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
Smith, Jr., Charles L.	Northern District of Alabama	06/10/2025
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		
United States Courthouse 101 Holmes Avenue Huntsville, Ala. 35801		

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.	Trustee	Alabama Department of Archives and History
2.	Director	Friends of Alabama Heritage Magazine Foundation
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.	1981	Judicial Retirement Fund of Alabama (Retirement fund of former employer, State of Alabama), no control
2.	1981	Madison County, Alabama Retirement Fund (Retirement fund of former employer, Madison County), no control
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	State of Alabama Judicial Retirement (Retirement Systems of Alabama)	$58,725.00
2. 2024	Madison County, Alabama Retirement	$19,142.00
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	Madison County, Alabama Retirement Fund (Retirement Systems of Alabama)
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
Smith, Jr., Charles L.	06/10/2025

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		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
1.	U.S. Savings Bonds-Series EE	A	Interest	J	T					
2.	Morgan Stanley Account (H)									
3.	-- Morgan-Stanley Private Bank	A	Interest	J	T					
4.	-- MSBNA Preferred Savings	A	Interest	J	T					
5.	-- Federated Prime Cash Obligations WS	D	Dividend	M	T					
6.	-- Albertsons Companies Inc.	B	Dividend	J	T					
7.	-- Pfizer Inc.	A	Dividend	K	T					
8.	-- Alphabet Inc CLA	A	Dividend	K	T	Buy	02/07/24	J		
9.	-- Amazon Com Inc.	A	Dividend	K	T	Buy	02/07/24	K		
10.	-- Nvidia Corporation	A	Dividend	M	T	Buy	02/07/24	L		
11.	Regions Bank Account	A	Interest	K	T					
12.	Bryant Bank Account	A	Interest	J	T					
13.	Meadowbrook, Ltd. 4.75% Int. in limited partnership		None	J	U					
14.	Farm: Madison County, AL	B	Rent (Crop)	O	W					
15.	Farm Rental House: Madison County, AL	D	Rent	M	W					
16.	Rental House: Huntsville, AL	E	Rent	O	W					
17.	Crown Life Ins. - Cash Value Whole Life Policy	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

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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. Nationwide § 457(b) Deferred Comp Account (H):									
19. -- Fidelity Contrafund	D	Dividend	L	T					
20. Stone X Traditional IRA (H):									
21. -- Sterne Agee Insured Deposit Program	A	Interest	J	T					
22. -- Valley View Place LLC		None	N	T					
23. -- Qual Comm Inc.	A	Dividend	K	T					
24. -- Leidos Holdings Inc.	A	Dividend	K	T					
25. Madison Co. AL Retirement Fund	B	Interest	K	T					
26. Am Family Broadcasting Corp (Retirement)		None			Sold	12/02/24	M		See explanation Part VIII
27. Morgan-Stanley Traditional IRA (H)									
28. -- Regions Financial Corp. Common	B	Dividend	K	T					
29. -- Apple, Inc. Common	D	Dividend	P1	T					
30. -- Clorox Co. Common	C	Dividend	M	T					
31. -- Meta Platforms Inc. CL A Common	A	Dividend	L	T					
32. -- Walt Disney Common	B	Dividend	K	T					
33. -- Morgan-Stanley Private Bank	A	Interest	J	T					
34. -- Federated Prime Cash Obligations WS	C	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

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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. -- Pfizer Inc.	A	Dividend			Sold	06/20/24	J		
36. Roth IRA No. 3 (H)									
37. -- Apple Inc. Common	A	Dividend	K	T					
38. -- Coca-Cola Bottling Co. Common	A	Dividend	J	T					
39. -- Ford Motor Co. New	A	Dividend	J	T					
40. -- Albertsons Companies, Inc.	A	Dividend	J	T					
41. -- Ameriwest Lithium Inc.		None	J	T					
42. -- Discovery Lithium Inc.		None	J	T					
43. -- CVS Health Corp Common	A	Dividend	J	T					
44. -- Regions Financial Corp. Common	A	Dividend	J	T					
45. -- Federated Prime Cash Obligations WS	A	Dividend	J	T					
46. -- Pfizer Inc.	A	Dividend	J	T					
47. PACT (Ala. Prepaid Affordable College Tuition plan)		None	K	T					
48. Scholars Choice (Section 529 Plan) (H)									
49. -- NUVEEN CO ALL EQ ALLOC PTF A	C	Dividend	K	T					
50. Vanguard Age-Based Aggressive Growth (Section 529 Plan aka Upromise)	A	Dividend	J	T					
51. Alabama College Counts 529 Plan (H):									

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2. Value Codes (See Columns C1 and D3)
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52. -- Vanguard Growth Index Fund	D	Dividend	M	T					
53. -- Vanguard Total Bond Market Index Fund	B	Dividend	K	T					
54. -- Vanguard Short Term bond Index Fund	B	Dividend	K	T					
55. -- Bank Savings 529 Portfolio	A	Interest	J	T					
56. Education IRA No. 1 (H):									
57. -- Morgan Stanley Bank NA	A	Interest	J	T					
58. -- Meta Platforms Inc. CL A Common	A	Dividend	K	T					
59. -- Apple, Inc. Common	A	Dividend	L	T					
60. -- SNAP, Inc. Class A		None	J	T					
61. -- CVS Health Corp Common	A	Dividend	J	T					
62. -- Tanger Factory Outlet Centers	A	Dividend	J	T					
63. -- Federated Prime Cash Obligations WS	A	Dividend	J	T					
64. -- Ameriwest Lithium Inc.		None	J	T					
65. -- Discovery Lithium Inc.		None	J	T					
66. Trust No. 1 (H):									
67. -- Morgan Stanley Bank NA	A	Interest	K	T					
68. -- Meta Platforms Inc. CL A Common	A	Dividend	L	T					

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69. -- Illumina Inc. Common		None	J	T					
70. -- Apple Inc. Common	B	Dividend	M	T					
71. -- CVS Health Corp Common	A	Dividend			Sold	06/20/24	J		
72. -- Ford Motor Co New	A	Dividend	J	T					
73. -- Tanger Factory Outlet Centers	A	Dividend	J	T					
74. -- Qual Comm Inc.	A	Dividend	J	T					
75. -- Pfizer Inc.	A	Dividend			Sold	06/20/24	J		
76. -- Franklin Federal Tax Free Income FD Class A	A	Interest	K	T					
77. -- Chargepoint Holdings Inc.		None	J	T					
78. -- Lithium Americas Corp.		None	J	T					
79. -- Ameriwest Lithium Inc.		None	J	T					
80. -- Discovery Lithium Inc.		None	J	T					
81. -- Federated Prime Cash Obligations WS	A	Interest	K	T					
82. -- Nexstar Media Group Inc.	B	Dividend	K	T					
83. -- Paramount Global Class B	A	Dividend	J	T	Buy (add'l)	06/20/24	J		
84. -- Alphabet Inc. CLA	A	Dividend	K	T	Buy	02/05/24	J		
85. -- Amazon Com Inc	A	Dividend	J	T	Buy	02/05/24	J		

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86. -- Nividia Corporation		None	K	T	Buy	06/20/24	K		
87. Roth IRA No. 2 (H):									
88. -- Morgan Stanley Bank NA	A	Interest	J	T					
89. -- SNAP, Inc. Class A		None	J	T					
90. -- Tanger Factory Outlet Centers	A	Dividend	J	T					
91. -- Federated Prime Cash Obligations WS	A	Dividend	J	T					
92. -- Albertsons Companies, Inc.	A	Dividend	J	T					
93. -- Pfizer Inc. CL A	A	Dividend	J	T					
94. -- Ameriwest Lithium Inc.		None	J	T					
95. -- Discovery Lithium Inc.		None	J	T					
96. -- Chargepoint Holdings Inc.		None	J	T					
97. Education IRA No. 2 (H):									
98. -- Morgan Stanley Bank NA	A	Interest	J	T					
99. -- Meta Platforms Inc. CL A Common	A	Dividend			Sold	05/17/24	J	A	
100. -- Ford Motor Co New	A	Dividend			Sold	05/17/24	K	D	
101. -- Federated Prime Cash Obligations WS	A	Dividend			Closed	05/17/24	J	A	
102. Education IRA No. 5 (H):									

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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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103. -- Morgan Stanley Bank NA	A	Interest	J	T					
104. -- Meta Platforms Inc. CL A Common	A	Dividend	K	T					
105. -- SNAP, Inc. Class A		None			Sold	06/20/24	J	A	
106. -- Ford Motor Co New	A	Dividend	J	T					
107. -- Tanger Factory Outlet Centers	A	Dividend			Sold	06/20/24	J	A	
108. -- Albertsons Companies, Inc.	A	Dividend			Sold	06/20/24	J	A	
109. -- Pfizer Inc.	A	Dividend			Sold	06/20/24	J	A	
110. -- Ameriwest Lithium Inc.		None	J	T					
111. -- Discovery Lithium Inc.		None	J	T					
112. -- Chargepoint Holdings, Inc.		None	J	T					
113. -- Federated Prime Cash Obligations WS	A	Interest	J	T					
114. -- NVIDIA	A	Dividend	K	T	Buy	06/20/24	J		
115. Educational IRA No. 6 (H):									
116. -- Morgan Stanley Bank NA	A	Interest	J	T					
117. -- SNAP, Inc. Class A					Sold	06/20/24	J	A	
118. -- Ford Motor Co New	A	Dividend	J	T					
119. -- Tanger Factory Outlet Centers	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		

Name of Person Reporting	Date of Report
Smith, Jr., Charles L.	06/10/2025

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)	
120. -- Federated Cash Obligations WS	A	Dividend	J	T					
121. -- Albertsons Companies, Inc.	A	Dividend	J	T					
122. -- Pfizer Inc.	A	Dividend			Sold	06/20/24	J	A	
123. -- Chargepoint Holdings, Inc.		None	J	T					
124. -- Apple Inc.	A	Dividend	J	T					
125. -- NVIDIA	A	Dividend	J	T	Buy	06/20/24	J		
126. Roth IRA (H):									
127. -- Morgan Stanley Bank NA	A	Interest	J	T					
128. -- Meta Platforms Inc. CL A Common	A	Dividend	J	T	Sold (part)	06/20/24	J	A	
129. -- Apple Inc. Common	A	Dividend	K	T	Sold (part)	06/20/24	J	A	
130. -- (Same Stock)					Sold (part)	12/17/24	J	A	
131. -- Federated Prime Cash Obligations WS	A	Dividend	J	T					
132. -- Albertsons Companies, Inc.	A	Dividend	J	T					
133. Traditional IRA No. 2 (H)									
134. -- Federated Prime Cash Obligations WS	A	Dividend	M	T	Buy	12/02/24	M		See explanation Part VIII

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.)*

All of the investments remainining in my [redacted] "Education IRA No. 2" Account listed on lines 91-96 of my 2023 Federal Financial Disclosure Report were liquidated on 05/17/2024, and transferred to an Alabama College Counts 529 account that is solely in [redacted] name and controlled by [redacted]. Only one of those investments (i.e., Meta Platforms Inc. CL A Common, listed on line 93) yielded more that $1,000; hence, it was the only transaction that was required to be reported on the Periodic Transaction Report filed on 06/04/2024. (That transaction was reported as "Sold (Part)," because Meta stock was held in other accounts. In hindsight, it may have been correct to report that one transaction as "Sold," since all of the Meta stock in the "Education IRA No. 2" Account was sold on 05/17/2024.)

Re: "American Family Broadcasting Corp (Retirement)" account listed on Line 26 of the present, 2024 Federal Financial Disclosure Report -- My [redacted] accepted a Buyout offer, and rolled all assets in that account over into a required, new, tax-deferred account designated "Traditional IRA No. 2" that is listed on linesw 133 and 134 of the present, 2024 FDR report.

Name of Person Reporting	Date of Report
Smith, Jr., Charles L.	06/10/2025

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/ Charles L. Smith, 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
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