

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2016

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) Coleman, Sharon J.	2. Court or Organization Northern District of Illinois	3. Date of Report 10/10/2017
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) District Judge - active	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☒ Amended Report	6. Reporting Period 01/01/2016 to 12/31/2016
7. Chambers or Office Address 219 S. Dearborn Street - Chambers 1460 Chicago, Illinois 60604		
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 pp. 9-13 of filing instructions.)

☐ NONE (No reportable positions.)

<u>POSITION</u>	<u>NAME OF ORGANIZATION/ENTITY</u>
1. Adjunct professor	Northwestern University School of Law, Chicago, Illinois
2. Adjunct professor	Thr John Marshall Law School, Chicago, Illinois
3. Member	The Women's Board of University of Chicago
4. Advisory Board	Women's Bar Association of Illinois
5.	

II. AGREEMENTS. (Reporting individual only; see pp. 14-16 of filing instructions.)

☐ NONE (No reportable agreements.)

<u>DATE</u>	<u>PARTIES AND TERMS</u>
1. 1996	State of Illinois Employee Pension Fund: Pension upon retirement age 59.5
2. 1984	Cook County Employee Retirement Fund: Pension upon retirement age 59.5
3.	

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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. 2016	Northwestern University School of Law - teaching	\$2,500.00
2. 2016	The John Marshall Law School - teaching	\$3,000.00
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. 2016	Blue Cross Blue Shield of Michigan
2. 2016	EC-United
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.				

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

	<u>SOURCE</u>	<u>DESCRIPTION</u>	<u>VALUE</u>
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.)*

	<u>CREDITOR</u>	<u>DESCRIPTION</u>	<u>VALUE CODE</u>
1.	Bank of America (Part VII - Line 6)	Rental Property - Mortgage #1, Chicago, IL (Pt VII, line 3)	M
2.	Cardmember Service	Credit Card	K
3.			
4.			
5.			

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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) 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)
1. Planites Credit Union	A	Int./Div.	J	T					
2. Citibank	A	Interest	N	T					
3. Chase	A	Interest	N	T					
4. Rental Property #1 - Chicago, IL (Purchased 2007 \$340,000)	E	Rent	O	W					
5. State of Illinois Retirement Fund		None	M	W					
6. Merrill Lynch (H)									
7. - Merrill Lynch Money Market Account	A	Interest	J	T					
8. - Merrill Lynch Wealth Management Joint Account									
9. Thornburg Invstmt Income Builder Fund Cl I	A	Dividend	J	T	Buy	01/06/16	J		
10. Ivy Asset Strategy Fund Cl I	A	Dividend	J	T	Buy	01/27/16	J		
11. Blackrock Global Allocation Fund	A	Dividend			Sold	01/27/16	J	A	
12. Ivy Asset Strategy Fund Cl I	A	Dividend			Sold	05/09/16	J	A	
13. Merrill Lynch (H)									
14. - Merrill Lynch Money Market Account	A	Interest	J	T					
15. -Merrill Lynch Wealth Management IRA#1									
16. Firat Eagle Global Class I	A	Dividend			Sold	04/19/16	J	A	
17. Leuthold Core Investment Fund	A	Dividend			Sold	01/06/16	J	A	

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	P1 = \$1,000,001 - \$5,000,000 P4 = More than \$5,000,000	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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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) 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. Ivy Asset Strategy Fund C1 I	A	Dividend			Sold	05/09/16	K	A	
19. FPA Crescent Fund Instl C1	A	Dividend	J	T	Buy	01/06/16	J		
20. Permanent Portfolio Fund	A	Dividend			Sold	04/19/16	J	A	
21. Firat Eagle Global Class I	A	Dividend			Sold	07/19/16	J	A	
22. Leuthold Core Investment Fund	A	Dividend	J	T	Buy	04/19/16	J		
23. Ivy Asset Strategy Fund C1 I	A	Dividend	J	T	Buy	01/27/16	J		
24. FPA Crescent Fund Instl C1	A	Dividend	J	T	Buy	04/19/16	J		
25. Permanent Portfolio Fund	A	Dividend			Sold	07/19/16	J	A	
26. Firat Eagle Global Class I	A	Dividend			Sold	10/19/16	J	A	
27. Leuthold Core Investment Fund	A	Dividend	J	T	Buy	04/19/16	J		
28. Ivy Asset Strategy Fund C1 I	A	Dividend			Sold	05/09/16	J		
29. FPA Crescent Fund Instl C1	A	Dividend	J	T	Buy	04/19/16	J		
30. Permanent Portfolio Fund	A	Dividend	J	T	Buy	04/19/16	J		
31. Merrill Lynch (H)									
32. - Merrill Lynch Money Market Account	A	Interest	J	T					
33. -Merrill Lynch Wealth Management IRA #2									
34. Leuthold Core Investment Fund	A	Dividend	J	T	Buy	04/19/16	J		

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	
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35. Ivy Asset Strategy Fund C1 1	A	Dividend			Sold	05/09/16	J	A	
36. FPA Crescent Fund Instl C1	A	Dividend	J	T	Buy	07/19/16	K		
37. Permanent Portfolio Fund	A	Dividend	J	T	Buy	05/10/16	J		
38. Merrill Lynch (H)									
39. - Merrill Lynch Money Market Account	A	Interest	K	T					
40. -Merrill Lynch Wealth Management IRA Rollover									
41. iShares Russell 1000 Growth	A	Dividend	J	T	Buy	05/10/16	K		
42. iShares Russell 1000 Value	A	Dividend	J	T	Buy	05/10/16	K		
43. Wisdomtree EM Small Cap	A	Dividend	J	T	Buy	05/10/16	J		
44. iShares Russell 2000 Growth	A	Dividend	J	T	Buy	05/10/16	J		
45. iShares Russell 2000 Value	A	Dividend	J	T	Buy	05/10/16	J		
46. The Oakmark Int'l Fund	A	Dividend	J	T	Buy	05/10/16	J		
47. Firat Eagle Global Class I	A	Dividend	J	T	Buy	05/10/16	J		
48. Prudential Short Term Corp Bond Fund	A	Dividend			Sold	02/16/16	J	A	
49. iShares Russell 2000 Growth	A	Dividend	J	T	Buy	05/10/16	J		
50. John Hancock Income Fund	A	Dividend			Sold	01/06/16	J	A	
51. Oppenheimer Dev Mkts Fund	A	Dividend	J	T	Buy	05/10/16	J		

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	
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52. Oppenheimer Intl Small Co Fund	A	Dividend	J	T	Buy	05/10/16	J		
53. Aberdeen Global High Income Fund	A	Dividend	J	T	Buy	01/06/16	J		
54. Leuthold Core Investment Fund	A	Dividend	J	T	Buy	05/10/16	J		
55. Ivy Asset Strategy Fund C1 1	A	Dividend			Sold	05/09/16	L	A	
56. Lord Abbett Short Dur Income Fund	A	Dividend	J	T	Buy	04/19/16	K		
57. PIMCO Total Return Fund	A	Dividend	J	T	Buy	05/10/16	J		
58. Pear Tree Polaris Foreign Value Sm Cap Fd	A	Dividend			Sold	02/16/16	J	A	
59. Angel Oak Multi Strategy Income Fund	A	Dividend			Sold	01/06/16	J	A	
60. Mainstay Short duration High Yld Fund	A	Dividend			Sold	02/16/16	J	A	
61. FPA Crescent Fund Installation Cl	A	Dividend	J	T	Buy	01/06/16	J		
62. Templeton Global Bond Fund	A	Dividend			Sold	02/16/16	J	A	
63. Loomis Sayles Strategic Inc. Fd	A	Dividend	J	T	Buy	01/06/16	J		
64. Permanent Portfolio Fund	A	Dividend	J	T	Buy	07/19/16	K		
65. Pear Tree Polaris Foreign Val Sm Cap Fd	A	Dividend			Sold	07/19/16	J	A	
66. iShares Russell 1000 Growth	A	Dividend			Sold	07/19/16	K	B	
67. iShares Russell 1000 Value	A	Dividend			Sold	07/19/16	K	A	
68. Wisdom Tree EM Small Cap	A	Dividend			Sold	07/19/16	J	A	

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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 \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
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69. IShares Russell 2000 Growth	A	Dividend			Sold	07/19/16	J	A	
70. IShares Russell 2000 Value	A	Dividend			Sold	07/19/16	J	A	
71. The Oakmark Intl Fund	A	Dividend			Sold	07/19/16	J	A	
72. First Eagle Global Class I	A	Dividend	J	T	Buy	07/19/16	K		
73. Leuthold Core Investment FD	A	Dividend	J	T	Buy	07/19/16	K		
74. Prudential Short Term Corp Bond Fund	A	Dividend			Sold	01/06/16	J	A	
75. John Hancock Income Fund	A	Dividend	J	T	Buy	04/19/16	J		
76. Oppenheimer Dev Mkts Fund	A	Dividend			Sold	07/19/16	J	A	
77. Oppenheimer Intl Small Company Fund	A	Dividend			Sold	07/19/16	J	A	
78. Aberdeen Global High Income Fund	A	Dividend			Sold	02/16/16	J	A	
79. Ivy Asset Strategy Fund C1 I	A	Dividend	J	T	Buy	01/27/16	J		
80. Lord Abbett Short Our Income Fund	A	Dividend			Sold	01/06/16	J	A	
81. PIMCO Total Return Fund	A	Dividend			Sold	02/16/16	J	A	
82. Angel Oak Multi Strategy Income Fund	A	Dividend			Sold	02/16/16	J	A	
83. Mainstay Short Duration High Yld Fund	A	Dividend			Sold	01/06/16	J	A	
84. FPA Crescent fund Instl C1	A	Dividend			Sold	10/19/16	J	A	
85. Templeton Global Bond Fund	A	Dividend			Sold	01/06/16	J	A	

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86. Loomis Sayles Strategic Inc Fd	A	Dividend	J	T	Buy	05/10/16	J		
87. Permanent Portfolio Fund	A	Dividend	J	T	Buy	10/19/16	J		
88. iShares Russell 1000 Growth	A	Dividend			Sold	01/06/16	J	A	
89. iShares Russell 1000 Value	A	Dividend	J	T	Buy	01/06/16	J		
90. Wisdom Tree Em Small Cap	A	Dividend	J	T	Buy	01/06/16	J		
91. iShares Russell 2000 Growth	A	Dividend	J	T	Buy	01/06/16	J		
92. iShares Russell 2000 Value	A	Dividend	J	T	Buy	01/06/16	J		
93. The Oakmark Intl Fund	A	Dividend	J	T	Buy	01/06/16	K		
94. First Eagle Global Class I	A	Dividend			Sold	10/19/16	J	A	
95. Leuthold Core Investment Fund	A	Dividend	J	T	Buy	10/19/16	J		
96. Prudential Short Term Corp Bond Fund	A	Dividend	J	T	Buy	04/19/16	J		
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99. Oppenheimer Intl Small Co Fund	A	Dividend			Sold	01/06/16	J	A	
100. Aberdeen Global High Income Fund	A	Dividend	J	T	Buy	04/19/16	J		
101. Ivy Asset Strategy Fund C1 I	A	Dividend			Sold	02/16/16	J	A	
102. Lord Abbett Short Dur Income Fund	A	Dividend			Sold	02/16/16	J	A	

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103. PIMCO Total Return Fund	A	Dividend	J	T	Buy	04/19/16	J		
104. Angel Oak MultiStrategy Income Fund	A	Dividend	J	T	Buy	04/19/16	J		
105. Mainstay Short Duration High Yield Fund	A	Dividend	J	T	Buy	04/19/16	J		
106. FPA Crescent Fund Instl Cl	A	Dividend			Sold	02/16/16	J	A	
107. Templeton Global Bond Fund	A	Dividend	J	T	Buy	04/19/16	J		
108. Loomis Sayles Strategic Inc Fund	A	Dividend	J	T	Buy	04/19/16	J		
109. Permanent Portfolio Fund	A	Dividend	J	T	Buy	01/27/16	J		
110. Thornburg Inv Inc Builder Fund Cl 1	A	Dividend			Sold	01/27/16	J	A	
111. Thornburg Global Opp Fund Cl 1	A	Dividend	J	T	Buy	05/09/16	J		
112. Thornburg Global Opp Fund Cl 1	A	Dividend	J	T	Buy	07/19/16	J		
113. Blackrock Global Allocation Fd	A	Dividend			Sold	01/27/16	J	A	
114. Thornburg Global Opp Fund Cl 1	A	Dividend			Sold	05/09/16	K	B	
115. Thornburg Global Opp Fund Cl 1	A	Dividend	J	T	Buy	07/19/16	J		
116. Thornburg Global Opp Fund Cl 1	A	Dividend	J	T	Buy	10/19/16	J		
117. Thornburg Global Opp Fund Cl 1	A	Dividend	J	T	Buy	05/09/16	J		
118. iShares Russell 2000 Value	A	Dividend	J	T	Buy	05/10/16	J		
119. Pear Tree Val Sm Cap Fd Instl	A	Dividend	J	T	Buy	05/10/16	J		

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 = \$250,001 - \$500,000	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 \$5,000,000	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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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) 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)
120. Blackrock Global Allocation Fd	A	Dividend	J	T	Buy	01/06/16	J		
121. Blackrock Global Allocation Fd	A	Dividend	J	T	Buy	01/06/16	J		
122. Thornburg Inv. Income Builder Fund CL 1	A	Dividend	J	T	Buy	01/06/16	J		
123. Leuthold Core Investment Fund	A	Dividend	J	T	Buy	01/06/16	J		
124. Pear Tree Polaris Foreign Val Sm Cap Fd	A	Dividend	J	T	Buy	01/06/16	J		
125. First Eagle Global Class 1	A	Dividend			Sold	01/06/16	J	A	
126. Thornburg Inv. Income Builder Fund CL 1	A	Dividend			Sold	01/27/16	J	A	
127. Leuthold Core Investment Fund	A	Dividend			Sold	02/16/16	J	A	
128. Wisdom Tree EM Small Cap	A	Dividend			Sold	02/16/16	J	A	
129. Oppenheimer Dev Mkts Fund	A	Dividend			Sold	02/16/16	J	A	
130. Oppenheimer Intl Small Co Fund	A	Dividend			Sold	02/16/16	J	A	
131. IShares RS 1000 Growth	A	Dividend			Sold	02/16/16	J	A	
132. IShares RS 1000 Value	A	Dividend			Sold	02/16/16	J	A	
133. IShares RS 2000 Growth	A	Dividend	J	T	Buy	02/16/16	J		
134. IShares RS 2000 Value	A	Dividend			Sold	02/16/16	J	A	
135. The Oakmark Intl Fund	A	Dividend	J	T	Buy	02/16/16	J		
136. First Eagle Global Class 1	A	Dividend			Sold	02/16/16	J	A	

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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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) 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)
137. The Oakmark Intl Fund	A	Dividend			Sold	04/19/16	J	A	
138. Oppenheimer Dev Mkts Fund	A	Dividend			Sold	04/19/16	J	A	
139. Oppenheimer Intl Small Co Fd	A	Dividend	J	T	Buy	04/19/16	J		
140. Pear Tree Polaris Foreign Val Sm Cap Fd	A	Dividend	J	T	Buy	04/19/16	J		
141. iShares RS 1000 Growth	A	Dividend	J	T	Buy	04/19/16	J		
142. iShares RS 1000 Value	A	Dividend	J	T	Buy	04/19/16	J		
143. Wisdom Tree EM Small Cap	A	Dividend			Sold	04/19/16	J	A	
144. iShares RS 2000 Value	A	Dividend	J	T	Buy	04/19/16	J		
145. First Eagle Global Class I	A	Dividend	J	T	Buy	04/19/16	J		
146. FPA Crescent Fund Instl Cl	A	Dividend	J	T	Buy	04/19/16	J		
147. Leuthold Core Investment Fund	A	Dividend	J	T	Buy	04/19/16	J		
148. Permanent Portfolio Fund	A	Dividend	J	T	Buy	04/19/16	J		
149. Thornburg Global Opp Fund CL 1	A	Dividend	J	T	Buy	05/09/16	L		
150. Thornburg Global Opp Fund CL 1	A	Dividend	J	T	Buy	05/10/16	J		
151. Oppenheimer Intl Small Co Fd	A	Dividend			Sold	05/10/16	J	A	
152. Pear Tree Polaris Foreign Val Sm Cap Fd	A	Dividend			Sold	05/10/16	J	A	
153. FPA Crescent Fund Instl Cl	A	Dividend			Sold	05/10/16	J	A	

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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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) 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)
154. Prudential Short Term Corp Bond Fund	A	Dividend	J	T	Buy	05/10/16	J		
155. Angel Oak MultiStrategy Income Fund	A	Dividend	J	T	Buy	05/10/16	J		
156. Templeton Global Bond Fund	A	Dividend	J	T	Buy	05/10/16	J		
157. iShares RS 1000 Growth	A	Dividend			Sold	05/10/16	J	A	
158. iShares RS 1000 Value	A	Dividend			Sold	05/10/16	J	A	
159. Wisdom Tree EM Small Cap	A	Dividend	J	T	Buy	05/10/16	J		
160. iShares RS 2000 Growth	A	Dividend			Sold	05/10/16	J	A	
161. iShares RS 2000 Value	A	Dividend			Sold	05/10/16	J	A	
162. First Eagle Global Class I	A	Dividend			Sold	05/10/16	J	A	
163. Leuthold Core Investment Fund	A	Dividend			Sold	05/10/16	J	A	
164. John Hancock Income Fund	A	Dividend	J	T	Buy	05/10/16	J		
165. Aberdeen Global High Income Fund	A	Dividend	J	T	Buy	05/10/16	J		
166. Lord Abbett Short Dur Income Fund	A	Dividend	J	T	Buy	05/10/16	J		
167. Mainstay Short Duration High Yield Fund	A	Dividend	J	T	Buy	05/10/16	J		
168. Permanent Portfolio Fund	A	Dividend			Sold	05/10/16	J	A	
169. The Oakmark Intl Fund	A	Dividend			Sold	05/10/16	J	A	
170. Deutsche Global Hi Inc Cl S	A	Dividend	J	T	Buy	05/24/16	K		

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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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) 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)
171. Thornburg Global Opp Fund CL 1	A	Dividend			Sold	07/19/16	J	A	
172. Deutsche Global Hi Inc Cl S	A	Dividend			Sold	07/19/16	J	A	
173. PIMCO Total Return Fund	A	Dividend	J	T	Buy	07/19/16	J		
174. Mainstay Short Duration High Yield Fund	A	Dividend	J	T	Buy	07/19/16	J		
175. Templeton Global Bond Fund	A	Dividend	J	T	Buy	07/19/16	J		
176. Loomis Sayles Strategic Inc Fd	A	Dividend			Sold	07/19/16	J	A	
177. Permanent Portfolio Fund	A	Dividend			Sold	07/19/16	K	B	
178. Pear Tree Polaris Foreign Val Sm Cap Fd	A	Dividend	J	T	Buy	07/19/16	J		
179. iShares Russell 1000 Growth	A	Dividend	J	T	Buy	07/19/16	K		
180. iShares RS 2000 Value	A	Dividend			Sold	07/19/16	J	A	
181. Leuthold Core Investment Fund	A	Dividend			Sold	07/19/16	J	A	
182. Prudential Short Term Corp Bond Fund	A	Dividend	J	T	Buy	07/19/16	J		
183. Oppenheimer Dev Mkts Fund	A	Dividend	J	T	Buy	07/19/16	J		
184. Oppenheimer Intl Small Co Fd	A	Dividend	J	T	Buy	07/19/16	J		
185. Aberdeen Global High Income Fund	A	Dividend			Sold	07/19/16	K	A	
186. Angel Oak MultiStrategy Income Fund	A	Dividend	J	T	Buy	07/19/16	J		
187. FPA Crescent Fund Installation Cl	A	Dividend			Sold	07/19/16	J	A	

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 \$5,000,000	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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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) 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)
188. The Oakmark Intl Fund	A	Dividend	J	T	Buy	07/19/16	K		
189. Lord Abbett Short Dur Income Fund	A	Dividend	J	T	Buy	07/19/16	J		
190. iShares Russell 1000 Growth	A	Dividend	J	T	Buy	10/19/16	J		
191. iShares RS 1000 Value	A	Dividend	J	T	Buy	10/19/16	J		
192. Wisdom Tree EM Small Cap	A	Dividend			Sold	10/19/16	J	A	
193. iShares RS 2000 Growth	A	Dividend	J	T	Buy	10/19/16	J		
194. iShares RS 2000 Value	A	Dividend			Sold	10/19/16	J	A	
195. Thornburg Global Opp Fund Cl 1	A	Dividend			Sold	10/19/16	J	A	
196. First Eagle Global Class 1	A	Dividend	J	T	Buy	10/19/16	J		
197. Deutsche Global Hi Inc Cl S	A	Dividend			Sold	10/19/16	J	A	
198. Oppenheimer Dev Mkts Fund	A	Dividend			Sold	10/19/16	J	A	
199. Pear Tree Polaris Foreign Val Sm Cap Fd	A	Dividend			Sold	10/19/16	J	A	
200. Angel Oak MultiStrategy Income Fund	A	Dividend	J	T	Buy	10/19/16	J		
201. FPA Crescent Fund Installation Cl	A	Dividend	J	T	Buy	10/19/16	J		
202. Permanent Portfolio Fund	A	Dividend	J	T	Buy	10/19/16	J		
203. Leuthold Core Investment Fund	A	Dividend	J	T	Buy	10/19/16	J		
204. Prudential Short Term Corp Bond Fund	A	Dividend	J	T	Buy	10/19/16	J		

1. Income Gain Codes:	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
(See Columns B1 and D4)	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	J = \$15,000 or less	K = \$15,001 - \$50,000	L = \$50,001 - \$100,000	M = \$100,001 - \$250,000	
(See Columns C1 and D3)	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	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
(See Column C2)	U = Book Value	V = Other	W = Estimated		

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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) 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)
205. Lord Abbett Short Dur Income Fund	A	Dividend	J	T	Buy	10/19/16	J		
206. PIMCO Total Return Fund	A	Dividend	J	T	Buy	10/19/16	J		
207. Mainstay Short Duration High Yield Fund	A	Dividend	J	T	Buy	10/19/16	J		
208. Templeton Global Bond Fund	A	Dividend	J	T	Buy	10/19/16	J		
209. Loomis Sayles Strategic Inc Fd	A	Dividend	J	T	Buy	10/19/16	J		
210. John Hancock Income Fund	A	Dividend	J	T	Buy	10/19/16	J		
211. Blackrock Global Allocation Fd	A	Dividend			Sold	01/27/16	J	A	
212.									
213.									
214.									
215.									
216.									
217.									
218.									
219.									
220.									
221.									

1. Income Gain Codes:	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
(See Columns B1 and D4)	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	J = \$15,000 or less	K = \$15,001 - \$50,000	L = \$50,001 - \$100,000	M = \$100,001 - \$250,000	
(See Columns C1 and D3)	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	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
(See Column C2)	U = Book Value	V = Other	W = Estimated		

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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) 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)
222.									
223.									
224.									
225.									
226.									
227.									
228.									
229.									

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

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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/ **Sharon J. Coleman**

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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