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
Steele, William H.	U.S. District Court, Southern District of Alabama	04/11/2024
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**
U.S. District Judge - Senior	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
7. Chambers or Office Address		
113 St. Joseph Streeet Mobile, AL 36602		

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.		
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.		
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. 2023	First Church of Christ Scientist (reader fees)	$1,010.00
2. 2023	Self-employed (musician)	$1,230.00
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. 2023	Retirement Systems of Alabama - pension
2. 2023	Nationwide Retirement Solutions- deferred pay & retirement
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
Steele, William H.	04/11/2024

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)	
1.	Individual Assets (H)									
2.	Regions Bank (cash)	A	Interest	K	T					
3.	American Express High Yield Savings (cash)	A	Interest	L	T					
4.	Nationwide Retirement Solutions (457b)	B	Dividend	M	T					
5.	John Hancock Survivorship Universal Life Insurance	D	Interest	M	T					
6.	Rental property #1, Orange Beach, AL	E	Rent	N	W					
7.	Acccount #1 (H)									
8.	AB Cap Fd Inc Global REI (AREAX)	A	Dividend	K	T					
9.	Alliance Bernstein Large-Cap Growth Class A (APGAX)	B	Dividend	M	T					
10.	Alliance Bernstein Sustainable Global Thematic Fund (ALTFX)	A	Dividend	K	T					
11.	John Hancock Regional Bank (FRBAX)	B	Dividend	L	T					
12.	PGIM Jennison Blend Fund Class A (PBQAX)	B	Dividend	K	T					
13.	Account #2 (H)									
14.	Putnam Emerging Mkts Equity Fd Cl A (PEMMX)	A	Dividend	J	T					
15.	Touchstone Strategic Tr Large Cap Focused Fund Cl A (SENCX)	A	Dividend	K	T					
16.	Account #3 (H)									
17.	Baron Invt Funds Trust Small Cap Fund (FSFIX)	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
Steele, William H.	04/11/2024

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)	
18.	Dodge & Cox Stock Fund (DODGX)	A	Dividend	J	T					
19.	American Funds Euro Pacific Growth (AEPGX)	A	Dividend	J	T					
20.	AMG Timessquare Mid Cap Grwth Fd I (TQMIX)	A	Dividend	K	T					
21.	American Funds The Bond Fund of America F2 (ABNFX)	A	Dividend			Sold	07/26/23	J		
22.	Goldman Sachs Tr Financial Square Treas Instrs Fd (FTIXX)	A	Dividend	J	T	Buy	02/24/23	J		
23.						Buy (add'l)	07/27/23	J		
24.	American Funds Growth Fd of Amer F2 (GFFFX)	B	Dividend	K	T	Buy (add'l)	02/24/23	J		
25.						Buy (add'l)	07/26/23	J		
26.	American Funds New World Fd F2 (NFFFX)	A	Dividend	K	T					
27.	American Funds Wash Mut Fd F2 (WMFFX)	B	Dividend	K	T	Sold (part)	02/24/23	J	A	
28.						Buy (add'l)	07/26/23	J		
29.	Invesco Oppenheimer Dev Mkts Cl Y (ODVYX)	A	Dividend	K	T					
30.	Jensen Portfolio Inc Class I SHS (JENIX)	A	Dividend	J	T					
31.	John Hancock Funds III Disc Val Mid Cap Fd (JVMIX)	A	Dividend	K	T	Sold (part)	02/24/23	J		
32.	American Funds Europac Grwth Fd F2 (AEPFX)	A	Dividend	K	T					
33.	Pimco Commodities Plus Strategy Fd (PCLIX)	A	Dividend	J	T					
34.	Pimco Fds Pac Invt Mgmt Ser Emerg Mkts I (PEBIX)	A	Dividend			Sold	07/26/23	J		

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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	
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35. Pimco Commodity Real Return Strategy Fund Instl Cl (PCRIX)	B	Dividend	J	T	Buy (add'l)	02/24/23	J		
36. Putnam Growth Opportunities Fund Class A (POGAX)	B	Dividend	N	T	Sold (part)	06/22/23	K	D	
37. T Rowe Price Intl Overseas Fund (TROSX)	A	Dividend	K	T	Buy (add'l)	07/26/23	J		
38. Victory Sycamore Small Co Opp Fd I (VSOIX)	B	Dividend	K	T	Sold (part)	02/24/23	J	A	
39.					Buy (add'l)	07/26/23	J		
40. Account #4 (H)									
41. Wells Fargo Standard Bank Deposit (cash)	A	Interest	J	T					
42. Abbott Laboratories (ABT)	A	Dividend	J	T					
43. Accenture PLC (ACN)	A	Dividend	J	T					
44. AFLAC Inc (AFL)	A	Dividend	J	T					
45. Air Products & Chemicals Inc (APD)	A	Dividend	J	T					
46. American Tower Corp (AMT)	A	Dividend	J	T					
47. Amgen Inc (AMGN)	A	Dividend	J	T	Buy (add'l)	02/10/23	J		
48. Analog Devices, Inc. (ADI)	A	Dividend	J	T					
49. Apple Inc. (AAPL)	A	Dividend	K	T	Buy (add'l)	07/03/23	J		
50.					Buy (add'l)	10/02/23	J		
51. Automatic Data Processing (ADP)	A	Dividend	J	T					

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52. Becton Dickinson & Co (BDX)	A	Dividend	J	T					
53. BlackRock Inc (BLK)	A	Dividend	J	T					
54. Chevron Corp (CVX)	A	Dividend	J	T	Buy (add'l)	04/11/23	J		
55. Chubb LTD (CB)	A	Dividend	J	T					
56. Cisco Systems Inc (CSCO)	A	Dividend	J	T					
57. Clorox Co (CLX)	A	Dividend			Sold	07/03/23	J	B	
58. CMS Energy Corp (CMS)	A	Dividend	J	T	Buy	02/10/23	J		
59. Colgate-Palmolive Co (CL)	A	Dividend	J	T					
60. Comcast Corp New Cl A (CMCSA)	A	Dividend	J	T					
61. Costco Whsl Corp (COST)	A	Dividend	J	T					
62. Emerson Electric Co (EMR)	A	Dividend	J	T					
63. Eversource Energy (ES)	A	Dividend	J	T					
64. Factset Research Systems (FDS)	A	Dividend	J	T					
65. General Dynamics (GD)	A	Dividend	J	T					
66. Grainger W W Inc (GWW)	A	Dividend	J	T					
67. Illinois Tool Works Inc (ITW)	A	Dividend	J	T					
68. Johnson & Johnson (JNJ)	A	Dividend	J	T					

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69. JP Morgan Chase & Co (JPM)	A	Dividend	J	T					
70. Linde PLC (LIN)	A	Dividend	J	T					
71. Lowe's Companies (LOW)	A	Dividend	J	T					
72. L3Harris Corp (HRS)	A	Dividend	J	T					
73. McDonald's Corp (MCD)	A	Dividend	J	T					
74. Medtronic Inc (MDT)	A	Dividend	J	T					
75. Microsoft Corp (MSFT)	A	Dividend	K	T	Sold (part)	02/10/23	J	B	
76. NextEra Energy Inc (NEE)	A	Dividend	J	T	Sold (part)	02/10/23	J	B	
77.					Buy (add'l)	10/02/23	J		
78. Nike Inc (NKE)	A	Dividend	J	T	Buy (add'l)	02/10/23	J		
79. Norfolk Southern (NSC)	A	Dividend	J	T	Buy (add'l)	10/02/23	J		
80. P P G Industries (PPG)	A	Dividend	J	T					
81. Paychex Inc (PAYX)	A	Dividend	J	T					
82. PepsiCo Inc (PEP)	A	Dividend	J	T					
83. Phillips 66 (PSX)	A	Dividend	J	T					
84. Procter & Gamble (PG)	A	Dividend	J	T					
85. Raytheon Technologies Corp (RTX)	A	Dividend			Sold	10/06/23	J	B	

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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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86. S&P Global Inc (SPGI)	A	Dividend	J	T	Buy	10/06/23	J		
87. Target Corp (TGT)	A	Dividend	J	T	Buy (add'l)	10/02/23	J		
88. Unitedhealth Group Inc (UNH)	A	Dividend	J	T					
89. US Bancorp (USB)	A	Dividend			Sold	09/12/23	J		
90. VF Corp (VFC)		None			Sold	02/10/23	J		
91. Walmart Inc (WMT)	A	Dividend	J	T	Sold (part)	07/03/23	J	B	
92. WEC Energy Group (WEC)	A	Dividend	J	T					
93. Account #5 (H)									
94. Alliance Bernstein Large Capital Growth (APGAX)	B	Dividend	M	T					
95. Fidelity Advisors Small Cap Value Fund (FCVAX)	A	Dividend	K	T					
96. American Funds Fundamental Investors Inc. (ANCFX)	D	Dividend	M	T					
97. American Funds Growth Fund of America (AGTHX)	E	Dividend	M	T					
98. Franklin Mutual Shares (TESIX)	C	Dividend	K	T					
99. American Funds New Economy Fund (ANEFX)	C	Dividend	L	T					
100. Putnam Invt Fds Multi-Cap Value Fund (PMVAX)		None	L	T					
101. American Funds Washington Mutual (AWSHX)	D	Dividend	M	T					
102. Allspring Money Market Fund Class Premier (WMPXX)	A	Dividend	K	T	Buy	06/30/23	K		

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103. Account #6 (H)									
104. FIDVIP Free 2020 SVC 2 (FFRTT)		None	L	T	Sold (part)	06/22/23	J		
105. NW AMFDS NVIT ASSTALLOC II		None	M	T	Sold (part)	06/22/23	J		
106. NW NVIT INV DEST CAPAPP II		None	L	T	Sold (part)	06/22/23	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

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

Part VII, line 4: Level of risk only; no control over selections or transactions.

Part VII, Account #6 is a Nationwide Destination B Variable Annuity; underlying assets are listed in Part VII.

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, per page 45 of the filing instructions.

Name of Person Reporting	Date of Report
Steele, William H.	04/11/2024

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/ William H. Steele

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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