

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) Bloom, Beth F.	2. Court or Organization United States District Court, Southern District of Florida	3. Date of Report 05/15/2018
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) United States District Court Judge, active status	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 United States District Court Southern District of Florida 299 East Broward Boulevard, Room 207 Ft. Lauderdale, FL 33301		
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.)

POSITION

NAME OF ORGANIZATION/ENTITY

1. Secretary	Children's Craniofacial Association, Miami Children's Hospital
2.	
3.	
4.	
5.	

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

☐ NONE (No reportable agreements.)

DATE

PARTIES AND TERMS

1. 01/20/1995	State of Florida, Division of Retirement Pension Plan, payable upon retirement
2.	
3.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 10

Name of Person Reporting

Bloom, Beth F.

Date of Report

05/15/2018

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. 2017	Distribution from The Koniver Stern Group, Inc.
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. Diller Teen Tikkun Olam Awards	August 24, 2017	San Francisco, California	recipient of the Diller Teen Tikkun Olam Award, ceremony	Airline tickets
2.				
3.				
4.				
5.				

FINANCIAL DISCLOSURE REPORT

Page 3 of 10

Name of Person Reporting

Bloom, Beth F.

Date of Report

05/15/2018

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. Iberia Bank	Mortgage, Investment Property #1, Miami Beach, Florida (Part VII, Line 1)	N
2. Bank United	Mortgage, Investment Property #2, Miami Beach, Florida (Part VII, Line 2)	N
3. City National Bank	Mortgage, Investment Property #3, Miami Beach, Florida (Part VII, Line 3)	PI
4. Iberia Bank	Mortgage, Investment Property #4, Miami Beach, Florida (Part VII, Line 4)	M
5. City National Bank	Mortgage, Investment Property #5, Miami Beach, Florida (Part VII, Line 5)	O
6. City National Bank	Mortgage, Investment Property #6, Miami Beach, Florida (Part VII, Line 6)	N
7. Wells Fargo Bank	Mortgage, Investment Property #7 Miami Beach, Florida (Part VII, Line 7)	PI
8. Iberia Bank	Mortgage, Investment Property #8, Miami Beach, Florida (Part VII, Line 8)	M
9. City National Bank	Mortgage, Investment Property #9, Miami Beach, Florida (Part VII, Line 9)	N
10. Mercantile Bank	Mortgage, Miami Beach, LLC (Part VII, Line 10)	PI
11. GBJ + REG	Mortgage, Palm Beach, LLC (Part VII, Line 11)	O
12. City National	Mortgage, Joe Acquisitions (Part VII, Line 13)	O
13. City National	Mortgage, 1201 NW 23 Partners, LLC (Part VII, Line 14)	L

FINANCIAL DISCLOSURE REPORT

Page 4 of 10

Name of Person Reporting

Bloom, Beth F.

Date of Report

05/15/2018

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. Investment Property #1, Miami Beach, Florida	E	Rent	O	W					
2. Investment Property #2, Miami Beach, Florida	D	Rent	O	W					
3. Investment Property #3, Miami Beach, Florida	G	Rent	P2	W					
4.	C	Interest							
5. Investment Property #4, Miami Beach, Florida	E	Rent	N	W					
6. Investment Property #5, Miami Beach, Florida	E	Rent	P1	W					
7. Investment Property #6, Miami Beach, Florida		None	O	W					
8. Investment Property #7, Miami Beach, Florida	E	Rent	O	W					
9. Investment Property #8, Miami Beach, Florida	E	Rent	L	W					
10. Investment Property #9, Miami Beach, Florida	E	Rent	O	W					
11. SRA/Lincoln Theater, LLC, Miami Beach, Florida	E	Rent	P1	W					
12.	A	Interest							
13. NDLS Management, LLC, Palm Beach, Florida		None	P1	W					
14. Joe Acquisitions, LLC, Miami, Florida	E	Rent	P1	W					
15. 1201 NW 23 Partners, LLC, Miami, Florida	B	Rent	N	W					
16. LMNR Axis Properties, LLC		None	J	W					
17. The Stern Organization		None	L	W					

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	

FINANCIAL DISCLOSURE REPORT

Page 5 of 10

Name of Person Reporting

Bloom, Beth F.

Date of Report

05/15/2018

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. 22nd Street Lender, LLC (X)	E	Interest			Closed	12/31/17	O		
19. Joe Partners, LLLP, Miami, Florida (X)	D	Rent	P1	W					
20.	D	Interest							
21. American Funds Europacific Growth Fund	D	Dividend	K	T					
22. Invesco Mid Cap Growth Fund	D	Dividend	K	T					
23. MFS Mass Investors Growth Stock Fund	D	Dividend	L	T					
24. Vanguard Total Stock Market Fund	E	Dividend	M	T					
25. VALIC Fixed Interest Option	B	Interest	L	T					
26. Wells Fargo Adv. Opportunity Fund	A	Dividend	J	T					
27. Citibank, Cash Account	A	Interest	N	T					
28. Citibank, Cash Account	A	Interest	J	T					
29. Citibank, Cash Account	A	Interest	M	T					
30. Gibraltar Bank, Cash Account	A	Interest	L	T					
31. Marquis Bank, Cash Account	A	Interest	J	T					
32. Marquis Bank, Cash Account	A	Interest	J	T					
33. Marquis Bank, Cash Account	A	Interest	K	T					
34. Marquis Bank, Cash Account	A	Interest	M	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	

FINANCIAL DISCLOSURE REPORT

Page 6 of 10

Name of Person Reporting

Bloom, Beth F.

Date of Report

05/15/2018

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)
35. Marquis Bank, Cash Account	A	Interest	M	T					
36. Marquis Bank, Cash Account	A	Interest	K	T					
37. Marquis Bank, Cash Account	A	Interest	N	T					
38. Professional Bank, Cash Account	A	Interest	K	T					
39. Professional Bank, Cash Account	A	Interest	K	T					
40. Professional Bank, Cash Account	A	Interest	K	T					
41. Professional Bank, Cash Account	B	Interest	N	T					
42. Professional Bank, Cash Account	B	Interest	N	T					
43. Professional Bank, Cash Account	B	Interest	J	T					
44. Wells Fargo Bank, Cash Account	A	Interest	J	T					
45. Wells Fargo Bank, Cash Account	A	Interest	N	T					
46. Wells Fargo Bank, Cash Account	A	Interest	M	T					
47. Wells Fargo Bank, Cash Account	A	Interest	K	T					
48. Bank United, Cash Account	A	Interest	J	T					
49. Bank United, Cash Account	B	Interest	M	T					
50. Bank United, Cash Account	B	Interest	N	T					
51. Bank United, Cash Account	B	Interest	M	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 7 of 10

Name of Person Reporting

Bloom, Beth F.

Date of Report

05/15/2018

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)
52. Bank United, Cash Account	B	Interest	M	T					
53. Iberia Bank, Cash Account	A	Interest	O	T					
54. Iberia Bank, Cash Account	A	Interest	M	T					
55. Iberia Bank, Cash Account	A	Interest	M	T					
56. Iberia Bank, Cash Account	A	Interest	P1	T					
57. Iberia Bank, Cash Account	C	Interest	O	T					
58. Iberia Bank, Cash Account	A	Interest	K	T					
59. Iberia Bank, Cash Account	A	Interest	K	T					
60. Iberia Bank, Cash Account	A	Interest	J	T					
61. Iberia Bank, Cash Account	A	Interest	N	T					
62. City National, Cash Account	A	Interest	L	T					
63. BB&T, Cash Account	A	Interest	M	T					
64. Bank of Ozarks, Cash Account	B	Interest	N	T					
65. Bank of Ozarks, Cash Account	A	Interest	N	T					
66. The Bancorp Bank, Cash Account	A	Interest			Closed	09/30/17	N		
67. TD Bank, Cash Account	A	Interest			Closed	07/14/17	M		
68. SEI Institutional Managed Trust Tax- Managed Large Cap Fund Class F	B	Dividend	M	T	Sold (part)	09/25/17	J	B	

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	

FINANCIAL DISCLOSURE REPORT

Page 8 of 10

Name of Person Reporting

Bloom, Beth F.

Date of Report

05/15/2018

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)
69. SEI Institutional Managed Trust Tax-Managed Small/Mid Cap Fd Class F	A	Dividend	K	T					
70. SEI Institutional International Trust International Equity Fd Class F	A	Dividend	L	T					
71. SEI Institutional International Trust Emerging Mkts Equity Fd Class F	A	Dividend	K	T					
72. SEI Tax Exempt Trust Intermediate-Term Municipal Fund Class F	D	Dividend	N	T					
73. SEI Institutional Managed Trust High Yield Bond Fund Class F	C	Dividend	L	T					
74. SEI Institutional International Trust Intl Fixed Income Fund Class F	A	Dividend	L	T					
75. SEI Institutional International Trust Emerging Mkts Debt Fd Class F	B	Dividend	L	T					
76. SEI Institutional Managed Trust Multi-Strategy Alt Fund Class F	B	Dividend	L	T					
77. SEI Daily Income Trust Government Fund Class CAA	B	Dividend	N	T					
78. SEI Daily Income Trust Government Fund Class F	A	Dividend	J	T					
79. SEI Daily Income Trust Government Fund Class CAA	A	Dividend	M	T					
80. SEI Daily Income Trust Government Fund Class	A	Dividend	J	T					
81. SEI Daily Income Trust Government Fund Class	A	Dividend	J	T					
82. Fidelity Govt. MMKT Capital Researves CL (X)	A	Dividend	K	T					
83. CIM COML TR CORP COM (X)	A	Dividend	J	T					
84. Motorola Solutions Inc COM New (X)	A	Dividend	J	T					
85. Investco American Franchise Fund CL A (X)	A	Dividend	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 9 of 10

Name of Person Reporting

Bloom, Beth F.

Date of Report

05/15/2018

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

VI. Liabilities

Lines 1, 4, and 8 changed bank name in 2017 from Sabadell Bank to Iberia Bank.

Line 7 changed banks from Sabadell Bank to Well Fargo Bank.

Line 13 was accidentally omitted from the 2016 report.

VII. Investments and Trusts

Line 11 name fixed from Miami Beach, LLC to SRA/Lincoln Theater, LLC. SRA/Lincoln Theater, LLC is the correct name.

Line 13 name fixed from Palm Beach, LLC to NDLS Management, LLC. NDLS Management, LLC is the correct name.

Lines 18 and 19 were accidentally omitted from the 2016 report.

Lines 53-61 changed bank name in 2017 from Sabadell Bank to Iberia Bank.

Line 82-85 were accidentally omitted from the 2016 report.

FINANCIAL DISCLOSURE REPORT

Page 10 of 10

Name of Person Reporting

Bloom, Beth F.

Date of Report

05/15/2018

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/ **Beth F. Bloom**

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