

# FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2013

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

|                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                     |                                                                  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| <b>1. Person Reporting</b> (last name, first, middle initial)<br><br>BURNS, MICHELLE H.                                                                                                                   | <b>2. Court or Organization</b><br><br>Phoenix, District Court                                                                                                                                                                                                                                      | <b>3. Date of Report</b><br><br>02/20/2015                       |
| <b>4. Title</b> (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)<br><br>Magistrate Judge full-time                                                    | <b>5a. Report Type</b> (check appropriate type)<br><input type="checkbox"/> Nomination <input type="checkbox"/> Date<br><input type="checkbox"/> Initial <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Final<br><b>5b.</b> <input checked="" type="checkbox"/> Amended Report | <b>6. Reporting Period</b><br><br>01/01/2013<br>to<br>12/31/2013 |
| <b>7. Chambers or Office Address</b><br><br>Sandra Day O'Connor Courthouse<br>401 W. Washington St. SPC 12<br>Phoenix, Arizona 85003-2146                                                                 |                                                                                                                                                                                                                                                                                                     |                                                                  |
| <p align="center"><b>IMPORTANT NOTES:</b> The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.</p> |                                                                                                                                                                                                                                                                                                     |                                                                  |

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

☐ NONE (No reportable positions.)

POSITION

NAME OF ORGANIZATION/ENTITY

|                 |                         |
|-----------------|-------------------------|
| 1. Board Member | Federal Bar Association |
| 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

BURNS, MICHELLE 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><br>(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.)*

| <u>DATE</u> | <u>SOURCE AND TYPE</u>                       |
|-------------|----------------------------------------------|
| 1. 2013     | Burns, Nickerson, and Taylor, S-Corp. salary |
| 2.          |                                              |
| 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. Federal Bar Association | 01/24/2013-01/25/2013 | San Antonio, Texas       | Board Meeting                                             | transportation, hotel, meals  |
| 3. U.S. Courts             | 04/03/2013-04/04/2013 | Palm Springs, California | Ninth Circuit Wellness<br>Committee Retirement<br>Seminar | transportation, hotel, meals  |
| 4. Federal Bar Association | 04/25/2013-04/26/2013 | Arlington, Virginia      | Board Meeting                                             | hotel, transportation, meals  |
| 5. Federal Bar Association | 07/11/2013-07/12/2013 | Arlington, Virginia      | Leadership Training                                       | transportation, hotel, meals  |
| 6. Federal Bar Association | 09/24/2013-09/29/2013 | San Juan, Puerto Rico    | Annual Convention, Board<br>Meeting                       | transportation, hotel, meals  |

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| Name of Person Reporting | Date of Report |
|--------------------------|----------------|
| BURNS, MICHELLE H.       | 02/20/2015     |

|    |                                                                |                       |                  |                        |                              |
|----|----------------------------------------------------------------|-----------------------|------------------|------------------------|------------------------------|
| 7. | Kansas State University<br>Law School Endowment<br>Association | 10/21/2013-10/22/2013 | Lawrence, Kansas | Lectures at Law School | transportation, hotel, meals |
|----|----------------------------------------------------------------|-----------------------|------------------|------------------------|------------------------------|

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**V. GIFTS.** *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*NONE *(No reportable gifts.)*SOURCEDESCRIPTIONVALUE

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.)*CREDITORDESCRIPTIONVALUE 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                 |   |              |   |   |             |          |   |  |  |
|-------------------------------------------------|---|--------------|---|---|-------------|----------|---|--|--|
| 1. Interest Checking Account Bank of America    | A | Interest     | J | T |             |          |   |  |  |
| 2. Partnership - Burns Fulton                   | C | Distribution | L | U |             |          |   |  |  |
| 3. Interest checking wells fargo bank           | A | Interest     | J | T |             |          |   |  |  |
| 4. Fidelity Investments Brokerage Account (751) |   |              |   |   |             |          |   |  |  |
| 5. ---Fidelity Cash Account                     | A | Interest     | M | T |             |          |   |  |  |
| 6. ---Blackrock Emerg Mkts                      | A | Dividend     | J | T |             |          |   |  |  |
| 7. Fidelity Investments Managed Acct (502)      |   |              |   |   |             |          |   |  |  |
| 8. ---Fid. Advior Growth                        | A | Dividend     | J | T | Buy         | 11/04/13 | J |  |  |
| 9. ---Fid. Intl Small Cap Opp                   | A | Dividend     | J | T | Buy         | 11/04/13 | J |  |  |
| 10. ---Fid. Adv. Int'l Discv                    | A | Dividend     | J | T | Buy         | 11/04/13 | J |  |  |
| 11.                                             |   |              |   |   | Buy (add'l) | 12/17/13 | J |  |  |
| 12. ---Fid. Emerging Mkts                       | A | Dividend     | J | T | Buy         | 11/04/13 | J |  |  |
| 13. ---Fid. Low Priced Stock                    | A | Dividend     | J | T | Buy         | 11/04/13 | J |  |  |
| 14.                                             |   |              |   |   | Buy (add'l) | 11/22/13 | J |  |  |
| 15. ---Fid. Small Cap Value                     | A | Dividend     | J | T | Buy         | 11/04/13 | J |  |  |
| 16.                                             |   |              |   |   | Buy (add'l) | 11/22/13 | J |  |  |
| 17. ---Fid. Value Strategies                    | A | Dividend     | J | T | Buy         | 11/04/13 | J |  |  |

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

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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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                   |   |          |   |   |                |          |   |   |  |
|-----------------------------------|---|----------|---|---|----------------|----------|---|---|--|
| 18. ---Acad. Emerg. Mkts PIC      | A | Dividend |   |   | Buy            | 11/04/13 | J |   |  |
| 19.                               |   |          |   |   | Sold           | 12/17/13 | J | A |  |
| 20. ---Artisan SmCap Fund Inv     | A | Dividend | J | T | Buy            | 11/22/13 | J |   |  |
| 21. ---BlackRock Natl Muni Fund   | A | Dividend | K | T | Buy            | 11/04/13 | K |   |  |
| 22. ---Causewy Internl Value      | A | Dividend | J | T | Buy            | 12/17/13 | J |   |  |
| 23. ---Drefus Oppt Midcp Value    | A | Dividend |   |   | Buy            | 11/04/13 | J |   |  |
| 24.                               |   |          |   |   | Sold           | 11/22/13 | J | A |  |
| 25. ---Franklin Fed. Tax Free Cl. | A | Dividend | J | T | Buy            | 11/04/13 | J |   |  |
| 26. ---Goldman Sachs Sm. Cap Val. | A | Dividend |   |   | Buy            | 11/04/13 | J |   |  |
| 27.                               |   |          |   |   | Sold           | 11/22/13 | J | A |  |
| 28. ---Harbor Internl Admin.      | A | Dividend |   |   | Buy            | 11/04/13 | J |   |  |
| 29.                               |   |          |   |   | Sold           | 11/22/13 | J | A |  |
| 30. ---Oakmark Fund I             | A | Dividend | J | T | Buy            | 11/04/13 | J |   |  |
| 31. ---Oakmark Internl Cl I       | A | Dividend |   |   | Buy            | 11/04/13 | J |   |  |
| 32.                               |   |          |   |   | Sold           | 11/22/13 | J | A |  |
| 33. ---ING Gobal Real Est Cl A    | A | Dividend | J | T | Buy            | 11/04/13 | J |   |  |
| 34.                               |   |          |   |   | Buy<br>(add'l) | 11/22/13 | J |   |  |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
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| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

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|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 35. ---IShares Russell Midcap Val                                                                                           | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/06/13                | J                               |                                |                                                                   |
| 36. ---IShares Russel Mdep Grwth                                                                                            | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/26/13                | J                               |                                |                                                                   |
| 37. ---IShares Russell 1000 Val.                                                                                            | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/06/13                | J                               |                                |                                                                   |
| 38. ---IShares Russell 2000 ETF                                                                                             | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/25/13                | K                               |                                |                                                                   |
| 39. ---MFS Internl Value Fund                                                                                               | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 40. ---Manning & Napier Wld Opp                                                                                             | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 41.                                                                                                                         | A                                       | Dividend                                      | J                                               | T                                         | Buy<br>(add'l)                                  | 12/17/13                | J                               |                                |                                                                   |
| 42. ---Morgan Stanley MC Grwth                                                                                              | A                                       | Dividend                                      |                                                 |                                           | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 43.                                                                                                                         |                                         |                                               |                                                 |                                           | Sold                                            | 11/22/13                | K                               | A                              |                                                                   |
| 44. ---AEW Real Estate FD CL                                                                                                | A                                       | Dividend                                      |                                                 |                                           | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 45.                                                                                                                         |                                         |                                               |                                                 |                                           | Sold                                            | 11/22/13                | J                               | A                              |                                                                   |
| 46. ---Nuveen Intern Dur Muni                                                                                               | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 47. ---Oppenheimer Interl Grw A                                                                                             |                                         |                                               |                                                 |                                           | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 48.                                                                                                                         |                                         |                                               |                                                 |                                           | Buy<br>(add'l)                                  | 12/17/13                | J                               |                                |                                                                   |
| 49. ---Prudntl Jenn MD Cap Gth                                                                                              | A                                       | Dividend                                      |                                                 |                                           | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 50.                                                                                                                         |                                         |                                               |                                                 |                                           | Sold                                            | 12/13/13                | J                               | A                              |                                                                   |
| 51. ---RS Small Cap Gwth CL Y                                                                                               | A                                       | Dividend                                      |                                                 |                                           | Buy                                             | 11/04/13                | J                               |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
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|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 52.                                                                                                                         |                                         |                                               |                                                 |                                           | Sold                                            | 11/22/13                | J                               | A                              |                                                                   |
| 53. ---T Rowe Price Internl Stock                                                                                           | A                                       | Dividend                                      |                                                 |                                           | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 54.                                                                                                                         |                                         |                                               |                                                 |                                           | Sold                                            | 12/17/13                | J                               | A                              |                                                                   |
| 55. ---T Rowe Price Overs Stk Fnd                                                                                           | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 56. ---T Rowe Price SmCp Stk adv                                                                                            | A                                       | Dividend                                      |                                                 |                                           | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 57.                                                                                                                         |                                         |                                               |                                                 |                                           | Sold                                            | 11/22/13                | J                               | A                              |                                                                   |
| 58. ---SPDR S&P500 EFT Tr Unit                                                                                              | A                                       | Dividend                                      | K                                               | T                                         | Buy                                             | 11/06/13                | K                               |                                |                                                                   |
| 59. ---Sector SPDR TR Shs Ben int                                                                                           | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/06/13                | J                               |                                |                                                                   |
| 60. ---Tmpton Frontr Mkts FAC                                                                                               | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 61. ---Tmpton Global Bond cl A                                                                                              | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 62. ---Wells Fargo Sht Tem Muni                                                                                             | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/04/13                | J                               |                                |                                                                   |
| 63. IRA #1 (695)                                                                                                            |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 64. --Fidelity Small Cap                                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 65. --Fidelity ContraFund                                                                                                   | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 66. --Fidelity Equity Income                                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 67. --Fidelity Dividend Growth                                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 68. --Fidelity Export and intern'l                                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
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| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

BURNS, MICHELLE H.

Date of Report

02/20/2015

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                 |   |          |   |   |  |  |  |  |  |
|---------------------------------|---|----------|---|---|--|--|--|--|--|
| 69. --Fidelity int'l discovery  | A | Dividend | J | T |  |  |  |  |  |
| 70. --Nokia OYJ ADR             | A | Dividend | J | T |  |  |  |  |  |
| 71. --Fidelity Cash Reserves    | A | Interest | K | T |  |  |  |  |  |
| 72. --Yum! Brank Inc.           | A | Dividend | J | T |  |  |  |  |  |
| 73. --Mathews China Fund        | A | Dividend | J | T |  |  |  |  |  |
| 74. --Cisco SysInc              | A | Dividend | J | T |  |  |  |  |  |
| 75. --General Electric          | A | Dividend | J | T |  |  |  |  |  |
| 76. IRA #2 (687)                |   |          |   |   |  |  |  |  |  |
| 77. --Fidelity Contrafund       | A | Dividend | K | T |  |  |  |  |  |
| 78. --Fidelity Equity Income    | A | Dividend | J | T |  |  |  |  |  |
| 79. --Fidelity Equity Income II | A | Dividend | J | T |  |  |  |  |  |
| 80. --Fidelity Cash Reserves    | A | Interest | K | T |  |  |  |  |  |
| 81. IRA #3 (R-840)              |   |          |   |   |  |  |  |  |  |
| 82. --Fidelity Cash Reserves    | A | Interest | J | T |  |  |  |  |  |
| 83. --Intel Corp.               | A | Dividend | J | T |  |  |  |  |  |
| 84. IRA #4 (R - 832)            |   |          |   |   |  |  |  |  |  |
| 85. --Fidelity Cash Reserves    | A | Interest | J | T |  |  |  |  |  |

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

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

BURNS, MICHELLE H.

Date of Report

02/20/2015

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                            |   |          |   |   |     |          |   |  |  |
|--------------------------------------------|---|----------|---|---|-----|----------|---|--|--|
| 86. IRA #5 (SEP 709)                       |   |          |   |   |     |          |   |  |  |
| 87. --Fidelity Stock Selector              | A | Dividend | K | T |     |          |   |  |  |
| 88. --Fidelity Asset Mgr                   | A | Dividend | K | T |     |          |   |  |  |
| 89. --Fidelity ContraFund                  | A | Dividend | K | T |     |          |   |  |  |
| 90. --Fidelity Low Price Stock             | A | Dividend | L | T |     |          |   |  |  |
| 91. --Fidelity Value Fund                  | A | Dividend | L | T |     |          |   |  |  |
| 92. --Fidelity Cash Reserves               | A | Interest | J | T |     |          |   |  |  |
| 93. Fidelity SEP IRA Managed Account (053) |   |          |   |   |     |          |   |  |  |
| 94. ---Strategic Advrs Core Fnd            | A | Dividend | K | T | Buy | 12/17/13 | K |  |  |
| 95. ---Strategic Advrs Grwth Fnd           | A | Dividend | K | T | Buy | 12/17/13 | K |  |  |
| 96. ---Strategic Advrs Value Fnd           | A | Dividend | K | T | Buy | 12/17/13 | K |  |  |
| 97. ---Strategic Advrs Emrgng mkts         | A | Dividend | J | T | Buy | 12/17/13 | J |  |  |
| 98. ---Strategic Advrs us oppt fnd         | A | Dividend | J | T | Buy | 12/17/13 | J |  |  |
| 99. ---Strategic Adv sml-mid cap           | A | Dividend | J | T | Buy | 12/17/13 | J |  |  |
| 100. ---Strategic Advrs Internl fnd        | A | Dividend | K | T | Buy | 12/17/13 | K |  |  |
| 101. ---Fidelity Short trm bond fnd        | A | Dividend | J | T | Buy | 12/17/13 | J |  |  |
| 102. ---Fidelity Total Bond                | A | Dividend | J | T | Buy | 12/17/13 | J |  |  |

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

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

BURNS, MICHELLE H.

Date of Report

02/20/2015

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

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| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 103. ---Strategic Adv shrt durtn fnd                                                                                        | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 12/17/13                | J                               |                                |                                                                   |
| 104. ---Strategic Adv income oppty                                                                                          | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 12/17/13                | J                               |                                |                                                                   |
| 105. ---Strategic Adv core incm fnd                                                                                         | A                                       | Dividend                                      | K                                               | T                                         | Buy                                             | 12/17/13                | K                               |                                |                                                                   |
| 106. ---FIMM mkt port inst cl                                                                                               | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 12/17/13                | J                               |                                |                                                                   |
| 107. ---Arden altertv strategies cl 1                                                                                       | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 12/17/13                | J                               |                                |                                                                   |
| 108. ---Blackstone alt multmgr 1                                                                                            | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 12/17/13                | J                               |                                |                                                                   |
| 109. ---Pimco total rtnn admin shs                                                                                          | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 12/17/13                | J                               |                                |                                                                   |
| 110. ---Templeton globl bond cl A                                                                                           | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 12/17/13                | J                               |                                |                                                                   |
| 111. IRA #6                                                                                                                 |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 112. --Blackrock Glbal                                                                                                      | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 113. Trust #1                                                                                                               |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 114. --Amgen                                                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 115. --BMY                                                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 116. --VOD                                                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 117. --ZMH                                                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 118. Trust #2                                                                                                               |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 119. --SBC Communications now AT&T                                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
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Name of Person Reporting

BURNS, MICHELLE H.

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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.)

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|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 120. Nationwide Retirement Solutions - deferred compensation acct                                                           |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 121. --Fidelity Contrafund                                                                                                  | B                                       | Dividend                                      | N                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 122. --State Str. Eq S&P 500                                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 123. Fidelity 529 Education Account (773)                                                                                   |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 124. --NH Portfolio 2015                                                                                                    | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 125. Fidelity 529 Education Account (765)                                                                                   |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 126. --NH Portfolio 2012                                                                                                    | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 127. Lawson Financial-Muni Bonds -John C. Lincoln Hosp                                                                      | B                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
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| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

BURNS, MICHELLE H.

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

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Name of Person Reporting

BURNS, MICHELLE H.

Date of Report

02/20/2015

## 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/ MICHELLE H. BURNS

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  
Suite 2-301  
One Columbus Circle, N.E.  
Washington, D.C. 20544