

**FINANCIAL DISCLOSURE REPORT
FOR CALENDAR YEAR 2020**

*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) Steele, William H.	2. Court or Organization U.S. District Court, Southern District of Alabama	3. Date of Report 08/12/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Judge - Senior	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final	6. Reporting Period 01/01/2020 to 12/31/2020
	5b. ☐ Amended Report	
7. Chambers or Office Address 113 St Joseph Street Mobile, AL 36602		
IMPORTANT NOTES: <i>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>		

I. POSITIONS. *(Reporting individual only; see pp. 9-13 of filing instructions)*

☒ NONE *(No reportable positions.)*

POSITION

NAME OF ORGANIZATION/ENTITY

1.	
2.	
3.	
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.	

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Name of Person Reporting

Steele, William H.

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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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (yours, not spouse's)
1. 2020	Self-employed (musician)	\$300.00
2. 2020	First Church of Christ Scientist (reader fees)	\$1,350.00
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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>
1. 2020	Retirement Systems of Alabama - pension
2. 2020	Nationwide Retirement Solutions- deferred pay & retirement
3.	
4.	

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.**(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)*☒NONE *(No reportable reimbursements.)*

<u>SOURCE</u>	<u>DATES</u>	<u>LOCATION</u>	<u>PURPOSE</u>	<u>ITEMS PAID OR PROVIDED</u>
1.				
2.				
3.				
4.				
5.				

Name of Person Reporting	Date of Report
Steele, William H.	08/12/2021

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.		

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Name of Person Reporting

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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 Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period		C Gross value at end of reporting period		D Transactions during reporting period				
	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
1. Individual Assets (H)									
2. Regions Bank (cash)	A	Interest	J	T					
3. American Express High Yield Savings (cash)	A	Interest	L	T					
4. Nationwide Retirement Solutions (457b)	E	Distribution	M	T					
5. Rental property #1, Orange Beach, AL	E	Rent	N	W	Buy	01/31/20	N		
6. Rental property #2, Orange Beach, AL	C	Rent			Sold	02/24/20	N	F	
7. Account #1 (H)									
8. AB Cap Fd Inc Global REI(AREAX)	A	Dividend	K	T					
9. Alliance Bernstein Large-Cap Growth Class A (APGAX)	B	Dividend	L	T					
10. Alliance Bernstein Sustainable Global Thematic Fund (ALTFX)	B	Dividend	K	T					
11. John Hancock Regional Bank (FRBAX)	B	Dividend	K	T					
12. PGIM Jennison Blend Fund Class A (PBQAX) See Note	B	Dividend	K	T					
13. Account #2 (H)									
14. Putnam International Growth Class A (PINOX)	A	Dividend			Sold	05/19/20	J		
15. Putnam Emerging Mkts Equity Fd Cl A (PEMMX)	A	Dividend	J	T	Buy	05/19/20	J		
16. AIG SunAmerica Focused Alpha Large Cap (SFLAX)	B	Dividend	J	T					
17. Account #3 (H)									

1 Income Gain Codes: (See Columns B1 and D4)	A =\$1,000 or less F =\$50,001 - \$100,000	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000	C =\$2,501 - \$5,000 H1 =\$1,000,001 - \$5,000,000	D =\$5,001 - \$15,000 H2 =More than \$5,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	J =\$15,000 or less N =\$250,001 - \$500,000 P3 =\$25,000,001 - \$50,000,000	K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	L =\$50,001 - \$100,000 P1 =\$1,000,001 - \$5,000,000 P4 =More than \$50,000,000	M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	
3 Value Method Codes (See Column C2)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	

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

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	(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)
18. American Funds Euro Pacific Growth (AEPGX)	A	Dividend	J	T					
19. AMG Timesquare Mid Cap Grwth Fd I (TQMIX)	B	Dividend	J	T	Sold (part)	03/05/20	J		
20.					Sold (part)	11/09/20	J	A	
21. American Funds The Bond Fund of America F2 (ABNFX)	A	Dividend	J	T					
22. American Funds Growth Fund of America (AGTHX)	B	Dividend	K	T					
23. American Funds Growth Fd of Amer F2 (GFFFX)	A	Dividend	K	T	Sold (part)	03/05/20	J		
24.					Sold (part)	11/09/20	J	A	
25. American Funds New World Fd F2 (NFFFX)	A	Dividend	K	T	Buy (add'l)	03/05/20	J		
26.					Sold (part)	11/09/20	J	A	
27. American Funds Wash Mut Fd F2 (WMFFX)	B	Dividend	K	T	Buy (add'l)	03/05/20	J		
28.					Sold (part)	11/09/20	J	A	
29. Principal Fds Inc Midcap Fd I (PCBIX)	A	Dividend	J	T	Sold (part)	11/09/20	J	A	
30. American Funds Europac Grwth Fd F2 (AEPFX)	A	Dividend	K	T	Sold (part)	03/05/20	J		
31.					Sold (part)	11/09/20	J	A	
32. Invesco Oppenheimer Dev Mkts Cl Y (ODVYX)	A	Dividend	K	T	Buy (add'l)	03/05/20	J		
33.					Sold (part)	11/09/20	J	A	
34. Pimco Fds Pac Invnt Mgmt Ser Emerg Mkts I (PEBIX)	A	Dividend	J	T					

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35. Putnam Fd Emerging Mkts Equity Fd Cl A (PEMMX)	A	Dividend	K	T					
36. Putnam Growth Opportunities Fund Class A (POGAX)	D	Dividend	N	T					
37. SmallCap World Fd Inc Cl F2 (SMCFX)	A	Dividend	J	T	Sold (part)	11/09/20	J	A	
38. Virtus Funds Virtus Vontobel Emg Mkts Opps I (HIEMX)	A	Dividend			Sold	06/16/20	J		
39. Victory Sycamore Small Co Opp Fd I (VSOIX)	B	Dividend	K	T	Buy (add'l)	03/05/20	J		
40. Victory Port Rs Sm Cap Growth Fd Y (RSYEX)	B	Dividend	J	T	Sold (part)	11/09/20	J	A	
41. Delaware Group Equity FDS II-Value Fd (DDVIX)	A	Dividend			Sold	03/05/20	J		
42. Jensen Portfolio Inc Cl I Shs (JENIX)	B	Dividend	J	T	Buy (add'l)	03/05/20	J		
43.					Sold (part)	11/09/20	J	A	
44. John Hancock Funds III Disc Val Mid Cap Fd (JVMIX)	A	Dividend	K	T	Buy (add'l)	03/05/20	J		
45. PGIM High Yld Cl Z (PHYZX)	A	Dividend	J	T					
46. Account #4 (H)									
47. Wells Fargo Standard Bank Deposit (cash)	A	Interest	J	T					
48. Abbott Laboratories (ABT)	A	Dividend	J	T					
49. Accenture PLC (ACN)	A	Dividend	J	T					
50. AFLAC Inc (AFL)	A	Dividend	J	T					
51. Air Products & Chemicals Inc (APD)	A	Dividend	J	T					

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52. Amgen Inc (AMGN)	A	Dividend	J	T					
53. Analog Devices, Inc. (ADI)	A	Dividend	J	T					
54. Apple Inc.	A	Dividend	J	T					
55. AT&T (T)	A	Dividend	J	T					
56. Automatic Data Processing (ADP)	A	Dividend	J	T					
57. Becton Dickinson & Co (BDX)	A	Dividend	J	T					
58. BlackRock Inc (BLK)	A	Dividend	J	T					
59. Chevron Corp (CVX)	A	Dividend	J	T					
60. Chubb LTD (CB)	A	Dividend	J	T					
61. Cisco Systems Inc (CSCO)	A	Dividend	J	T					
62. Clorox Co (CLX)	A	Dividend	J	T					
63. Colgate-Palmolive Co (CL)	A	Dividend	J	T					
64. Comcast Corp New Cl A (CMCSA)	A	Dividend	J	T	Buy	01/29/20	J		
65. Eaton Vance Corp (EV)	A	Dividend	J	T					
66. Emerson Electric Co (EMR)	A	Dividend	J	T					
67. Eversource Energy (ES)	A	Dividend	J	T					
68. Exxon Mobil (XOM)	A	Dividend	J	T					

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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69. Factset Research Systems (FDS)	A	Dividend	J	T					
70. General Dynamics (GD)	A	Dividend	J	T					
71. L3Harris Corp (HRS) see note	A	Dividend	J	T					
72. Illinois Tool Works Inc (ITW)	A	Dividend	J	T					
73. Johnson & Johnson (JNJ)	A	Dividend	J	T					
74. JP Morgan Chase & Co (JPM)	A	Dividend	J	T					
75. Linde PLC (LIN)	A	Dividend	J	T					
76. Lowe's Companies (LOW)	A	Dividend	J	T					
77. McDonald's Corp (MCD)	A	Dividend	J	T					
78. Medtronic Inc (MDT)	A	Dividend	J	T					
79. Microsoft Corp (MSFT)	A	Dividend	K	T					
80. NextEra Energy Inc (NEE)	A	Dividend	J	T					
81. Nike Inc (NKE)	A	Dividend	J	T					
82. Norfolk Southern (NSC)	A	Dividend	J	T					
83. Novartis AG (NVS)	A	Dividend	J	T					
84. Paychex Inc (PAYX)	A	Dividend	J	T					
85. PepsiCo Inc (PEP)	A	Dividend	J	T					

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86. Phillips 66 (PSX)	A	Dividend	J	T					
87. Polaris Industries (PII)	A	Dividend			Sold	06/12/20	J		
88. Procter & Gamble (PG)	A	Dividend	J	T					
89. Sysco Corp (SYY)	A	Dividend	J	T					
90. Target Corp (TGT)	A	Dividend	J	T					
91. Unitedhealth Group Inc (UNH)	A	Dividend	J	T	Buy	04/27/20	J		
92. Raytheon Technologies Corp (RTX)	A	Dividend	J	T					
93. US Bancorp (USB)	A	Dividend	J	T					
94. VF Corp (VFC)	A	Dividend	J	T					
95. Walmart Inc (WMT)	A	Dividend	J	T					
96. WEC Energy Group (WEC)	A	Dividend	J	T					
97. 3M Co (MMM)	A	Dividend	J	T					
98. Account #5 (H)									
99. Alliance Bernstein Large Capital Growth (APGAX)	B	Dividend	L	T					
100. Fidelity New Markets Income Fd CL A (FGVMX)	A	Dividend	K	T					
101. Fundamental Investors Inc. (American Funds) (ANCFX)	C	Dividend	M	T					
102. Growth Fund of America (American Funds) (AGTHX)	E	Dividend	M	T					

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103. Franklin Mutual Shares (TESIX)	B	Dividend	K	T					
104. New Economy Fund (American Funds) (ANEFX)	B	Dividend	L	T					
105. Putnam Invt Fds Multi-Cap Value Fund (PMVAX)	D	Dividend	L	T					
106. Washington Mutual (American Funds) (AWSHX)	C	Dividend	M	T					
107. Account #6 (H)									
108. FIDVIP Free 2020 SVC 2 (FFRTT)		None	M	T					
109. NW AMFDS NVIT ASSTALLOC II		None	M	T					
110. NW NVIT INV DEST CAPAPP II		None	M	T					

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

Part VII, Account #6 is a Nationwide Destination B Variable Annuity; underlying assets are listed in Part VII.

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value, per page 42 of the filing instructions.

Putnam Fd Emerging Mkts Equity Fd C1 A (PEMMX) was Putnam Intl. Growth Fund Class A (PINOX).
Raytheon Technologies Corp (RTX) was United Technologies Corp(UTX).

Rental property #1, Orange Beach, AL was purchased from [REDACTED] [REDACTED].

Rental property #2, Orange Beach, AL was sold to [REDACTED].

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Name of Person Reporting

Steele, William H.

Date of Report

08/12/2021

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/ William H. Steele**

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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