T					
13.	-Vanguard Short-Term Bond ETF	C	Dividend	M	T					
14.	-Fidelity Government Cash Reserve "Cash Account"	A	Dividend	J	T					
15.	-Fidelity Government Money Market Fund "Cash Account"	C	Dividend			Buy	04/12/24	M		
16.						Sold	11/15/24	M	A	
17.	-Fidelity Gov't Money Market Premium Class "Cash Account"	A	Dividend	M	T	Buy	11/15/24	M		

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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Schroeder, Thomas D.	05/15/2025

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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. Brokerage #3 (H)									
19. -Invesco FTSE RAFI US 1000 ETF	D	Dividend	O	T					
20. -iShares Russell 1000 ETF	D	Dividend	N	T					
21. -Inveso FTSE RAFI US 1500 Small-Mid ETF	B	Dividend	M	T					
22. -iShares MSCI EAFE ETF	D	Dividend	N	T					
23. -Vanguard FTSE Emerging Markets ETF	D	Dividend	M	T	Buy (add'l)	09/12/24	J		
24. -Calamos Market Neutral Income I	A	Dividend	J	T					
25. IRA #1 (H)									
26. -Vanguard FTSE Emerging Markets ETF	A	Dividend	J	T					
27. -PIMCO All Asset All Authority Instl	C	Dividend	M	T					
28. -RiverNorth/DoubleLine Strategic Income I	A	Dividend	J	T					
29. -iShares Treasury Floating Rate ETF	B	Dividend	K	T					
30. -Fidelity Government Cash Reserve "Cash Account"	A	Dividend	J	T					
31. IRA #2 (H)									
32. -Eaton Vance Glbl Macro Absolute Ret Advtg I	A	Dividend	J	T					
33. -iShares Treasury Floating Rate Bond ETF	A	Dividend	K	T	Sold (part)	09/11/24	J		
34. -Fidelity Government Cash Reserve "Cash Account"	A	Dividend	J	T					

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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
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35. IRA #3 (H)									
36. -Invesco FTSE RAFI US 1000	C	Dividend	M	T					
37. -Inveso FTSE RAFI US 1500 Small-Mid ETF	B	Dividend	M	T					
38. -iShares Core MSCI Intl Developed Markets ETF	B	Dividend	K	T					
39. -Vanguard FTSE Developed Markets ETF	B	Dividend	L	T					
40. -iShares Core MSCI Emerging Markets ETF	A	Dividend	K	T					
41. -Vanguard FTSE Emerging Markets ETF	C	Dividend	L	T					
42. -PIMCO All Asset All Authority Instl	B	Dividend	K	T					
43. -AQR Managed Futures Strategy Cl I	D	Dividend	M	T					
44. -AQR Style Premia Alternative Cl I	D	Dividend	M	T					
45. -Eaton Vance Glbl Macro Absolute Ret Advtg I	A	Dividend	J	T					
46. -Eaton Vance Emerging Markets Local Income Cl I	E	Dividend	M	T					
47. -RiverNorth/DoubleLine Strategic Income I	D	Dividend	M	T					
48. -iShares Treasury Floating Rate Bond ETF	D	Dividend	M	T					
49. -Fidelity Government Cash Reserve "Cash Account"	A	Dividend	K	T					
50. Mass Mutual Whole Life Insurance	C	Dividend	M	T					
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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
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2. Value Codes (See Columns C1 and D3)
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52. Loyal American Insurance (see part VIII)	A	Dividend	J	W					
53. Duke University Faculty Retirement Plan (H)									
54. -Vanguard Instl. Target Retirement 2025	A	Interest			Merged (with line 30)	05/30/24	J		

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

Part VII:

Line 52: The Loyal American Life Insurance Company policy appears to have been affiliated with and/or administered byThe Great American Life Insurance Company, which was acquired by Mass Mutual Ascend Life Insurance Company in 2022. This is a Whole Life policy.

Name of Person Reporting	Date of Report
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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 D. Schroeder

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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