

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) Colton, Roberta A.	2. Court or Organization U.S. Bankruptcy Court for the Middle District of Florida	3. Date of Report 06/27/2017
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Bankruptcy Judge	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 400 W. Washington St. Rm. 6300 Orlando, Florida 32801		
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. President/Board of Trustees	Hillsborough County Bar Foundation
2. Executive Committee	Trenam Law Firm (Jan 1, 2016 - Mar. 31, 2016)
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. 03/31/2016	Return of Capital from Former Law Firm - Trenam Law and R.A. Colton -\$41,372 payable over two years.
2. 2016	401(k) Plan with Former Law Firm
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	Compensation from former firm - Trenam Law	\$51,250.00
2. 3/31/2016	Return of Capital from former firm - Trenam Law	\$15,000.00
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.	
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. Jacksonville Bar Association	Aug. 25-26, 2016	Jacksonville, Florida	Seminar	Hotel, Dinner and Transportation
2. Florida Bar - Business Law Section	Nov. 1-2, 2016	Miami, Florida	Seminar-View From the Bench	Hotel, Dinner and Transportation
3. National Conference of Bankruptcy Judges	Oct 26-29, 2016	San Francisco	Conference/seminar	Stipend for Expenses
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.)*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 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. Bank of America Accounts	A	Interest	M	T					
2. Ally Bank CD	A	Interest	L	T					
3. Northern Trust Account	A	Interest			Closed	12/09/16	M		
4. Vanguard Retirement Fund 2025	D	Dividend	N	T					
5. Vanguard Admiral Fund	B	Dividend	M	T					
6. Vanguard Ltd. Municipal Fund	A	Dividend	K	T					
7. UBS Money Mkt. Account	A	Interest			Closed	08/16/16	K		
8. Boeing Stock	A	Dividend			Sold	08/16/16	K	E	
9. Nextera Energy Stock	A	Dividend			Sold	08/16/16	K	E	
10. Eaton Vance Nat'l Municipal IncomeFund	A	Dividend			Sold	08/16/16	K	A	
11. IBM Stock	B	Dividend			Sold	08/16/16	K	D	
12. Templeton Global Income Fund	A	Dividend			Sold	08/16/16	J	C	
13. Walt Disney Stock	A	Dividend			Sold	08/16/16	K	E	
14. Comcast Stock	A	Dividend			Sold	08/16/16	J	D	
15. Shwab Money Mkt. Account	A	Interest	O	T					
16. Vanguard Wellsley Fund - IRA	B	Dividend	M	T					
17. Charter Comm.		None			Sold	08/16/16	J	B	

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	
3. Value Method Codes	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
(See Column C2)	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
	U = Book Value	V = Other	W = Estimated		

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18. Morley Stable Value Fund - Trenam 401(k)		None			Sold	08/16/16	M		
19. Metro West tltRtn Bond Fund 1- Trenam 401(k)	B	Dividend			Sold	08/26/16	M		
20. Am. Fds Bal. R5 Fund - Trenam 401(k)	B	Dividend			Sold	08/26/16	M		
21. Amazon Stock		None			Sold	08/16/16	M	G	
22. AT&T Stock	A	Dividend			Sold	08/16/16	J	A	
23. Avis budget Stock		None			Sold	08/16/16	J	A	
24. Charles Schwab Corp. Stock	A	Dividend			Sold	08/16/16	K	A	
25. CSCO	A	Dividend			Sold	08/16/16	J	A	
26. Express Scripts Stock		None			Sold	08/16/16	J	C	
27. Intel Stock	A	Dividend			Sold	08/16/16	J	A	
28. McKesson Stock	A	Dividend			Sold	08/16/16	J	E	
29. Oracle Stock	A	Dividend			Sold	08/16/16	J	D	
30. Pfizer Stock	A	Dividend			Sold	08/16/16	K	D	
31. Time Warner Cable Stock	A	Dividend			Sold	05/20/16	J	A	
32. Time Warner Inc. Stock	A	Dividend			Sold	08/16/16	J	A	
33. Wyndham Workwide Stock	A	Dividend			Sold	08/16/16	J	C	
34. Baron Asset Fund	A	Distribution			Sold	08/16/16	K	D	

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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35. Janus Global Research Fund		None			Sold	08/16/16	K	D	
36. Schwab Core Equity Fund		None			Sold	08/16/16	J	B	
37. Touchstone Focused Fund		None			Sold	08/16/16	J	C	
38. Eaton Vance Total Rate Advantage Fund	A	Dividend			Sold	08/16/16	J	A	
39. T. Rowe Price Rmt. 2020 Fund- Trenam 401(k)		None			Sold	08/26/16	K		
40. Vanguard TI Stk Mkt Indx. Adm Fund - Trenam 401(k)	B	Dividend			Sold	08/26/16	N		
41. Vanguard Sel. Value Inv. Fund - Treann 401(k)		None			Sold	08/26/16	L		
42. Am Fds EuroPacific Grth R6 Fd - Trenam 401(k)		None			Sold	08/26/16	M		
43. Vanguard Variable Annuity- Equity Index	A	Dividend	K	T					
44. Vanguard Variable Annuity - Balanced	A	Dividend	L	T					
45. Vanguard Variable Annuity- Growth	A	Dividend	K	T					
46. Vanguard Variable Annuity-Money Market	A	Dividend	K	T					
47. Vanguard Variable Annuity - Equity Income	A	Dividend	J	T					
48. Fifth Third Bank- HSA	A	Interest	J	T					
49. UBS - IRA - MM	A	Int./Div.			Closed	08/16/16	J		
50. Artisan Intl Value Fund	B	Distribution			Buy	09/22/16	K		
51. Artisan Intl Value Fund	A	Dividend			Buy	08/16/16	L		

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52. Artisan Int'l Value Fund		None			Sold	12/30/16	L	A	
53. Vanguard Total Int'l Stk/VTIAX	A	Dividend			Buy	08/16/16	L		
54. Vanguard Total Int'l Stk/VTIAX		None			Sold	12/30/16	L	A	
55. Vanguard Total Bond/VBTLX	B	Dividend			Buy	08/16/16	M		
56. Vanguard Total Bond/VBTLX	A	Distribution			Sold	12/30/16	M	A	
57. Opp. Dev. Mkt/ODVYX	A	Dividend			Buy	08/18/16	L		
58. Opp. Dev. Mkt/ODVYX		None			Sold	12/30/16	L	A	
59. Harbor International/HAINX		None			Buy	08/18/16	L		
60. Harbor International/HAINX	B	Dividend			Sold	12/31/16	L	A	
61. Vanguard Small Cap Inv/VSMAX	A	Dividend	K	T	Buy	09/22/16	K		
62. Vanguard Short Term inv/VTAPX	A	Dividend	L	T	Buy	08/18/16	L		
63. Vanguard Total Stk. Index	B	Dividend	M	T	Buy	08/18/16	K		
64. Vanguard Total Stk. Index		None			Buy (add'l)	09/20/16	K		
65. Vanguard Total Stk. Index		None			Buy (add'l)	10/18/16	L		
66. Vanguard Total Stk. Index		None			Buy (add'l)	11/21/16	L		
67. Westwood Inc. Oppty Fund	B	Dividend	N	T	Buy	09/06/16	N		
68. Westwood Inc. Oppty Fund	B	Distribution							

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69. Vanguard REIT Index	A	Dividend	K	T	Buy	08/18/16	K		
70. Deutsche Global Infrastructure Inst.		None			Buy	08/18/16	K		
71. Deutsch Global Infrastructure Inst.	A	Dividend	L	T	Buy (add'l)	12/20/16	K		
72. Baird Short Term Bd. Inst.		None	N	T	Buy	12/28/16	N		
73. Eaton Vance Floating Rate Adv. I	A	Dividend	K	T	Buy	08/18/16	K		
74. Oakmark Int'l Sm. Cap Fund	B	Dividend	L	T	Buy	08/18/16	L		
75. Oakmark Int'l Sm. Cap Fund	A	Distribution							
76. Seafarer Overseas Gwth. & Inc. Fund Inst.		None	L	T	Buy	12/30/16	L		
77. Van Eck Global Hard Assets Fund CL 1	A	Dividend	K	T	Buy	08/18/16	K		
78. Van Eck Global Hard Assets Fund CL 1		None			Buy (add'l)	09/20/16	K		
79. Van Eck Global Hard Assets Fund CL 1		None			Buy (add'l)	12/22/16	J		
80. Metro West Total Return Bd. I Fund	B	Dividend	O	T	Buy	09/06/16	N		
81. Metro West Total Return Bd. I Fund		None			Buy (add'l)	12/30/16	M		
82. Templeton Total ReturnAdv.	B	Dividend	N	T	Buy	09/06/16	N		
83. FMI Int'l FB		None	M	T	Buy	12/30/16	M		
84. Loomis Sayles Strat. Inc. Fund	C	Dividend	M	T	Buy	09/06/16	N		
85. Loomis Sayles Strat. Inc. Fund	D	Distribution							

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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86. Vanguard Total St. Index		None			Buy (add'l)	12/20/16	L		
87.									
88.									
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101.									
102.									

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103.									
104.									

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 VII.

Note 1: Liquidation of 401(k) Plan. In August 2016, I liquidated the 401(k) plan that I had with my former law firm for over 30 years. I have been advised that the Plan Administrator for the 401(k) Plan does not account or keep records on contributions and earnings that could be used to calculate gains. I am sure there are significant gains, but the information is not available to calculate them. Accordingly, I have left column D(4) blank for Lines 18-20 and 39-42.

Note 2: Where a fund has multiple Line entries (to indicate additional purchases or sales), I have reflect 2016 earnings for the fund as whole in just one of the Lines. The remaining Lines for that fund reflect "None" in column B(2).

Note 3: Liquidation of Individual Stock Holdings. Also, in August 2016, I also liquidated all of my individual stock holdings. A number of the stocks and funds sold actually were at a loss. In that event, I still used the value "A". Stocks sold with a value of less than \$1,000 are not included in this form.

Responses to Two Inquiries from the Committee on Financial Disclosures, dated May 26, 2017:

INQUIRY: Part VII, listing "CSCO" does not appear on prior (2015) report.

RESPONSE: I misidentified this stock in my 2015 report. "Comcast" is listed twice, first on line 14 and again on line 25 of my amended 2015 report dated July 26, 2016. One of the entries should have been designated "CSCO." The information for both stock is the same.

INQUIRY: Part VII, line 52 "Artisan Int'l Value Fund" does not appear on the prior (2015) report.

RESPONSE: The Artisan Int'l Value Fund shares were purchased during the 2016 reporting period, not during the prior reporting period. The purchases and dates of purchase are reflected on lines 50 and 51 of this report. The shares were sold later in this 2016 reporting period, as reflected on line 52.

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Colton, Roberta A.

Date of Report

06/27/2017

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/ **Roberta A. Colton**

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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Washington, D.C. 20544