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 |
|---|---|---|
| ANDERSON, III, ROBERT L. | 11TH CIR. COURT OF APPEALS | 05/20/2025 |
| **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. CIRCUIT JUDGE (senior) | ☐ Nomination Date<br>☐ Initial ☑ Annual ☐ Final<br>**5b.** ☐ Amended Report | 01/01/2024<br>**to**<br>12/31/2024 |
| **7. Chambers or Office Address** | | |
| 56 Forsyth Street, N.W.<br>Atlanta, GA 30303 | | |

***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. | FELLOW | AMERICAN BAR FOUNDATION |
| 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. | 11/7/07 | R. Lanier Anderson, III/Chas. Schwab & Co. Cust/ IRA rollover |
| 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. | | | | | |
| 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 |
|---|---|
| **ANDERSON, III, ROBERT L.** | 05/20/2025 |

## 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. | SunTrust Bank - checking account | A | Interest | J | T | | | | | |
| 2. | Truist | C | Dividend | K | T | | | | | |
| 3. | TIAA-CREF Traditional Bond Fund (TIAA1) | C | Dividend | L | T | | | | | |
| 4. | TIAA-CREF Stock Fund (QCSTRX) | C | Dividend | K | T | | | | | |
| 5. | House and lot, Macon-Bibb County, GA | D | Rent | M | W | | | | | |
| 6. | Truist | A | Dividend | J | T | | | | | |
| 7. | I shares Russell 1000 Index | A | Dividend | K | T | | | | | |
| 8. | I shares Russell 2000 Value | A | Dividend | L | T | | | | | |
| 9. | I shares Russell 2000 Index | A | Dividend | L | T | | | | | |
| 10. | I shares Russell 1000 Index | A | Dividend | K | T | | | | | |
| 11. | I shares Russell 2000 Value | A | Dividend | K | T | | | | | |
| 12. | I shares Russell 2000 Index | A | Dividend | K | T | | | | | |
| 13. | I shares Russell 2000 Index (IRA) (H) | A | Dividend | J | T | | | | | |
| 14. | Genworth Life Ins. Co (whole life) | D | Dividend | M | T | | | | | |
| 15. | SunTrust Bank - money market (now Truist) | B | Interest | L | T | | | | | |
| 16. | H (RLA/CHARLES SCHWAB CUST IRA ROLLOVER) | | | | | | | | | See Part VIII |
| 17. | Schwab US Treas. Money Fund | A | Interest | 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 |
|---|---|
| **ANDERSON, III, ROBERT L.** | 05/20/2025 |

## 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. | Blackrock Strat. Inc. Opp. Port Instl. | A | Dividend | | | Sold | 05/17/24 | J | A | |
| 19. | iShares Core S&P500 (IVV) | A | Dividend | | | Sold | 05/20/24 | K | A | |
| 20. | ISHR,MSCI Emerg Mkt (EEMV) | A | Dividend | | | Sold | 05/20/24 | J | A | |
| 21. | iShares US Infrastructure (IFRA) | A | Dividend | | | Sold | 05/20/24 | K | A | |
| 22. | Cliffwater CorpLending (CCLFX) | A | Dividend | L | T | | | | | |
| 23. | Vanguard Short-term Bond (BSV) | A | Dividend | | | Sold | 05/20/24 | K | A | |
| 24. | Vanguard FTSE Dev (VEA) | A | Dividend | K | T | Buy | 05/20/24 | K | | |
| 25. | Vanguard FTSE Emerging (VWO) | A | Dividend | J | T | Buy | 05/20/24 | J | | |
| 26. | Vanguard MidCap ETF (VO) | A | Dividend | J | T | Buy | 05/20/24 | J | | |
| 27. | Vanguard S & P 500 ETF (VOO) | A | Dividend | K | T | Buy | 05/20/24 | K | | |
| 28. | Vanguard SmCap ETF (VB) | A | Dividend | J | T | Buy | 05/20/24 | J | | |
| 29. | H (RLA SCHWAB INDIVIDUAL ACCOUNT) | | | | | | | | | See Part VIII |
| 30. | Schwab US Treas Money Fund | A | Interest | K | T | | | | | |
| 31. | iShares Core S&P (IVV) | A | Dividend | N | T | | | | | |
| 32. | Vanguard Mid-Cap Growth (VOT) | A | Dividend | K | T | | | | | |
| 33. | Vanguard Mid Cap Value (VOE) | A | Dividend | K | T | Sold (part) | 10/24/24 | J | A | |
| 34. | JP Morgan Dvrsfd Rtrn Intrnl (JPIN) | A | Dividend | L | T | Sold (part) | 07/11/24 | K | A | |

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
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| **ANDERSON, III, ROBERT L.** | 05/20/2025 |

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|---|---|---|---|---|---|---|---|---|---|---|
| 35. | | | | | | Sold (part) | 07/12/24 | J | A | |
| 36. | ISHR EDG MSCI Min Vol EMG Mkt ETF (EEMV) | A | Dividend | | | Sold | 07/11/24 | K | A | |
| 37. | iShares Core Small Cap (IJR) | A | Dividend | L | T | | | | | |
| 38. | iShares MSCI Small Cap (SCZ) | A | Dividend | | | Sold | 07/11/24 | J | A | |
| 39. | iShares MSCI US Value (VLUE) | A | Dividend | | | Sold | 07/11/24 | J | A | |
| 40. | Cliffwater Corp Lending (CCLFX) | A | Dividend | K | T | | | | | |
| 41. | Pimco Income Instl (PIMIX) | A | Dividend | | | Sold | 07/11/24 | J | A | |
| 42. | iShares Core US Agg Bond (AGG) | A | Dividend | L | T | Buy | 07/12/24 | L | | |
| 43. | Vanguard Dev Mkt (VEA) | A | Dividend | | | Buy | 07/12/24 | L | | |
| 44. | | | | | | Sold | 08/09/24 | L | A | |
| 45. | Vanguard Emerg Mkt (VWO) | A | Dividend | J | T | Buy | 07/12/24 | J | | |
| 46. | Vanguard Total Intern'l Bond (BNDX) | A | Dividend | K | T | Buy | 07/12/24 | K | | |
| 47. | | | | | | Sold (part) | 10/24/24 | J | A | |
| 48. | iShares MSCI EAFE (EFA) | A | Dividend | L | T | Buy | 08/09/24 | L | | |
| 49. | Vanguard MidCap (VO) | A | Dividend | J | T | Buy | 10/29/24 | J | | |
| 50. | H (ADDITIONAL STIFEL ASSETS) | | | | | | | | | See Part VIII |
| 51. | Vanguard Appreciation | B | Dividend | M | T | | | | | |

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|---|---|---|---|---|---|---|---|---|---|
| 52. Loomis Sayles Strategic Fund (H) | B | Dividend | L | T | | | | | |
| 53. Osterweis Srategic Fund (IRA-[redacted]) | B | Dividend | K | T | Sold (part) | 11/11/24 | J | A | |
| 54. Osterweis Strategic Fund (IRA[redacted]) | C | Dividend | L | T | Sold (part) | 11/11/24 | J | A | |
| 55. Invesco Balanced Risk Alloc. CL Y (IRA-[redacted]) | B | Dividend | K | T | | | | | |

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| Name of Person Reporting | Date of Report |
|---|---|
| **ANDERSON, III, ROBERT L.** | 05/20/2025 |

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

Part VII, Line 16, is simply a heading to disclose that the following lines (lines 17-28) describe holdings or transactions in RLA Schwab IRA Rollover during 2024

Part VII. line 29 is simply a heading to disclose that the following lines (lines 30-49) describe holdings or transactions in the RLA Schwab individual account during 2024

Part VII line 50, is simply a heading to disclose that lines 51-55 describe holdings that were in Stifel brokerage accounts.

| Name of Person Reporting | Date of Report |
|---|---|
| **ANDERSON, III, ROBERT L.** | 05/20/2025 |

## 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/ ROBERT L. ANDERSON, III**

**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