AO 10
Rev. 1/2019

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 101-111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Agee, George S.	4th Circuit	05/12/2023
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**
Active Circuit Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
Fourth Circuit U.S. Court of Appeals 1100 E. Main Street Richmond, VA 23218		

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 pp. 9-13 of filing instructions)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Life Trustee	Bridgewater College
2.	Director	Roanoke Equity Group, LLC
3.	Trustee	Trust #1
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

Name of Person Reporting	Date of Report
Agee, George S.	05/12/2023

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions)*

A. Filer's Non-Investment Income

☐ NONE *(No reportable non-investment income.)*

DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1. 2022	Commonwealth of Virginia-Retirement Income	$80,000.00
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 AND TYPE
1. 2022	Carilion Clinic-Salary
2. 2022	RGC Resources, Inc. - Director Fees
3. 2022	American National Bank - Director Fees
4. 2022	Health Care Realty Trust Incorporated - Director Fees
5. 2022	Change Healthcare - Consultant Fees
6. 2022	Mytonomy - Director Fees

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)

☑ 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 pp. 28-31 of filing instructions.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Agee, George S.	05/12/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(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)	(5) Identity of buyer/seller (if private transaction)
1. AMNB	D	Dividend	N	T					
2. SUWI, LLC - (H)									
3. -Rental Property #1 Roanoke, VA	C	Distribution	L	W					
4. Healthcare Realty Trust, Inc.	D	Dividend	M	T					
5. Agee Mill, LLC	A	Distribution	L	W					
6. RGC Resources, Inc.	D	Dividend	O	T					
7. Edward Jones Cash Account	A	Interest	J	T					
8. RCC Equity Group, LLC		None	K	U					
9. IRA #1 - (H)									
10. -IGAAX	A	Dividend	J	T					
11. -ANWPX	A	Dividend	K	T					
12. -CWGIX	A	Dividend	J	T					
13. -AMRMX	A	Dividend	K	T					
14. -ANCFX	A	Dividend	K	T					
15. -CAIBX	A	Dividend	K	T					
16. -AMECX	A	Dividend	K	T					
17. -AMCPX	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

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18. -AGTHX	A	Dividend	K	T					
19. -NEWFX	A	Dividend	J	T					
20. Retirement Account #1 Virginia Deferred Compensation Plan - (H)									
21. -VRS Stock Fund	C	Dividend	N	T					
22. -Stable Value Fund	A	Dividend	L	T					
23. -VRS Int'l Stock Fund	C	Dividend	L	T					
24. -VRS Small/Mid Cap Stock Fund	B	Dividend	K	T					
25. IRA #2 - (H)									
26. -IGAAX	A	Dividend	J	T					
27. -ANWPX	A	Dividend	J	T					
28. -CWGIX	A	Dividend	J	T					
29. -AMRMX	A	Dividend	J	T					
30. -ANCFX	A	Dividend	J	T					
31. -CAIBX	A	Dividend	J	T					
32. -AMECX	A	Dividend	K	T					
33. -AMCPX	A	Dividend	J	T					
34. -AGTHX	A	Dividend	J	T					

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35. -NEWFX	A	Dividend	J	T					
36. Retirement Account #2 Carilion Health System Sec 403(b) Plan - (H)									
37. -Metropolitan West Total Return Bond Plan	C	Dividend	J	T					
38. -Loomis Soyles Small Cap Growth Inst	C	Dividend	J	T					
39. -Vanguard Instl Index I	A	Dividend	J	T					
40. Retirement Acct #3 Carilion Health System Sec 457(b) Plan - (H)									
41. -Metropolitan West Total Return Bond Plan	B	Dividend	L	T					
42. -J Hancock Disciplined Value R6	D	Dividend	N	T					
43. -Vanguard Instl I	D	Dividend	N	T					
44. Retirement Acct #4 Equivest TSA 501(c)(3) Plan - (H)									
45. -EQ Guaranteed Interest	A	Dividend	J	T					
46. -EQ International Equity Index	A	Dividend	J	T					
47. -EQ/AB Small Cap Growth	A	Dividend	J	T					
48. -EQ/MidCap VAL managed Vol	A	Dividend	J	T					
49. -EQ Value Equity (formerly EQ Black Rock Basic)	B	Dividend	K	T					
50. -Equitable Multimanager Core Bond	A	Dividend	J	T					
51. -Equitable Core Plus Bond (formerly Charter Multi Sector Bond)	A	Dividend	J	T					

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	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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52. Life Insurance Policy #1 Natl Life Ins Co Whole Life	C	Dividend	M	T					
53. Life Insurance Policy #2 Equitable Variable Life - (H)									
54. -EQ/Moderate Allocation	A	Dividend			Redeemed	08/09/22	J	B	
55. -EQ/Common Stock Index	A	Dividend			Redeemed	08/09/22	J	B	
56. -Multimanager, Aggressive Equity	A	Dividend			Redeemed	08/09/22	J	B	
57. GOFXX	A	Interest	J	T					
58. OWLSX	E	Dividend	P1	T					
59. OWSMX	E	Dividend	N	T					
60. OWACX	E	Dividend	O	T					
61. OWCIX	D	Dividend	M	T					
62. OWMBX	D	Interest	O	T					
63. BOTJ	A	Dividend	K	T					
64. IVV	A	Dividend	M	T					
65. ABTYX	A	Dividend	K	T					
66. FWGIX	A	Dividend	K	T					
67. FUNFX	A	Dividend	K	T					
68. GAFFX	A	Dividend	K	T					

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69. HGIFX	A	Dividend	K	T					
70. FIFAX	A	Dividend	J	T					
71. JPPEX	A	Dividend	K	T					
72. MPVOX	A	Dividend	J	T					
73. MPMNX	A	Dividend	K	T					
74. MFEKX	A	Dividend			Sold	12/22/22	K	A	
75. FNPFX	A	Dividend	K	T					
76. FNWFX	A	Dividend	K	T					
77. TBCIX	A	Dividend	K	T					
78. IEFA	A	Dividend	J	T					
79. TIP	A	Dividend	K	T					
80. IUSG	A	Dividend	L	T					
81. VO	A	Dividend	K	T					
82. VB	A	Dividend	J	T					
83. IUSV	A	Dividend	J	T					
84. IWR	A	Dividend	J	T					
85. CFIHX	A	Dividend	J	T					

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86. TFEBX	A	Dividend	J	T					
87. FITQX	A	Dividend	J	T					
88. Retirement Acct #6 SEP (H)									
89. -IEMG	A	Dividend	J	T					
90. -IJR	A	Dividend	J	T					
91. -IVV	A	Dividend	K	T					
92. -ISTB	A	Dividend	K	T					
93. -VEU	A	Dividend	K	T					
94. -VO	A	Dividend	K	T					
95. -FEUPX	A	Dividend	K	T					
96. -FNWFX	A	Dividend	J	T					
97. -BAGIX	A	Dividend	K	T					
98. -MFEKX	A	Dividend	K	T					
99. -MITJX	A	Dividend	K	T					
100. -PHYQX	A	Dividend	J	T					
101. -TRGXX	A	Dividend	J	T					
102. Trust #1 (H)									

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103. -AMNB Money Market	A	Interest			Distributed	01/05/22	J		
104. ATFSX	A	Dividend	J	T					
105. IRA #3 - (H)									
106. -OWFIX	D	Interest	N	T					
107. -OWLSX	D	Dividend	N	T					
108. -OWSMX	D	Dividend	M	T					
109. -OWACX	D	Dividend	N	T					
110. -OWCIX	C	Dividend	L	T					
111. MEIKX	A	Dividend	J	T					
112. PDGIX	A	Dividend	J	T					
113. Chorda Pharma, Inc.	A	Dividend	J	T					
114. Mytonomy, Inc.	A	Dividend	L	T	Buy	05/02/22	K		
115. Life Insurance Policy #3 Prudential Life (H)									
116. -AST JP Morgan Intl Equity	A	Dividend	J	T	Buy	04/26/22	J		
117. -AST MFS Global Equity	A	Dividend	J	T	Buy	04/26/22	J		
118. -AST Large Cap Growth	A	Dividend	J	T	Buy	04/26/22	J		
119. -PSF Small Cap Value	A	Dividend	J	T	Buy	04/26/22	J		

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120. -Fidelity VIP Midcap	A	Dividend	J	T	Buy	04/26/22	J		
121. -PSF Global	A	Dividend	J	T	Buy	04/26/22	J		
122. -MFS Utilities Series IC	A	Dividend	J	T	Buy	04/26/22	J		
123. -AST Large Cap Value	A	Dividend	J	T	Buy	04/26/22	J		
124. -PSF Stock Index	A	Dividend	J	T	Buy	04/26/22	J		
125. -AST Core Fixed Income	A	Dividend	J	T	Buy	04/26/22	J		
126. -AST International Equity	A	Dividend	J	T	Buy	04/26/22	J		
127. HIMEX	A	Dividend	K	T	Buy	12/22/22	K		
128. VYMI	A	Dividend	K	T	Buy	05/22/22	K		
129. VTV	A	Dividend	K	T	Buy	05/11/22	K		
130. MUB	A	Dividend	K	T	Buy	12/22/22	K		
131. EFA	A	Dividend	J	T	Buy	09/22/22	J		
132. Roanoke VAEDA Bond	A	Interest	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		

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

Part VII, Line 102. All the assets of Trust #1 have been distributed and the Trust ended with no assets.

Part VII, Line 132. This asset was inadvertently omitted from 2021 disclosure form.

Name of Person Reporting	Date of Report
Agee, George S.	05/12/2023

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. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ George S. Agee

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. § 104)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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