

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2013

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) Edgar, RAllan	2. Court or Organization Western District of Michigan	3. Date of Report 5/5/2014
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) District Judge - Senior	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 1/1/2013 to 12/31/2013
7. Chambers or Office Address U.S. Courthouse 202 W. Washington Street, Ste. 229 Marquette, MI 49855		
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 #1
2.	Trustee	TRUST #2
3.	Director	L.G. Kaufman Foundation
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.		

FINANCIAL DISCLOSURE REPORT

Page 2 of 10

Name of Person Reporting

Edgar, R Allan

Date of Report

5/5/2014

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. 2013	Tennessee Consolidated Retirement System	\$3,986.88
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.				

FINANCIAL DISCLOSURE REPORT

Page 3 of 10

Name of Person Reporting

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5/5/2014

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.

FINANCIAL DISCLOSURE REPORT

Page 4 of 10

Name of Person Reporting

Edgar, Rallan

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5/5/2014

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. FSG Bank-Chattanooga, TN, TRUSTEE SELF-DIRECTED IRA:									
2. - Vanguard Windsor II Fund	B	Dividend	M	T					
3. - Harbor International Fund	C	Dividend	M	T					
4. - T Rowe Price New Era Fund	B	Dividend	M	T					
5. - Harbor Capital App. Fund	A	Dividend	L	T					
6. - Vanguard Mid-Cap Index Fund	A	Dividend	M	T					
7. - CGM Realty Fund	A	Dividend	L	T					
8. - 1 Shares MSCI Pacific Ex Japan Fund	B	Dividend	K	T					
9. - Fidelity Contrafund	A	Dividend	L	T					
10. - Fidelity Fifty Fund	A	Dividend	K	T					
11. - Macquarie Infrastructure Co. Trust	B	Dividend	K	T					
12. I-Shares Brazil Index Fd		None			Sold	08/08/13	J		
13. IBM Corp. 7.62% Bond	B	Interest	K	T					
14. Federated Prime Oblig Money Fund	A	Interest	K	T					
15. Cabot Corp. 5% Bond	B	Interest			Sold	02/28/13	K		
16. FedEx Corp. 8% Bond	B	Interest	K	T					
17. Roche Holding 7% Bond	B	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 \$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	

FINANCIAL DISCLOSURE REPORT

Page 5 of 10

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Edgar, Rallan

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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. Conoco Phillips 5.75% Bond	B	Interest	K	T					
19. U.S. Treasury 3.375% note	B	Interest	L	T					
20. Oakmark Equity Inc. Fund	A	Dividend	L	T					
21. U.S. Treasury 3.125% Note	B	Interest	L	T					
22. U.S. Treasury 4.375% Note	B	Interest	K	T					
23. Alerian MLP Fund	A	Dividend	K	T					
24. I Shares DJ US Regional Banks Fund	A	Dividend			Sold	08/08/13	K		
25. Canadian Gov't Bond 2.00%	A	Interest			Sold	11/21/13			
26. Pimco Unconstrained Bond Fund	A	Interest	K	T	Buy	05/07/13	K		
27. Canadian Govt 2.75% Bond		None	K	T	Buy	11/25/13	K		
28. IRA No. 2									
29. Fidelity Cash Reserves Fund	A	Interest	J	T					
30. Fidelity Contrafund	A	Dividend	J	T					
31. Spartan Total Market Index Fund	A	Dividend	K	T					
32. Fidelity Div. Int'l Fund	A	Dividend	J	T					
33. Fidelity Balanced Fund	A	Dividend	J	T					
34. Fidelity Short Term Bond Fund	A	Dividend	J	T					

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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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FINANCIAL DISCLOSURE REPORT

Page 6 of 10

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Edgar, Rallan

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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				
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35. Fidelity Strategic Inc. Fd	A	Dividend	J	T					
36. Fidelity Dividend Growth Fd	A	Dividend	J	T					
37. Fidelity Strategic Dividend and Income	A	Dividend	J	T					
38. TIAA-CREF Retirement Fund	A	Dividend	L	T					
39. TRUST #1:									
40. - Fidelity Municipal Money Market Fund	A	Dividend	L	T					
41. - Boise Cascade 7.35%	A	Interest	J	T					
42. - U S Treasury 8.125%	A	Interest	J	T					
43. - WalMart 7.55%	B	Interest	K	T					
44. - Spartan Total market Index Fund	C	Dividend	N	T					
45. - Fidelity Div Int'l Fund	A	Dividend	K	T					
46. - Fidelity 500 Index Fund	A	Dividend	K	T					
47. - Fidelity Mega Cap Fd	A	Dividend	K	T					
48. Barclays Bk Del. 2.8% CD	B	Interest			Redeemed	11/04/13			
49. I-Shares- Russell 2000 Index Fd	A	Dividend	K	T					
50. Fidelity High Income Fd	B	Dividend	K	T					
51. 1st Financial Bank S. Dakota CD	A	Interest			Redeemed	03/21/13			

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FINANCIAL DISCLOSURE REPORT

Page 7 of 10

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Edgar, Rallan

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52. Fidelity Total Bond Fund	A	Interest			Sold	12/04/13	J		
53. Fidelity Strategic Dividend & Income Fund	A	Interest	K	T	Buy	1/17/12	K		
54. Sallie Mae BK Salt Lake .75% CD		None	K	T	Buy	12/09/13	K		
55. TRUST #2									
56. - Vanguard Total Stock Market Index Fund	A	Dividend	K	T					
57. - Vanguard Prime Money Market Fund	A	Dividend	J	T					
58. - Vanguard Short Term Bond Index Fund	A	Dividend	J	T					
59. - T Rowe Price New Era Fund	A	Dividend	K	T					
60. - Vanguard Mid-Cap Index Fd	A	Dividend	J	T					
61. - Vanguard Dividend Growth Fd	A	Dividend	J	T					
62. John Hancock Universal Life Insurance	B	Interest	K	T					
63. SunTrust Bank-Accounts	A	Interest	K	T					
64. Peninsula Bank-Account (X)	A	Interest	K	T					
65. Brokerage Account									
66. Nuveen Municipal Value Fund	B	Dividend	L	T	Sold (part)	01/09/13	K	A	
67. I Shares DJ Select Div Index Fd	B	Dividend	K	T	Sold (part)	12/18/13	K	D	
68. I Shares Russell 1000 Growth Index Fund	A	Dividend	L	T	Buy (add'l)	1/24/13	J		

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FINANCIAL DISCLOSURE REPORT

Page 8 of 10

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69. 1 Shares S & P Small Cap 600 Index Fd	A	Dividend	K	T	Buy (add'l)	01/09/13	J		
70. 1 Shares I Boxx High Yield Bond Fd	B	Dividend	J	T	Buy (add'l)	01/09/13	J		
71. 1 SharesMSCI EAFE Growth Index Fund	A	Dividend	K	T	Buy (add'l)	01/24/13	J		
72. 1 Shares S & P Short Term Municipal Bond Fund	A	Dividend	K	T	Buy (add'l)	01/09/13	K		
73. 1 Shares Cohen & Steers Realty Index Fund	A	Dividend	J	T					
74. SPDR S & P Midcap 400 Fund	A	Dividend	K	T	Buy (add'l)	01/24/13	J		
75. SPDR Barclays International Treasury Bond ETF	A	Dividend	J	T	Buy (add'l)	01/24/13	J		
76. Vanguard Large Cap ETF	A	Dividend	K	T					
77. Wisdomtree Emerging Market Fund	A	Dividend	J	T	Buy (add'l)	09/06/13	J		
78. 1 Shares 7-10 Year Treasury Bond ETF	A	Dividend	J	T	Buy (add'l)	01/24/13	J		
79. 1 Shares Natl. Amt Free Muni Bond Fund	A	Dividend	K	T	Buy	01/09/13	K		
80. Powershares Senior Loan Portfolio Fund	A	Dividend	J	T	Buy	09/06/13	J		
81. SPDR S & P 500 Fund		None	K	T	Buy	12/30/13	K		

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FINANCIAL DISCLOSURE REPORT

Page 9 of 10

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

Parts I and VII --

The listed trusts are [redacted] trusts for the benefit of a member of my [redacted].
I am Co-Trustee of TRUST #1, and Trustee of TRUST #2.

FINANCIAL DISCLOSURE REPORT

Page 10 of 10

Name of Person Reporting

Edgar, RAllan

Date of Report

5/5/2014

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/ RAllan Edgar

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