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
Agee, George S.	4th Circuit	04/30/2024
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**
Active Circuit Judge	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2023 **to** 12/31/2023
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 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.	Life Trustee	Bridgewater College
2.	Director	Roanoke Equity Group, LLC
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	Commonwealth of Virginia-Retirement Income	$85,000.00
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
1.	2023	Carilion Clinic-Salary
2.	2023	RGC Resources, Inc. - Director Fees
3.	2023	American National Bank - Director Fees
4.	2023	Health Care Realty Trust Incorporated - Director Fees
5.	2023	Change Healthcare - Consultant Fees
6.	2023	Mytonomy - Director Fees

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
Agee, George S.	04/30/2024

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. AMNB	D	Dividend	O	T					
2. SUWI, LLC - (H)									
3. -Rental Property #1 Roanoke, VA	C	Distribution	L	W					
4. Healthcare Realty Trust, Inc.	D	Dividend	N	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	J	T					
14. -ANCFX	A	Dividend	J	T					
15. -CAIBX	A	Dividend	K	T					
16. -AMECX	A	Dividend	K	T					
17. -AMCPX	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
Agee, George S.	04/30/2024

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)	 (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	 (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	 (2) Date mm/dd/yy	 (3) Value Code 2 (J-P)	 (4) Gain Code 1 (A-H)	
18. -AGTHX	A	Dividend	J	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	L	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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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)	 (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	 (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	 (2) Date mm/dd/yy	 (3) Value Code 2 (J-P)	 (4) Gain Code 1 (A-H)	
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	K	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	K	T					
48. -EQ/MidCap VAL managed Vol	A	Dividend	J	T					
49. -EQ Value Equity	B	Dividend	K	T					
50. -Equitable Multimanager Core Bond	A	Dividend	J	T					
51. -Equitable Core Plus Bond	A	Dividend	J	T					

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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
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M =$100,001 - $250,000
N =$250,001 - $500,000
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3. Value Method Codes (See Column C2)
Q =Appraisal
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52. Life Insurance Policy #1 Natl Life Ins Co Whole Life	C	Dividend	M	T					
53. GOFXX	A	Interest	M	T					
54. OWLSX	E	Dividend	P1	T					
55. OWSMX	E	Dividend	N	T					
56. OWACX	E	Dividend	O	T					
57. OWCIX	D	Dividend	L	T					
58. OWMBX	D	Interest	O	T					
59. BOTJ	A	Dividend	K	T					
60. IVV	A	Dividend	M	T					
61. ABTYX	A	Dividend	K	T					
62. FWGIX	A	Dividend	L	T					
63. FUNFX	A	Dividend	K	T					
64. GAFFX	A	Dividend	K	T					
65. HGIFX	A	Dividend	K	T					
66. FIFAX	A	Dividend	J	T					
67. JPPEX	A	Dividend	K	T					
68. MPVOX	A	Dividend	J	T					

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69. MPMNX	A	Dividend			Sold	12/22/23	J	A	
70. MFEKX	A	Dividend	J	T	Buy	03/23/23	J		
71. FNPFX	A	Dividend	K	T					
72. FNWFX	A	Dividend	K	T					
73. TBCIX	A	Dividend	K	T					
74. IEFA	A	Dividend	K	T					
75. TIP	A	Dividend			Sold	11/16/23	K	B	
76. IUSG	A	Dividend	L	T					
77. VO	A	Dividend	K	T					
78. VB	A	Dividend	K	T					
79. IUSV	A	Dividend	J	T					
80. IWR	A	Dividend	J	T					
81. CFIHX	A	Dividend	J	T	Buy	03/23/23	J		
82. TFEBX	A	Dividend	J	T					
83. FITQX	A	Dividend	J	T					
84. Retirement Acct #6 SEP (H)									
85. -IEMG	A	Dividend	J	T					

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86. -IJR	A	Dividend	J	T					
87. -IVV	A	Dividend	K	T					
88. -ISTB	A	Dividend	K	T					
89. -VEU	A	Dividend	K	T					
90. -VO	A	Dividend	K	T					
91. -FEUPX	A	Dividend	K	T					
92. -FNWFX	A	Dividend	J	T					
93. -BAGIX	A	Dividend	K	T					
94. -MFEKX	A	Dividend	K	T					
95. -MITJX	A	Dividend	K	T					
96. -PHYQX	A	Dividend	J	T					
97. -TRGXX	A	Dividend	J	T					
98. ATFSX	A	Dividend	J	T					
99. IRA #3 - (H)									
100. -OWFIX	D	Interest	N	T					
101. -OWLSX	D	Dividend	N	T					
102. -OWSMX	D	Dividend	M	T					

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103. -OWACX	D	Dividend	N	T					
104. -OWCIX	C	Dividend	L	T					
105. MEIKX	A	Dividend	J	T					
106. PDGIX	A	Dividend	J	T					
107. Chorda Pharma, Inc.	A	Dividend	J	T					
108. Mytonomy, Inc.	A	Dividend	L	T					
109. Life Insurance Policy #3 Prudential Life (H)									
110. -AST Intl Equity (formerly AST JP Morgan Intl Equity)	A	Dividend	J	T					
111. -AST MFS Global Equity	A	Dividend	J	T					
112. -AST Large Cap Growth	A	Dividend	J	T					
113. -PSF Small Cap Value	A	Dividend	J	T					
114. -Fidelity VIP Midcap	A	Dividend	J	T					
115. -PSF Global	A	Dividend	J	T					
116. -MFS Utilities Series 1C	A	Dividend	J	T					
117. -AST Large Cap Value	A	Dividend	J	T					
118. -PSF Stock Index	A	Dividend	K	T					
119. -AST Core Fixed Income	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)
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2. Value Codes (See Columns C1 and D3)
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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. -AST International Equity	A	Dividend	J	T					
121. HIMFX (incorrectly listed as HIMEX)	A	Dividend	K	T					
122. VYMI	A	Dividend	K	T					
123. VTV	A	Dividend	K	T					
124. MUB	A	Dividend			Sold	01/24/23	K	A	
125. EFA	A	Dividend	J	T					
126. Roanoke VAEDA Bond	A	Interest	K	T					
127. Citigroup	A	Dividend	J	T	Buy	03/23/23	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

Name of Person Reporting	Date of Report
Agee, George S.	04/30/2024

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

Name of Person Reporting	Date of Report
Agee, George S.	04/30/2024

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/ 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. § 13106)

Committee on Financial Disclosure
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