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 |
|---|---|---|
| Wetherell, II, Thomas K. | U.S. District Court, Northern District of Florida | 4/26/2025 |
| **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 | ☐ Nomination Date<br>☐ Initial ☑ Annual ☐ Final | 01/01/2024 **to** 12/31/2024 |
| | **5b.** ☐ Amended Report | |
| **7. Chambers or Office Address** | | |
| United States Courthouse<br>1 North Palafox Street<br>Pensacola, FL 32502 | | |

***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. | 1999 | State of Florida Retirement System defined benefit pension plan |
| 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. | Florida Bar | June 19-20, 2024 | Orlando, FL | Educational seminar | Travel, hotel, food. |
| 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 |
|---|---|
| **Wetherell, II, Thomas K.** | 4/26/2025 |

## 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. Investment Account #1 (H) | | | | | | | | | |
| 2. -Alcon common stock (ALC) | A | Dividend | J | T | | | | | |
| 3. - Allstate common stock (ALL) | D | Dividend | O | T | | | | | |
| 4. - Altria Group common stock (MO) | C | Dividend | L | T | | | | | |
| 5. - AT&T common stock (T) | A | Dividend | J | T | | | | | |
| 6. - Bristol Myers common stock (BMY) | C | Dividend | L | T | | | | | |
| 7. - Cigna common stock (CI) | A | Dividend | K | T | | | | | |
| 8. - Coca Cola common stock (KO) | B | Dividend | K | T | | | | | |
| 9. - Comcast common stock (CMCSA) | A | Dividend | K | T | | | | | |
| 10. - Discover Financial Services common stock (DFS) | B | Dividend | M | T | | | | | |
| 11. - Edison International common stock (EIX) | C | Dividend | M | T | | | | | |
| 12. - Fidelity Investment Money Market (FSIXX) | A | Dividend | M | T | Buy | 11/22/24 | J | | |
| 13. - International Paper Company common stock (IP) | A | Dividend | J | T | | | | | |
| 14. - Invesco America Fund (VAFAX) | | None | M | T | | | | | |
| 15. - Kraft Heinz common stock (KHC) | A | Dividend | J | T | | | | | |
| 16. - Lands End common stock (LE) | | None | J | T | | | | | |
| 17. - Merck common stock (MRK) | C | Dividend | M | 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 |
|---|---|
| **Wetherell, II, Thomas K.** | 4/26/2025 |

## 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. - MFS Government Income Fund (MGF) | A | Dividend | J | T | | | | | |
| 19. - Mondalez International common stock (MDLZ) | B | Dividend | L | T | | | | | |
| 20. - Morgan Stanley common stock (MS) | D | Dividend | N | T | | | | | |
| 21. - Morgan Stanley money market account | A | Interest | L | T | | | | | |
| 22. - Novartis common stock (NVS) | B | Dividend | L | T | | | | | |
| 23. - Oracle common stock (ORCL) | B | Dividend | M | T | | | | | |
| 24. - Oraganon & Co common stock (OGN) | A | Dividend | | | Sold | 11/22/24 | J | A | |
| 25. - Pepsico common stock (PEP) | B | Dividend | K | T | | | | | |
| 26. - Pfeizer common stock (PFE) | A | Dividend | J | T | | | | | |
| 27. - PGIM National Mutual Fund (PRNMX) | A | Dividend | K | T | | | | | |
| 28. - Philip Morris common stock (PM) | D | Dividend | M | T | | | | | |
| 29. - PNM Resources common stock (PNM) (Y) | | | | | | | | | |
| 30. - Sandoz Group common stock (SDZNY) | A | Dividend | J | T | | | | | |
| 31. - Sanofi common stock (SNY) | A | Dividend | K | T | | | | | |
| 32. - SRH Total Return Fund (STEW) | A | Dividend | K | T | | | | | |
| 33. - Teradata Corporation common stock (TDC) | | None | J | T | | | | | |
| 34. - TXNM Energy (TXNM) (X) | A | 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

| Name of Person Reporting | Date of Report |
|---|---|
| **Wetherell, II, Thomas K.** | 4/26/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 35. - Verizon common stock (VZ) | A | Dividend | J | T | | | | | |
| 36. - Virtas Silvant Focused Growth A Fund (PGWAX) (X) | A | Dividend | N | T | | | | | |
| 37. - Walt Disney Company common stock (DIS) | A | Dividend | M | T | | | | | |
| 38. - Warner Bros Discovery common stock (WBD) | | None | J | T | | | | | |
| 39. - Yum Brands common stock (YUM) | A | Dividend | J | T | | | | | |
| 40. - Zimmer Holdings common stock (ZBH) | A | Dividend | J | T | | | | | |
| 41. Investment Account #2 (H) | | | | | | | | | |
| 42. - Morgan Stanley money market account | A | Interest | K | T | | | | | |
| 43. - Vanguard S&P 500 fund (VOO) | A | Dividend | K | T | Buy | 11/22/24 | K | | |
| 44. - Fidelity Investment money market (FXIXX) | A | Distribution | K | T | Buy | 11/22/24 | K | | |
| 45. American Century IRA (H) | | | | | | | | | |
| 46. - American Century Select Fund (TWCIX) | E | Dividend | N | T | | | | | |
| 47. DWS Scudder Roth IRA #1 (H) | | | | | | | | | |
| 48. - DWS Capital Growth Fund (SCGSX) | B | Dividend | K | T | | | | | |
| 49. - DWS Large Capital Focused Growth Fund (SCQGX) | C | Dividend | M | T | | | | | |
| 50. DWS Scudder Roth IRA #2 (H) | | | | | | | | | |
| 51. - DWS Capital Growth Fund (SCGSX) | B | 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

| Name of Person Reporting | Date of Report |
|---|---|
| **Wetherell, II, Thomas K.** | 4/26/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 52. - DWS Large Capital Focused Growth Fund (SCQGX) | C | Dividend | M | T | | | | | |
| 53. DWS Scudder SEP Plan (H) | | | | | | | | | |
| 54. - DWS Managed Mutual Bond Fund (SMLAX) | A | Dividend | J | T | | | | | |
| 55. - DWS Core Equity Fund (SUWAX) | A | Dividend | K | T | | | | | |
| 56. - DWS CROCI US Fund (DCUAX) | A | Dividend | J | T | | | | | |
| 57. Vangaurd IRA #1 (H) | | | | | | | | | |
| 58. - Vanguard Value Index Fund (VVIAX) | B | Dividend | L | T | | | | | |
| 59. Vanguard IRA #2 (H) | | | | | | | | | |
| 60. - Federal Money Market Fund (VMFXX) | A | Dividend | J | T | | | | | |
| 61. - Vanguard Morgan Growth Fund (VMRAX) (Y) | | | | | | | | | |
| 62. - Vanguard US Growth Admiral (VWUAX) (X) | A | Dividend | M | T | | | | | |
| 63. Vanguard IRA #3 (H) | | | | | | | | | |
| 64. - Vangaurd Target Retirement 2065 Fund (VLXVX) | A | Dividend | K | T | Buy (add'l) | 04/15/24 | J | | |
| 65. Section 457(b) Plan (H) | | | | | | | | | |
| 66. - Vanguard MidCap 400 Index Fund (VSPMX) | C | Dividend | N | T | | | | | |
| 67. - MSIF Growth Fund (VINIX) (Y) | | | | | | | | | |
| 68. - Fidelity Blue Chip Growth (FBCGX) (X) | C | Dividend | O | 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 |
|---|---|
| **Wetherell, II, Thomas K.** | 4/26/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 69. - Vanguard Institutional Index Fund (VINIX) | D | Dividend | M | T | | | | | |
| 70. - NRS Florida Fixed Fund | | None | K | T | | | | | |
| 71. Wells Fargo IRA (H) | | | | | | | | | |
| 72. - Wells Fargo certificate of deposit | A | Interest | K | T | | | | | |
| 73. Alger International Growth Fund (ALGAX) | A | Dividend | J | T | | | | | |
| 74. Bank of America common stock (BAC) | C | Dividend | M | T | | | | | |
| 75. Commonwealth Annuity (H) | | | | | | | | | |
| 76. - Columbia Strategic Income Fund (COSIX) | | None | N | T | | | | | |
| 77. DWS CROCI International Fund (SCINX) | A | Dividend | K | T | | | | | |
| 78. Edison International common stock (EIX) | D | Dividend | M | T | | | | | |
| 79. Florida College Prepaid Plan | D | Distribution | J | W | | | | | |
| 80. Undeveloped land, St. Johns County, Florida (50% interest) | | None | J | S | | | | | |
| 81. Vangaurd 500 Index Fund (VFIAX) | C | Dividend | M | T | | | | | |
| 82. Vanguard Windsor II Fund (VWNAX) | F | Dividend | O | T | | | | | |
| 83. Truist cash accounts | A | Interest | K | T | | | | | |
| 84. Wells Fargo cash accounts | A | Interest | K | T | | | | | |
| 85. State Farm money market account #1 | A | Interest | | | Closed | 1/1/24 | 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

| Name of Person Reporting | Date of Report |
|---|---|
| **Wetherell, II, Thomas K.** | 4/26/2025 |

## 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) | |
|---|---|---|---|---|---|---|---|---|---|
| 86. State Farm money market account #2 | A | Interest | | | Closed | 1/1/24 | M | | |
| 87. Truist certificate of despost #1 | D | Interest | M | T | Open | 1/11/24 | M | | |
| 88. Truist certificate of deposit #2 | C | Interest | L | T | Open | 1/11/24 | 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

| Name of Person Reporting | Date of Report |
|---|---|
| **Wetherell, II, Thomas K.** | 4/26/2025 |

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

Part VII, line 34: Formerly PNM Resources (line 29). Name change.

Part VII, live 41: Formerly Investment Account #3 (H). Prior Investment Account #2 (H) became unreportable in 2023.

Part VII, line 62: Formerly Vanguard Morgan Growth Fund (line 62). Substituted by plan administrtor.

Part VII, line 63: Formerly Vanguard IRA #4 (H). Piror Vanguard IRA #3 (H) became unreportable in 2023.

Part VII, line 68: Formerly MSIF Growth Fund (line 68). Substituted by plan administrator.

Part VII, line 79: Value estimated based on plan's unused credit hours (5.85 tuition, 10.14 fees) as of 12/31/24 multiplied by current tuition/fee rate ($115.08 per credit hour).

Part VII, line 80: Per the St. Johns County Property Appraiser's website, the land's market value as of 1/1/24 was $12,625 and its assessed value for tax purposes was $12,625.

Part VII, line 83: Name changed from Suntrust to Truist

Part VII, lines 85-88: Money market accounts with proceeds from [redacted] life insurance (paid in 2023) were closed and moved into CDs.

| Name of Person Reporting | Date of Report |
|---|---|
| **Wetherell, II, Thomas K.** | 4/26/2025 |

## 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 K. Wetherell, II**

**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