

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2017

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) Wolf, Mark L.	2. Court or Organization United States District Court District of Massachusetts	3. Date of Report 01/03/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Senior United States District Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☒ Amended Report	6. Reporting Period 01/01/2017 to 12/31/2017
7. Chambers or Office Address 1 Courthouse Way Suite 5110 Boston, MA 02210		
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. Chairman Emeritus, Director	Albert Schweitzer Fellowship
2. Chair	John William Ward Fellowship
3. Chair	Integrity Initiatives International
4. Adjunct Lecturer	Harvard University Kennedy School
5. Senior Fellow	Harvard University Carr Center for Human Rights

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.	
2.	
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. 2017	Harvard Kennedy School - Teaching	\$10,000.00
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.	
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.	COUNCIL ON FOREIGN RELATIONS, THIRD SECTOR NEW ENGLAND/INTEGRITY INITIATIVES INT'L	2/8-2/10/2017	D.C.	EDUCATIONAL PROGRAM	TRAVEL FOOD LODGING
2.	ASPEN INSTITUTE	3/26-3/27/2017	D.C.	EDUCATIONAL PROGRAM	TRAVEL FOOD LODGING
3.	THIRD SECTOR NEW ENGLAND/INTEGRITY INITIATIVES INT'L	4/1-4/8/2017	LONDON & OXFORD, GREAT BRITAIN	EDUCATIONAL PROGRAM	TRAVEL FOOD LODGING

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4.	THIRD SECTOR NEW ENGLAND/INTEGRITY INITIATIVES INT'L	4/16/2017	NEW YORK, NY	III BUSINESS MEETING	TRAVEL FOOD
5.	NAT'L ENDOWMENT FOR DEMOCRACY, THIRD SECTOR NEW ENGLAND/INTEGRITY INITIATIVES INT'L	4/24-4/25/2017	D.C.	EDUCATIONAL PROGRAM	TRAVEL FOOD LODGING
6.	CARNEGIE MELLON U. IN AUSTRALIA, NEW S. WALES INDEP. COMM'N AGAINST CORRUPTION	11/03-11/17/2017	ADELAIDE, CANBERRA & SYDNEY, AUSTRALIA	EDUCATIONAL PROGRAM	TRAVEL FOOD LODGING
7.					
8.					
9.					
10.					
11.					

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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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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 I (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. IRA #1 (H) 65									
2. -iShares Edge MSCI Min		None			Sold	10/02/17	J		
3. -iShares IBOXX High Yield	A	Dividend			Sold	10/02/17	J		
4. -iShares iBoxx Investment Grade Corp (LOD)	A	Dividend			Sold	10/02/17	J		
5. - iShares Gold ETF f/k/a iShares Gold Trust	A	Dividend			Sold	10/02/17	K		
6. -iShares JPMorgan USD MTS Bond ETF	A	Dividend			Sold	10/02/17	K		
7. -iShares MSCI Hong Kong ETF		None			Sold	10/02/17	J		
8. -iShares Russell 2000 Index	A	Dividend			Sold	10/02/17	J		
9. -iShares TIPS Bond Fund f/k/a iShares Barclays TIPS Bd fd	A	Dividend			Sold	10/02/17	J		
10. -iShares TR Bond 20+ Treasury Bond Fund	A	Dividend			Sold	10/02/17	J		
11. -iShares 7-10 Year Treasury f/k/a iShares Barclays 7-10 Year Treasury	A	Dividend			Sold	10/02/17	J		
12. -PIMCO Enhanced Short Matursou	A	Dividend			Sold	10/02/17	J		
13. -PowerShares QQQ Trust, Series 1	A	Dividend			Sold	10/02/17	J		
14. -Powershares S&P Low Volatility	A	Dividend			Sold	10/02/17	J		
15. -Schwab Govt Money Fund	A	Dividend			Sold	10/02/17	J		
16. -SPDR S&P 500 Fund	A	Dividend			Sold	10/02/17	J		
17. -Vanguard Dividend Appreciation Index	A	Dividend			Sold	10/02/17	K		

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)
18. -Vanguard FTSE Developed Markets ETF (X)	A	Dividend			Sold	10/02/17	J		
19. -Vanguard FTSE Emerging Markets ETF f/k/a Vang Emerging Markets	A	Dividend			Sold	10/02/17	J		
20. -Vanguard Global EX US f/k/a Int'l Equ Global ex-US Real Estate	A	Dividend			Sold	10/02/17	J		
21. -Vanguard Interim Term Corp Bd ETC	A	Dividend			Sold	10/02/17	J		
22. -Vanguard Total Stock Market Index	A	Dividend			Sold	10/02/17	J		
23.									
24. IRA #2 (H) (53)									
25. -iShares iBOXX high yield	A	Dividend			Sold	10/02/17	J		
26. -iShares Boxx INVT Grd Bond ETF	A	Dividend			Sold	10/02/17	J		
27. -iShares Commodities Select	A	Dividend			Sold	10/02/17	J		
28. -iShares Edge MSCI Min	A	Dividend			Sold	10/02/17	J		
29. -iSharesTrust ETF JP Morgan USD Emerging	A	Dividend			Sold	10/02/17	J		
30. -iShares Gold ETF f/k/a iShared Gold Trust	A	Dividend			Sold	10/02/17	J		
31. -iShares MSCI HK EFT Hong Kong	A	Dividend			Sold	10/02/17	J		
32. -iShares MSCI Jpn ETF Japan	A	Dividend			Sold	10/02/17	J		
33. -iShares MSCI EAF Min Volat Etf	A	Dividend			Sold	10/02/17	J		
34. -iShares Russell 2000 Index	A	Dividend			Sold	10/02/17	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	
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☐ 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)
35. -iShares TIPS Bond Fund f/k/a iShares Barclays TIPS Bd Fd 2.89%	A	Dividend			Sold	10/02/17	K		
36. -iShares Tr Bond 20+ year Treasury Bond Fund	A	Dividend			Sold	10/02/17	J		
37. -iShares 7-10 Year Treasury Bond Fund f/k/a iShares Barclays 7-10 Yr	A	Dividend			Sold	10/02/17	K		
38. -iShares 3-7 Year Treasury	A	Dividend			Sold	10/02/17	J		
39. -PIMCO Enhanced Shrt		None			Sold	10/02/17	J		
40. -PowerShares QQQ Trust, Series 1	A	Dividend			Sold	10/02/17	K		
41. -Powershares S&P Low Volatility	A	Dividend			Sold	10/02/17	J		
42. -Schwab Govt Money Fund	A	Dividend			Sold	10/02/17	J		
43. -SPDR S&P 500 ETF IV	A	Dividend			Sold	10/02/17	J		
44. -Vanguard Dividend Appreciation ETF	A	Dividend			Sold	10/02/17	J		
45. -Vanguard FTSE ETF Developed Markets	A	Dividend			Sold	10/02/17	J		
46. -Vanguard FTSE Emerg Mkts ETF f/k/a Vanguard Emerging Markets Index	A	Dividend			Sold	10/02/17	J		
47. -Vanguard Global ex-US f/k/a Vanguard Global ex-US Real Estate Estate	A	Dividend			Sold	10/02/17	J		
48. -Vanguard Intermediate Term Corp ETF	A	Dividend			Sold	10/02/17	J		
49. -Vanguard Total Bond ETF	A	Dividend			Sold	10/02/17	J		
50. -Vanguard Total Stock Market ETF	A	Dividend			Sold	10/02/17	J		
51.									

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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	(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)

52. BROKERAGE ACCOUNT #1 (H) (71)									
53. iShares Edge MSCI Min	A	Dividend			Sold	10/02/17	J		
54. iShares Commodities Select	A	Dividend			Sold	10/02/17	J		
55. iShares ETF Currency Hedge	A	Dividend			Sold	10/02/17	J		
56. iShares Floating Rate Note Fund	A	Dividend			Sold	10/02/17	J		
57. iShares Gold ETF Trust f/k/a iShares Gold Trust		None			Sold	10/02/17	J		
58. iShares iBoxx high yield	A	Dividend			Sold	10/02/17	J		
59. iShares IBOXX Inv Grd Bd	A	Dividend			Sold	10/02/17	J		
60. iShares JPMorgan USD MTS Bond ETF	A	Dividend			Sold	10/02/17	J		
61. iShares MSCI HK ETF Hong Kong	A	Dividend			Sold	10/02/17	J		
62. iShares Russell 2000 Index Fund	A	Dividend			Sold	10/02/17	J		
63. iShares Barclays 1-3 Year Treasury Bond Fund	A	Dividend			Sold	10/02/17	K		
64. iShares TIPS Bond ETF f/k/a iShares Barclays TIPS Bd FD 5.298%	A	Dividend			Sold	10/02/17	J		
65. iShares 7-10 Year Treasury Bond Fund	A	Dividend			Sold	10/02/17	J		
66. iShares 20+ Treasury Bond	A	Dividend			Sold	10/02/17	J		
67. PIMCO Enhanced Short Maturity Strgy ETF	A	Dividend			Sold	10/02/17	J		
68. PIMCO 0-5 Year High Yld		None			Sold	10/02/17	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 \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
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69. PowerShares QQQ Trust, Series 1	A	Dividend			Sold	10/02/17	K		
70. Schwab Government Money Fund	A	Dividend			Sold	10/02/17	J		
71. Vanguard Total Bond Mkt ETF f/k/a Vanguard Bond Index Fund	A	Dividend			Sold	10/02/17	K		
72. Vanguard Dividend Appreciation	A	Dividend			Sold	10/02/17	J		
73. Vanguard FTSE Developed Markets ETF		None			Sold	10/02/17	J		
74. Vanguard FTSE Emerging Markets ETF		None			Sold	10/02/17	J		
75. Vanguard Intermediate Term Corp Bond Fund	A	Dividend			Sold	10/02/17	J		
76. Vanguard Intl Eqty EFT	A	Dividend			Sold	10/02/17	J		
77. Vanguard Total Stock Market Index	A	Dividend			Sold	10/02/17	K		
78.									
79. BROKERAGE ACCOUNT #2 (H)									
80. McDonald's Corp	B	Dividend	L	T					
81. Schwab Govt Money Fund	A	Dividend	J	T					
82.									
83. BROKERAGE ACCOUNT #3 (H) (26)									
84. iShares Edge MSCI Min	A	Dividend			Sold	10/02/17	J		
85. iShares Gold ETF f/k/a iShares GoldTrust		None			Sold	10/02/17	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	
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)
86. iShares iBoxx High Yield	A	Dividend			Sold	10/02/17	K		
87. iShares iBoxx Invt Grd Bond ETF	A	Dividend			Sold	10/02/17	J		
88. iShares JPMorgan USD MTS Bond ETF	A	Dividend			Sold	10/02/17	J		
89. iShares MSCI Hong Kong	A	Dividend			Sold	10/02/17	J		
90. iShares Russell 2000 Index	A	Dividend			Sold	10/02/17	J		
91. iShares TIPS Bond ETF f/k/a iShares Barclays Fund 5.289%	A	Dividend			Sold	10/02/17	J		
92. iShares TR Bond 20+ Treasury Bond	A	Dividend			Sold	10/02/17	J		
93. iShares 7-10 Year Treasury f/k/a iShares Barclays 7-10 Bond	A	Dividend			Sold	10/02/17	J		
94. PIMCO Enhanced SHRT		None			Sold	10/02/17	J		
95. PowerShares QQQ Trust, Series 1	A	Dividend			Sold	10/02/17	K		
96. Powershares S&P Low Volatility	A	Dividend			Sold	10/02/17	J		
97. Schwab Govt Money Fund	A	Dividend			Sold	10/02/17	J		
98. SPDR S&P 500 Fund	A	Dividend			Sold	10/02/17	K		
99. Vanguard FTSE Developed Markets ETF	A	Dividend			Sold	10/02/17	J		
100. Vanguard FTSE Emerging Markets ETF f/k/ a Vanguard Emerging Mkts Index	A	Dividend			Sold	10/02/17	J		
101. Vanguard Global ex-US Real Est ETF f/k/a Vanguard Int'l Equity ETF	A	Dividend			Sold	10/02/17	J		
102. Vanguard Inter Term Corp Bd ETC	A	Dividend			Sold	10/02/17	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	
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)
103. Vanguard MSCI EAFE Index	A	Dividend			Sold	10/02/17	J		
104. Vanguard Total Bond Market ETF	A	Dividend			Sold	10/02/17	J		
105. Vanguard Total Stock Market Index	A	Dividend			Sold	10/02/17	J		
106. Vanguard Dividend Appreciation	A	Dividend			Sold	10/02/17	J		
107.									
108. BROKERAGE ACCOUNT #4 (H) (43)									
109. iShares Edge MSCI Min f/k/a MSCI EAFE Minimum Volatility	A	Dividend			Sold	10/02/17	J		
110. iShares Gold ETF f/k/a iShares Gold Trust		None			Sold	10/02/17	J		
111. iShares iBoxx High Yield	A	Dividend			Sold	10/02/17	J		
112. iShares iBoxx Inv Grade Bond ETF	A	Dividend			Sold	10/02/17	J		
113. iShares JPMorgan USD Mkts Bond ETF	A	Dividend			Sold	10/02/17	J		
114. iShares MSCI Hong Kong	A	Dividend			Sold	10/02/17	J		
115. iShares Russell 2000	A	Dividend			Sold	10/02/17	J		
116. iShares TIPS Bond ETF f/k/a iShares Barclays Tips Bond Fund 5.298%	A	Dividend			Sold	10/02/17	J		
117. iShares 20+ Yr Treasury Bond ETF f/k/a iShares Barclays20+ Yr Tr BD Fd	A	Dividend			Sold	10/02/17	J		
118. iShares 7-10 Year Treasury Bd ETF f/k/a iShares Barclays 7-10 Treasury	A	Dividend			Sold	10/02/17	J		
119. PIMCO Enhanced Short Maturity Strgy ETFa	A	Dividend			Sold	10/02/17	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	
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. PIMCO 0-5 Year High Yld		None			Sold	10/02/17	J		
121. PowerShares QQQ Trust, Series 1	A	Dividend			Sold	10/02/17	J		
122. Schwab Govt Money Fund	A	Dividend			Sold	10/02/17	J		
123. Vanguard Dividend Appreciation	A	Dividend			Sold	10/02/17	J		
124. Vanguard FTSE Developed Markets ETF		None			Sold	10/02/17	J		
125. Vanguard FTSE Emerging Markets ETF		None			Sold	10/02/17	J		
126. Vanguard Interm Term Corp Bd ETC	A	Dividend			Sold	10/02/17	J		
127. Vanguard Total Bond Market ETF	A	Dividend			Sold	10/02/17	J		
128. Vanguard Total Stock Market Index	A	Dividend			Sold	10/02/17	J		
129.									
130. 3 E Brokerage Account (H) 51									
131. Fidelity Treasury Money Market Fd (FZFX)	A	Dividend	J	T	Buy	10/03/17	J		
132. Fidelity Total Bond ETF (FBND)	A	Dividend	J	T	Buy	10/03/17	J		
133. iShares Inc MSCI Jpn ETF		None	K	T	Buy	12/05/17	K		
134. iShares MSCI FRNTR 100 ETF (FM)	A	Dividend	J	T	Buy	10/03/17	J		
135. iShares TR MSCI ACWI ETF (ACWI)	A	Dividend	L	T	Buy	10/03/17	L		
136. iShares Trust MSCI India Index FD (INDA)	A	Dividend	J	T	Buy	10/03/17	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	
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. iShares TIPS Bond ETF (TIP)	A	Dividend	K	T	Buy	10/03/17	K		
138. iShares TR Barclays 7 - 10 Yr (IEF)	A	Dividend	J	T	Buy	10/03/17	J		
139. iShares US ETF Tr Short Maturity Bd (NEAR)	A	Dividend	K	T	Buy	10/03/17	K		
140.					Buy (add'l)	12/05/17	J		
141. iShares Gold Trust iShares (IAU)	A	Dividend	J	T	Buy	10/03/17	J		
142. Powershares QQQ Tr Unit Ser 1(QQQ)	A	Dividend	K	T	Buy	10/03/17	K		
143.					Sold (part)	12/05/17	J		
144. SPDR S&P 500 ETF	A	Dividend	J	T	Buy	10/03/17	J		
145. Vanguard Intl Equity Index Fund FTSE Emerging Market ETF (VWO)	A	Dividend	K	T	Buy	10/03/17	K		
146.					Sold (part)	11/05/17	J		
147. Vanguard Index Fds Small Cap (VBR)	A	Dividend	K	T	Buy	10/03/17	K		
148.					Sold (part)	12/05/17	J		
149.					Sold (part)	12/05/17	J		
150. Wisdomtree Trust Japan Hedge EQT (DXJ)	A	Dividend	J	T	Buy	10/03/17	J		
151.					Buy (add'l)	11/03/17	J		
152.									
153. 3 E Brokerage Account 95 (H)									

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

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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. Fidelity Treasury Money Market Fd (FZFX)	A	Dividend	J	T	Buy	10/03/17	J		
155. iShares Core S&P Total US Stock Market ETF (ITOT)	A	Dividend	J	T	Buy	10/03/17	J		
156. iShares TR MSCI ACWI ETF (ACWI)	A	Dividend	K	T	Buy	10/03/17	K		
157. iShares Inc Core MSCI Emerging Markets ETF (IEMG)	A	Dividend	K	T	Buy	10/03/17	K		
158. iShares TIPS Bond ETF (TIP)	A	Dividend	K	T	Buy	10/03/17	K		
159. iShares Core US Aggregate Bond ETF (AGG)	A	Dividend	J	T	Buy	10/03/17	J		
160. iShares TR Barclays 7 - 10 Yr (IEF)	A	Dividend	K	T	Buy	10/03/17	K		
161. iShares TR Short Treas Bd (SHV)	A	Dividend	K	T	Buy	10/03/17	K		
162. iShares US ETF Tr Short Maturity Bd (NEAR)	A	Dividend	K	T	Buy	10/03/17	K		
163. iShares Gold Trust iShares (IAU)	A	Dividend			Buy	10/03/17	J		
164.					Sold	10/06/17	J	B	
165. Powershares QQQ Tr Unit Ser 1(QQQ)	A	Dividend	J	T	Buy	10/03/17	J		
166. SPDR S&P 500 ETF	A	Dividend	J	T	Buy	10/03/17	J		
167.									
168. 3 E Brokerage Account 00 (H)									
169. Fidelity Treasury Money Market Fd (FZFX)	A	Dividend	J	T	Buy	10/03/17	J		
170. Fidelity Total Bond ETF (FBND)	A	Dividend	J	T	Buy	10/03/17	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 \$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.)

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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)
171. iShares Inc MSCI FRNTR 100 ETF (FM)	A	Dividend	K	T	Buy	10/03/17	J		
172. iShares TR MSCI ACWI ETF (ACWI)	A	Dividend	K	T	Buy	10/03/17	K		
173. iShares Trust MSCI India Index FD (INDA)	A	Dividend	J	T	Buy	10/03/17	J		
174. iShares TIPS Bond ETF (TIP)	A	Dividend	J	T	Buy	10/03/17	J		
175. iShares TR Barclays 7 - 10 Yr (IEF)	A	Dividend	J	T	Buy	10/03/17	J		
176. iShares US ETF Tr Short Maturity Bd (NEAR)	A	Dividend	J	T	Buy	10/03/17	J		
177.					Buy (add'l)	11/05/17	J		
178.					Buy (add'l)	12/05/17	J		
179. iShares Gold Trust iShares (IAU)	A	Dividend	J	T	Buy	10/03/17	J		
180.					Sold (part)	10/05/17	J		
181. Powershares QQQ Tr Unit Ser 1(QQQ)	A	Dividend	J	T	Buy	10/03/17	J		
182.					Buy (add'l)	12/05/17	J		
183. Vanguard Intl Equity Index Fund FTSE Emerging Market ETF	A	Dividend	J	T	Buy	10/03/17	J		
184.					Sold (part)	10/05/17	J		
185.					Sold (part)	11/03/17	J		
186.					Sold (part)	12/05/17	J		
187. Vanguard Index Fds Small Cap (VBR)	A	Dividend	J	T	Buy	10/03/17	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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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. Wisdomtree Trust Japan Hedge EQT (DXJ)	A	Dividend	J	T	Buy	10/03/17	J		
189.					Buy (add'l)	11/03/17	J		
190.					Buy (add'l)	12/05/17	J		
191.									
192. 3 E Brokerage Account 64 (H)									
193. Fidelity Treasury Money Market Fd (FZFX)	A	Dividend	J	T	Buy	10/03/17	J		
194. Fidelity Total Bond ETF (FBND)	A	Dividend	J	T	Buy	10/03/17	J		
195. iShares Inc MSCI FRNTR 100 ETF (FM)	A	Dividend	J	T	Buy	10/03/17	J		
196. iShares Inc MSCI Jpn ETF		None	K	T	Buy	12/05/17	K		
197. iShares TR MSCI ACWI ETF (ACWI)	A	Dividend	K	T	Buy	10/03/17	K		
198. iShares Trust MSCI India Index FD (INDA)	A	Dividend	J	T	Buy	10/03/17	J		
199. iShares TIPS Bond ETF (TIP)	A	Dividend	K	T	Buy	10/03/17	K		
200. iShares TR Barclays 7 - 10 Yr (IEF)	A	Dividend	J	T	Buy	10/03/17	J		
201. iShares Gold Trust iShares (IAU)	A	Dividend	J	T	Buy	10/03/17	J		
202.					Sold (part)	10/06/17	J		
203. iShares US ETF Tr Short Maturity Bd (NEAR)	A	Dividend	K	T	Buy	10/03/17	K		
204.					Buy (add'l)	12/05/17	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 \$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)
205. Powershares QQQ Tr Unit Ser 1(QQQ)	A	Dividend	K	T	Buy	10/03/17	K		
206.					Sold (part)	12/05/17	J	A	
207. SPDR S&P 500 ETF	A	Dividend	J	T	Buy	10/03/17	J		
208. Vanguard Intl Equity Index Fund FTSE Emerging Market ETF	A	Dividend	K	T	Buy	10/03/17	K		
209.					Sold (part)	10/06/17	J		
210.					Sold (part)	11/03/17	J		
211.					Sold (part)	12/05/17	J	A	
212. Vanguard Index Fds Small Cap (VBR)	A	Dividend	K	T	Buy	10/03/17	K		
213. Wisdomtree Trust Japan Hedge EQT (DXJ)	A	Dividend	J	T	Buy	10/03/17	J		
214.					Buy (add'l)	11/03/17	J		
215.									
216. 3 E Brokerage Account 53 (H)									
217. Fidelity Treasury Money Market Fd (FZFX)	A	Dividend	J	T	Buy	10/04/17	J		
218. iShares Core S&P Total US Stock Market ETF (ITOT)	A	Dividend	J	T	Buy	10/04/17	J		
219. iShares TR MSCI ACWI ETF (ACWI)	A	Dividend	J	T	Buy	10/04/17	J		
220. iShares Inc Core MSCI Emerging Markets ETF (IEMG)	A	Dividend	J	T	Buy	10/04/17	J		
221. iShares TIPS Bond ETF (TIP)	A	Dividend	J	T	Buy	10/04/17	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)

222. iShares Core US Aggregate Bond ETF (AGG)	A	Dividend	K	T	Buy	10/04/17	K		
223. iShares TR Barclays 7 - 10 Yr (IEF)	A	Dividend	J	T	Buy	10/04/17	J		
224. iShares TR Short Treas Bd (SHV)	A	Dividend	J	T	Buy	10/04/17	J		
225. iShares US ETF Tr Short Maturity Bd (NEAR)	A	Dividend	J	T	Buy	10/04/17	J		
226. iShares Gold Trust iShares (IAU)	A	Dividend	J	T	Buy	10/04/17	J		
227.									
228. 3 E Brokerage Account 56 (H)									
229. Fidelity Treasury Money Market Fd (FZFX)	A	Dividend	J	T	Buy	10/03/17	J		
230. Fidelity Total Bond ETF (FBND)	A	Dividend	J	T	Buy	10/03/17	J		
231. iShares Inc MSCI FRNTR 100 ETF (FM)	A	Dividend	J	T	Buy	10/03/17	J		
232. iShare Inc MSCI JPN ETF		None	J	T	Buy	12/05/17	J		
233. iShares TR MSCI ACWI ETF (ACWI)	A	Dividend	J	T	Buy	10/03/17	J		
234. iShares TIPS Bond ETF (TIP)	A	Dividend	J	T	Buy	10/03/17	J		
235. iShares TR Barclays 7 - 10 Yr (IEF)	A	Dividend	J	T	Buy	10/03/17	J		
236. iShares US ETF Tr Short Maturity Bd (NEAR)	A	Dividend	J	T	Buy	10/03/17	J		
237.					Buy (add'l)	12/05/17	J		
238. iShares Gold Trust iShares (IAU)	A	Dividend	J	T	Buy	10/03/17	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	
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)
239. Powershares QQQ Tr Unit Ser 1(QQQ)	A	Dividend	J	T	Buy	10/03/17	J		
240.					Sold (part)	12/05/17	J		
241. SPDR S&P 500 ETF	A	Dividend	J	T	Buy	10/03/17	J		
242. Vanguard Intl Equity Index Fund FTSE Emerging Market ETF	A	Dividend	J	T	Buy	10/03/17	J		
243.					Sold (part)	11/03/17	J		
244. Vanguard Index Fds Small Cap (VBR)	A	Dividend	J	T	Buy	10/03/17	J		
245.					Sold (part)	12/05/17	J		
246. Wisdomtree Trust Japan Hedge EQT (DXJ)	A	Dividend	J	T	Buy	10/03/17	J		
247.					Buy (add'l)	11/03/17	J		
248.									
249. CHARLES SCHWAB MONEY MARKET ACCOUNT		None	J	T					
250. Fidelity USA n/k/a Fidelity Money Market Checking Account	A	Interest	K	T					
251. Bank of America (savings)	A	Interest	K	T					
252. Bank of America (checking)	A	Interest	K	T					
253. LILO, LLC (Limited Liability Corporation)	D	Dividend	M	U					
254. Citizens Bank (savings and checkings)	A	Interest	K	T					

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.)*

In 2017, most of the assets owned by my [REDACTED] and me were initially managed by Windhaven Investments ("Windhaven"). In mid-2017, those assets were transferred for management to 3Edge Asset Management ("3Edge"). Windhaven and 3Edge provided the information in this Report concerning the assets each managed. That information is, to the best of my knowledge, correct.

My [REDACTED] and I invest in what Windhaven and 3Edge call "Funds," through which identical investments are made simultaneously for many investors. They are not mutual funds. Rather, various index shares are bought and sold for individual accounts at various times. Therefore, there are many transactions described in this Report which would not be required to be reported if we were invested in mutual funds which engaged in similar transactions.

I have not listed in Part VII the asset in my Relative's Personal Residence Trust in part because I recently learned it was terminated by my relatives several years ago.

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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/ Mark L. Wolf

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
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