Annual, 2025

Financial Disclosure Report (AO Form 10)

Filer's Information
Agee, G. Steven
U.S. Court of Appeals - Fourth Circuit
Circuit Judge

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. Â§ 13141 et. seq., 5 U.S.C. Â§ 7353, and Judicial Conference regulations.

/s/ Agee, G. Steven [electronically signed on Jun 22, 2026 4:52pm by Agee, G. Steven in JEFS]
/s/ Agee, G. Steven [electronically signed on May 11, 2026 4:23pm by Agee, G. Steven in JEFS]

I. Positions

	ORGANIZATION/ENTITY NAME	ORGANIZATION/ENTITY TYPE	POSITION HELD
1.	Bridgewater College	University/College	Life Trustee
2.	Roanoke Equity Group, LLC	Limited Liability Company	Director

II. Agreements

I do not have any Agreements to report
No entries in this section

III A. Filer Non-Investment Income

	SOURCE	INCOME TYPE	INCOME AMOUNT	HONORARIUM DATE
1.	Commonwealth of Virginia-Retirement Income	Fixed Retirement / Pension Benefits	$85,000.00	

III B. Spouse Non-Investment Income

	SOURCE	DESCRIPTION	HONORARIUM	HONORARIUM AMOUNT	HONORARIUM DATE
1.	Carilion Clinic-Salary			$0.00	
2.	RGC Resources, Inc. - Director Fees			$0.00	
3.	Atlantic Union Bank - Director Fees			$0.00	
4.	Health Care Realty Trust Incorporated - Director Fees			$0.00	
5.	Change Healthcare - Consultant Fees			$0.00	
6.	Precigen, Inc. - Director Fees			$0.00	

IV. Reimbursements

I do not have any Reimbursements to report
No entries in this section

V. Gifts

I do not have any Gifts to report
No entries in this section

VI. Liabilities

I do not have any Liabilities to report
No entries in this section

VII. Investments and Trusts

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
1.	**AUB (formerly AMNB)**	$5,001 - $15,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
2.	**(H) SUWI, LLC - (H)**				
2-A.	-Rental Property #1 Roanoke, VA	$2,501 - $5,000	Distribution	$50,001 - $100,000	Estimated
3.	**Healthcare Realty Trust, Inc.**	$5,001 - $15,000	Dividend	$500,001 - $1,000,000	Cash/Market
4.	**Agee Mill, LLC**	$1,000 or less	Distribution	$50,001 - $100,000	Estimated
5.	**RGC Resources, Inc.**	$5,001 - $15,000	Dividend	$500,001 - $1,000,000	Cash/Market
6.	**Edward Jones Cash Account**	$1,000 or less	Interest	$15,000 or less	Cash/Market
7.	**RCC Equity Group, LLC**	$1,000 or less	Distribution	$15,001 - $50,000	Book Value
8.	**(H) IRA #1 - (H)**				
8-A.	-IGAAX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
8-B.	-ANWPX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-C.	-CWGIX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
8-D.	-AMRMX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
8-E.	-ANCFX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
8-F.	-CAIBX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-G.	-AMECX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-H.	-AMCPX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-I.	-AGTHX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
8-J.	-NEWFX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
9.	**(H) Retirement Account #1 Virginia Deferred Compensation Plan - (H)**				
9-A.	-VRS Stock Fund	$2,501 - $5,000	Dividend	$500,001 - $1,000,000	Cash/Market
9-B.	-Stable Value Fund	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
9-C.	-VRS Int'l Stock Fund	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
9-D.	-VRS Small/Mid Cap Stock Fund	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
10.	**(H) IRA #2 - (H)**				
10-A.	-IGAAX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-B.	-ANWPX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-C.	-CWGIX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-D.	-AMRMX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
10-E.	-ANCFX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
10-F.	-CAIBX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
10-G.	-AMECX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
10-H.	-AMCPX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
10-I.	-AGTHX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
10-J.	-NEWFX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
11.	**(H) Retirement Account #2 Carilion Health System Sec 403(b) Plan - (H)**				
11-A.	-Fidelity Total Bond Fund	$1,000 or less	Dividend	$15,000 or less	Cash/Market
11-B.	-Loomis Soyles Small Cap Growth Inst	$1,000 or less	Dividend	$15,000 or less	Cash/Market
11-C.	-Vanguard Instl Index I	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
12.	**(H) Retirement Acct #3 Carilion Health System Sec 457(b) Plan - (H)**				
12-A.	-Fidelity Total Bond Fund	$1,001 - $2,500	Dividend	$50,001 - $100,000	Cash/Market
12-B.	-J Hancock Disciplined Value R6	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
12-C.	-Vanguard Instl I	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
13.	**(H) Retirement Acct #4 Equivest TSA 501(c)(3) Plan - (H)**				
13-A.	-EQ Guaranteed Interest	$1,000 or less	Dividend	$15,000 or less	Cash/Market
13-B.	-EQ International Equity Index	$1,000 or less	Dividend	$15,000 or less	Cash/Market
13-C.	-EQ/AB Small Cap Growth	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
13-D.	-EQ/MidCap VAL managed Vol	$1,000 or less	Dividend	$15,000 or less	Cash/Market
13-E.	-EQ Value Equity	$1,001 - $2,500	Dividend	$15,001 - $50,000	Cash/Market
13-F.	-Equitable Multimanager Core Bond	$1,000 or less	Dividend	$15,000 or less	Cash/Market
13-G.	-Equitable Core Plus Bond	$1,000 or less	Dividend	$15,000 or less	Cash/Market
14.	**Life Insurance Policy #1 Natl Life Ins Co Whole Life**	$2,501 - $5,000	Dividend	$100,001 - $250,000	Cash/Market
15.	**GOCXX**	$1,000 or less	Interest	$15,000 or less	Cash/Market
16.	**OWLSX**	$15,001 - $50,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
17.	**OWSMX**	$15,001 - $50,000	Dividend	$250,001 - $500,000	Cash/Market
18.	**OWACX**	$15,001 - $50,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
19.	**OWCIX**	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
20.	**OWMBX**	$5,001 - $15,000	Dividend	$1,000,001 - $5,000,000	Cash/Market
21.	**BOTJ**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
22.	**IVV**	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
23.	**ATBYX**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
24.	**FWGIX**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
25.	**FUNFX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
26.	**GAFFX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
27.	**HGIFX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
28.	**FIFAX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
29.	**JPPEX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
30.	**MPVOX**	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Sep 10, 2025	$15,001 - $50,000

31.	**MFEKX**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
32.	**FNPFX**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
33.	**FNWFX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
34.	**TBCIX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
35.	**IEFA**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
36.	**IUSG**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
37.	**VO**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
38.	**VB**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
39.	**IUSV**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
40.	**IWR**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
41.	**CFIHX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
42.	**TFEBX**	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Sep 10, 2025	$15,001 - $50,000

43.	**(H) Retirement Acct #6 SEP (H)**				
43-A.	-IEMG	$1,000 or less	Dividend	$15,000 or less	Cash/Market
43-B.	-IJR	$1,000 or less	Dividend	$15,000 or less	Cash/Market
43-C.	-IVV	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
43-D.	-ISTB	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
43-E.	-VEU	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
43-F.	-VO	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
43-G.	-FEUPX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
43-H.	-FNWFX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
43-I.	-BAGIX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
43-J.	-MFEKX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
43-K.	-MITJX	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
43-L.	-PHYQX	$1,000 or less	Dividend	$15,000 or less	Cash/Market

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD
43-M.	-TRGXX	$1,000 or less	Dividend	$15,000 or less	Cash/Market
44.	**ATFSX**	$1,000 or less	Dividend		

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Sep 10, 2025	$15,001 - $50,000

45.	**(H) IRA #3 - (H)**				
45-A.	-OWFIX	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
45-B.	-OWLSX	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
45-C.	-OWSMX	$5,001 - $15,000	Dividend	$100,001 - $250,000	Cash/Market
45-D.	-OWACX	$5,001 - $15,000	Dividend	$250,001 - $500,000	Cash/Market
45-E.	-OWCIX	$2,501 - $5,000	Dividend	$50,001 - $100,000	Cash/Market
46.	**MEIKX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
47.	**PDGIX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
48.	**Chorda Pharma, Inc.**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
49.	**Mytonomy, Inc.**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market
50.	**(H) Life Insurance Policy #3 Prudential Life (H)**				
50-A.	-AST Intl Equity	$1,000 or less	Dividend	$15,000 or less	Cash/Market
50-B.	-AST (formerly AST MFS, GLOBAL EQUITY) Large Cap Capacity	$1,000 or less	Dividend	$15,000 or less	Cash/Market
50-C.	-AST Large Cap Growth	$1,000 or less	Dividend	$15,000 or less	Cash/Market
50-D.	-PSF Small Cap Value	$1,000 or less	Dividend	$15,000 or less	Cash/Market
50-E.	-Fidelity VIP Midcap	$1,000 or less	Dividend	$15,000 or less	Cash/Market
50-F.	-PSF Global	$1,000 or less	Dividend	$15,000 or less	Cash/Market
50-G.	-MFS Utilities Series 1C	$1,000 or less	Dividend	$15,000 or less	Cash/Market
50-H.	-AST Large Cap Value	$1,000 or less	Dividend	$15,000 or less	Cash/Market
50-I.	-PSF Stock Index	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
50-J.	-AST Core Fixed Income	$1,000 or less	Dividend	$15,000 or less	Cash/Market
51.	**HIMFX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
52.	**VYMI**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
53.	**VTV**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
54.	**EFA**	$1,000 or less	Dividend	$15,000 or less	Cash/Market
55.	**Roanoke VAEDA Bond**	$1,000 or less	Interest	$15,001 - $50,000	Cash/Market
56.	**Citigroup**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market
57.	**Precigen**	$1,000 or less	Dividend	$100,001 - $250,000	Cash/Market
58.	**GOOGL**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Apr 10, 2025	$15,000 or less

59.	**Engines 4 Parts LLC**	$1,000 or less	Dividend		

ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

	DESCRIPTION	INCOME AMOUNT	INCOME TYPE	GROSS VALUE	VALUE METHOD

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Sold	Dec 4, 2025	$50,001 - $100,000
(2).	Buy	Sep 29, 2025	$50,001 - $100,000

60.	**Tiny Cargo Corp**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 5, 2025	$15,001 - $50,000

61.	**DG**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Jan 29, 2025	$15,000 or less

62.	**AMAT**	$1,000 or less	Dividend	$50,001 - $100,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Mar 17, 2025	$15,000 or less

63.	**HSDFX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 10, 2025	$15,000 or less

64.	**HWDFX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 10, 2025	$15,000 or less

65.	**LOGVX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 10, 2025	$15,001 - $50,000

66.	**LTROX**	$1,000 or less	Dividend	$15,001 - $50,000	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 10, 2025	$15,001 - $50,000

67.	**ITBFX**	$1,000 or less	Dividend	$15,000 or less	Cash/Market

Transactions	Transaction Type	Transaction Date	Transaction Value
(1).	Buy	Sep 5, 2025	$15,000 or less

VIII. Additional Information or Explanations

I do not have any Additional Information to report
No entries in this section