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
Truncale, Michael J.	U.S. District Court, Eastern District of Texas	05/02/2025
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 -- Active	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
United States Courthouse 300 Willow Street, Room 221 Beaumont, Texas 77701		

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.	Treasurer	[redacted]
2.	Trustee	Texas Supreme Court Historical Society
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.			
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	[redacted]
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.	Nancy Atlas Inn of Court	Honorary Membership (dues, like privileges)	$400.00
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
Truncale, Michael J.	05/02/2025

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. Loomis Sayles Investment Grade Bond CL Y	A	Dividend	L	T	Buy	01/22/24	L		
2.					Sold (part)	11/05/24	J		
3. MFS Intl Equity CL 1	B	Dividend	K	T	Buy	01/22/24	K		
4.					Buy (add'l)	11/05/24	J		
5. First Trust Water ETF	A	Dividend	K	T	Sold (part)	01/02/24	J		
6.					Sold (part)	01/22/24	J		
7.					Sold (part)	11/05/24	J		
8. JPMorgan Equity Premium Income ETF	E	Dividend	K	T	Buy	01/22/24	K		
9.					Buy (add'l)	11/22/24	J		
10. Madison Mid Cap CL 1	B	Dividend	K	T	Buy	01/22/24	K		
11.					Buy (add'l)	11/05/24	J		
12. Natixas Oakmark CL Y	B	Dividend	K	T	Buy	01/22/24	L		
13.					Sold (part)	11/05/24	K		
14. Janus Detroit Henderson AAA CLO RTF	B	Dividend	K	T	Buy	11/05/24	K		
15. PGIM Select Real Estate CL Z	A	Dividend	K	T	Buy	11/05/24	K		
16. Calvert Core Bond CL 1	A	Dividend	K	T	Buy	01/22/24	L		
17.					Sold (part)	11/05/24	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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Truncale, Michael J.	05/02/2025

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. Fidelity Advisor Growth OPPTYS CL 1	A	Dividend	K	T	Buy	01/22/24	L		
19.					Sold (part)	11/05/24	K		
20. Goldman Sachs Intl Equity Income Instl CL	A	Dividend	K	T	Buy	01/22/24	K		
21.					Sold (part)	11/05/24	J		
22. Fidelity Invt Money Market Govt Instl CL	C	Dividend	L	T	Buy (add'l)	11/05/24	L		
23. Stifel Cash Account	A	Interest	J	T					
24. Western Asset Core Plus Bond FD CL 1	B	Dividend			Sold (part)	01/03/24	J		
25.					Sold	01/22/24	L		
26. Steller Bank	A	Interest	K	T					
27. lnvesco Small Cap Value CL Y	B	Dividend	K	T	Sold (part)	01/02/24	J		
28.					Sold (part)	01/22/24	J		
29.					Sold (part)	11/05/24	J		
30. Pnrnassus Core Equty Instl Cl	B	Dividend	K	T	Sold (part)	01/02/24	J		
31.					Sold (part)	01/22/24	J		
32.					Sold (part)	11/05/24	K		
33. Cohen & Steers Global Realty Cl 1	A	Dividend			Sold (part)	01/02/24	J		
34.					Buy (add'l)	01/22/24	J		

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35.					Sold	11/05/24	J		
36. Eaton Vance Atlanta Cap SMID Cap Cl 1	B	Dividend			Sold (part)	01/03/24	J		
37.					Sold	11/22/24	K		
38. Fidelity Advisor High Income Advantage Cl 1	B	Dividend			Sold (part)	01/02/24	J		
39.					Sold	01/22/24	K		
40. Fidelity Advisor Intl Cap Apprec. Cl 1	B	Dividend	K	T	Sold (part)	01/02/24	J		
41.					Sold (part)	01/22/24	J		
42.					Buy (add'l)	11/05/24	J		
43. John Hancock Investment Grade Bond Cl1	B	Dividend	K	T	Sold (part)	01/02/24	J		
44.					Buy (add'l)	01/22/24	J		
45.					Sold (part)	11/05/24	J		
46. Janus Henderson Global Equity Income Cl 1	B	Dividend			Sold (part)	01/02/24	J		
47.					Sold	01/22/24	K		
48. John Hancock Disciplined Val Mid Cap Cl 1	C	Dividend	K	T	Sold (part)	01/02/24	J		
49.					Sold (part)	01/22/24	J		
50.					Sold (part)	11/05/24	J		
51. JP Morgan Equity Income Cl 1	C	Dividend			Sold (part)	01/02/24	J		

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52.					Sold	01/22/24	J		
53. Morgan Stanley Instl Growth Cl 1	E	Dividend			Sold (part)	01/02/24	J		
54.					Sold	01/22/24	L		
55. Loomis Sayles Core Plus Bond Cl Y	C	Dividend			Sold (part)	01/02/24	J		
56.					Sold	01/22/24	L		
57. Pimco Global Bond Opptys US Dollar Hedged Instl Cl	E	Dividend			Sold (part)	01/02/24	J		
58.					Sold (part)	01/22/24	J		
59.					Sold	11/05/24	J		
60. Pimco Income Instl Cl	C	Dividend	L	T	Sold (part)	01/02/24	J		
61.					Buy (add'l)	01/22/24	J		
62.					Buy (add'l)	11/05/24	J		
63. Principal Mid Cap Instl Cl	C	Dividend	K	T	Sold (part)	01/02/24	J		
64.					Sold (part)	01/22/24	J		
65.					Sold (part)	11/05/24	J		
66. Transamerica Intl Equity Cl 1	C	Dividend			Sold (part)	01/02/24	J		
67.					Sold	01/22/24	K		
68. Mineral Interest #1, Jefferson County, Texas "X"	C	Royalty	J	W					

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

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3. Value Method Codes (See Column C2)
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☐ NONE *(No reportable income, assets, or transactions.)*

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69.	Mineral Interest #2, Jefferson County, Texas "X"	C	Royalty	J	W					

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

Name of Person Reporting	Date of Report
Truncale, Michael J.	05/02/2025

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/ Michael J. Truncale

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
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544