

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2012

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) Rushfelt, Gerald L.	2. Court or Organization District of Kansas	3. Date of Report 05/13/2013
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Full Time Magistrate Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2012 to 12/31/2012
7. Chambers or Office Address 628 United States Courthouse 500 State Avenue Kansas City, Kansas 66101		
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.	Co-Trustee	Trust
2.		
3.		
4.		
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.		
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.		
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.				
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.	Membership Dues	American College of Trial Lawyers	\$700.0
2.	Membership Dues	American Board of Trial Advocates	\$500.00
3.	Reduced Membership Dues	International Society of Barristers	\$475.0
4.	Membership Dues	American Bar Association	\$350.0
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.			
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 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. Life Ins. VA, Whole Life,- Philadelphia, PA	A	Int./Div.	K	T					
2. U.S. Savings Bonds	B	Interest	K	T					
3. FIDELITY MANAGEMENT TRUST CO. (IRA - Mutual Funds) - #1	D	Dividend	N	T					
4. - Fidelity Capital & Income (FAGIX)					Sold	03/08/12	J	B	
5. - Pimco Total Return Administrative Shs (PTRAX)					Sold (part)	03/05/12	J	A	
6. - T Rowe Price High Yield Advisor CI (PAHIX)					Sold	03/05/12	J	B	
7. - Pimco Short Term Administrative Shs (PSFAX)									
8. - Fidelity Total Bond (FTBFX)					Sold (part)	03/05/12	J	B	
9. -Strategic Advisers Small-M Cap Fd f/k/a Fidelity (FSCFX)					Sold (part)	03/05/12	J	B	
10. - Fidelity High Income (SPHIX)					Sold	03/05/12	J	B	
11. - Metropolitan West Low Duration M (MWLDX)					Sold	03/05/12	J	B	
12. - Strategic Adv Intl Fund f/k/a Fidelity PAS Intl F (FILFX)					Sold (part)	01/25/12	J	A	
13.					Sold (part)	08/31/12	J		
14.					Sold (part)	11/01/12	J	A	
15. - Credit Suisse Commnd Retrn Strtgy Com Shr (CRSOX)					Sold	01/13/12	J	A	
16. - Strategic Advisers US Oppty Fund f/k/a Fidelity US(FUSOX)					Sold (part)	03/05/12	J	A	
17. - Fidelity Select Gold (FSAGX)									

1. Income Gain Codes:	A = \$1,000 or less (See Columns B1 and D4)	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	F = \$50,001 - \$100,000 (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	Q = Appraisal (See Column C2)	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

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

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)

18. - Templeton Global Bond Class A (TPINX)					Sold (part)	03/08/12	J	A	
19. - Strategic Advisers Value Fund (FVSAX)					Sold (part)	01/13/12	J	A	
20.					Sold (part)	03/05/12	J	A	
21.					Sold (part)	11/01/12	J	A	
22. - Strategic Advisers Core Fund (FCSAX)					Sold (part)	01/13/12	J	A	
23.					Sold (part)	03/05/12	J	A	
24.					Sold (part)	11/01/12	J	A	
25. - Strategic Advisers Growth Fund (FSGFX)					Sold (part)	01/13/12	J	A	
26.					Sold (part)	11/01/12	J	A	
27.					Sold (part)	11/28/12	J	A	
28. - Strategic Advisers Emerging Markets (FSAMX)					Sold (part)	03/05/12	J		
29. - Strategic Advisers Core Income Fund (FPCIX)					Buy (add'l)	01/13/12	J		
30.					Buy (add'l)	01/25/12	J		
31.					Buy (add'l)	03/05/12	K		
32.					Buy (add'l)	03/06/12	J		
33.					Buy (add'l)	08/31/12	J		
34.					Sold (part)	11/01/12	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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☐ 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. - Strategic Advisers Income Opportunities (FPIOX)					Buy (add'l)	03/05/12	J		
36.					Buy (add'l)	03/08/12	J		
37.					Sold (part)	11/15/12	J	A	
38. - FIMM MMKT Inst. C1 (FNSXX)					Buy (add'l)	01/13/12	J		
39.					Buy (add'l)	01/17/12	J		
40.					Sold (part)	01/25/12	J	A	
41.					Buy (add'l)	03/05/12	J		
42.					Buy (add'l)	03/08/12	J		
43.					Buy (add'l)	03/09/12	J		
44.					Buy (add'l)	08/31/12	J		
45. - Merger Fund (MERFX)					Buy (add'l)	03/05/12	J		
46.					Sold (part)	11/28/12	J		
47. - Fidelity Short Term Bond (FSHBX)					Buy	03/05/12	J		
48. - Fidelity GNMA Fund (FGMNX)					Buy	03/05/12	J		
49. - Strategic Advisers Short Duration Fund (FAUDX)					Buy	01/25/12	J		
50.					Buy (add'l)	03/05/12	J		
51.					Buy (add'l)	03/08/12	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.					Buy (add'l)	05/25/12	J		
53.					Buy (add'l)	11/15/12	J		
54. - Arden Alternative Strategies CI 1 Conf (ARDNX)					Buy	11/28/12	J		
55. MERRILL LYNCH IRA ACCOUNT	C	Dividend	L	T					
56. - Beyond Banking - Money Account (Y)									
57. - ML Bank USA RASP - Cash Account (Y)									
58. - American Income Fund of America CI C (IFAFX)									
59. - First Eagle Global Class C (FESGX)									
60. - Ivy Asset Strategy Fund CI C (WASCX)					Sold	11/15/12	J		
61. - Pioneer Strategic Income Fund CI C Shares (PSRCX)					Buy (add'l)	11/23/12	J		
62. BROKERAGE #1 - Merrill Lynch Account									
63. - WYANDOTTE CO/KANSAS CITY KS SPL OBLG Bonds	A	Interest			Redeemed	11/16/12	K		
64. - Franklin Income Fund CI C (FCISX)	D	Dividend	L	T					
65. - Black Rock Global Allocation Fund Inc C (MCLOX)	A	Dividend	L	T					
66. - Wells Fargo Advantage f/k/a Evergreen Precious M. (EKWCX)		None			Sold	11/15/12	K	B	
67. - Ivy Asset Strategy Fund CI C (WASCX)	B	Dividend	L	T					
68. - Nuveen High Yield Muni Bond Fund CI C (NHMCX)	B	Dividend			Sold	11/15/12	K		

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69. - American Capital Income Builder Cl C (CIBCX)	B	Dividend	K	T					
70. - Blackrock National Muni Bond Fund Cl C (MFNLX)	C	Dividend	M	T					
71. - First Eagle Global Cl C (FESGX)	B	Dividend	L	T					
72. - Franklin US Govt Securities Fund Cl C (FRUGX)	C	Dividend	M	T					
73. - Nuveen Kansas Municipal (FCKSX)	A	Dividend	L	T	Buy	11/15/12	K		
74.					Buy (add'l)	11/20/12	K		
75. UMB Bank, n.a., Overland Park, KS - accounts	A	Interest	K	T					
76. American Century IRA	A	Dividend	K	T					
77. - One Choice Portfolio: Moderate (AOMIX)									
78. Trust (Income Beneficiary)	F		N	W					
79. - 160 Acres of farm land in Grant County, KS		Rent							
80. - Linn Operating Co. gas lease, Grant Co, KS (Royalty)		Royalty							
81. - Pioneer Natural Resources, gas lease, Grant County, KS		Royalty							
82. - First National Bank, Overland Park, KS		Interest							
83. Variable Annuity-Ohio National Life Insurance Co.									
84. IRA - Sunlife Assurance Co.									
85. Morgan Stanley Smith Barney Brokerage Account (X)									

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86. - American Century Growth Fund	A	Dividend							
87. - American Century Income & Growth Fund	B	Dividend							
88. - American Century Equity Growth Fund	B	Dividend							
89. IRA - Morgan Stanley & Co.									
90. Metcalf Bank f/k/a 1st Nat'l Bank of Olathe, KS - Accounts	A	Interest	L	T					
91. GPH Family Tree LLC loan - note receivable		None							
92. GPH Family Tree LLC - Part Ownership					Donated				
93. [REDACTED] Trust									
94. 1st Nat'l. Bank of Omaha, f/k/a 1st N.B Overland Park KS	A	Interest	K	T					
95. Chase Home Finance LLC - Mortgagee		None							
96. Quest Securities Litigation - Class Beneficiary		None			Distributed	04/26/12	J		
97. Morgan Stanley Smith Barney Variable Rate Annuity - IRA									
98. Learning Quest 529 Savings Program. Shawnee Msn, KS		None	J	T	Buy	08/15/12	J		
99.					Donated (part)				
100.					Buy (add'l)	11/29/12	J		
101.									
102.									

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
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103.									
104.									
105.									
106.									
107.									

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

Part VIII. Line 80. The gas lease, formerly held by BP Am. Production Co., is now owned by Linn Operating Co.

Part VIII. Lines 83 through 97: All of the assets listed on Lines 83 through 89 and Lines 91, 92, 93, 95, and 97 are the sole financial interest or responsibility of [REDACTED]. They are not derived from the assets, income or activities of the reporting person. The reporting person does not derive or expect to derive a benefit from them; and the reporting person has no knowledge about them, except for the limited information that is stated on these lines. This is to comply with Section 102(e)(1)(E) of the applicable statute. Corresponding lines on the prior report for calendar year 2011 did include information as to income, year-end values, and transactions, all of which related solely to [REDACTED] and was provided by [REDACTED]. For calendar year 2012 the reporting person has not received this information and does not have it; consequently, it is not included in this report. The only exception relates to Lines 86, 87, and 88, on which income is reported, because it was included on joint tax returns; and reporting person therefore has knowledge of it, but does not otherwise have knowledge of whatever transactions or values may be attributable to the assets.

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Rushfelt, Gerald L.

Date of Report

05/13/2013

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/ Gerald L. Rushfelt**

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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