

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2014

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) Michelson, Laurie J.	2. Court or Organization United States District Court, Eastern District of Michigan	3. Date of Report 08/03/2015
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) District Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2014 to 12/31/2014
7. Chambers or Office Address 231 West Lafayette Blvd. Room 648 Detroit, MI 48226		
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. Custodian for the Beneficiary (while a minor)	Debra A. Berman Irrevocable Trust
2. Advisory Board Member	Eton Academy
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. 2011	Butzel Long stock redemption with former law firm. \$24,918 payable over five years
2. 2011	Butzel Long Pension Trust. Distributions of \$1,431 per month commencing at the age of 65.
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.)*DATESOURCE AND TYPEINCOME
(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.)*DATESOURCE AND TYPE

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.)*SOURCEDATESLOCATIONPURPOSEITEMS PAID OR PROVIDED

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.)*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 (cash account)	A	Int./Div.	L	T					
2. Bank of America -- IRA (cash)	A	Interest	J	T					
3. Brokerage Account									
4. - Oppenheimer Main Street Fund	A	Int./Div.	K	T					
5. - Bank of America NA RASP	A	Dividend	M	T					
6. - DJIA MITTS ISSUER BAC PART 137%	A	Dividend	K	T	Sold (part)	11/26/14	K	D	
7. - Exxon Mobile Corp Stock	A	Dividend			Sold	11/26/14	K	D	
8. - American Amcap Mutual Fund	A	Dividend	K	T					
9. - American Fundamental Investors Mutual Fund	B	Dividend	M	T	Buy (add'l)	11/28/14	K		
10. - American Inc Fund of America Mutual Fund	B	Dividend			Sold	11/26/14	L	D	
11. - American Washington Mutual Investors Fund	B	Dividend	M	T	Buy (add'l)	11/28/14	K		
12. - Deutsche Floating Rate Mutual Fund (formerly DWS)	D	Dividend	M	T	Sold (part)	12/2/14	K		
13. - First Trust Large Cap Value Mutual Fund	B	Dividend	L	T	Buy (add'l)	12/4/14	K		
14. - First Trust Large Cap Growth Mutual Fund	A	Dividend	L	T	Buy (add'l)	12/4/14	K		
15. - First Trust Mid Cap Core Mutual Fund	A	Dividend	K	T	Buy (add'l)	12/4/14	K		
16. - Gold MITTS Issuer BAC	A	Dividend			Sold	11/26/14	K		
17. - Salient Midstream & MLP Fund	A	Dividend	J	T					

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 J = \$15,000 or less (See Columns C1 and D3)	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes	N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000 (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)

18. - DJIA LIRN Issuer BAC	A	Dividend	J	T					
19. - R2000 ARN Issuer DB Cap	A	Dividend			Sold	11/26/14	J	B	
20. - R2000 ARN Issuer HSBC	A	Dividend	J	T	Buy (add'l)	12/3/14	J		
21. - SP500 Stepup Issuer BAC	A	Dividend	J	T					
22. IRA #1									
23. - Bank of America NA RASP	A	Dividend	J	T					
24. - Blackrock Equity Dividend Mutual Fund	B	Dividend	L	T					
25. - Deutsche Global Infrastructure Fund	A	Dividend	K	T	Buy	12/2/14	K		
26. - Goldman Sachs US Equity Mutual Fund	B	Dividend	K	T					
27. - iShares S&P Global 100 Index Mutual Fund	B	Dividend	L	T					
28. - iShares High Div Equity Fund	B	Dividend	L	T					
29. - Pimco Global Multi Asset Fund	A	Dividend			Sold	11/28/14	L		
30. - Lord Abbett Multi Asset Growth Fund	B	Dividend	K	T	Buy	12/2/14	L		
31. - Powershares S&P 500 High Fund	B	Dividend	L	T					
32. - Vanguard Dividend Appreciation Fund	B	Dividend	L	T					
33. - Wisdomtree Emerging Market Equity Fund	A	Dividend			Sold	12/02/14	K		
34. Simons-Michelson-Zieve Inc Stock	A	Dividend	M	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 = \$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. The Northwestern Mutual Life Insurance Company (whole life)	C	Interest	L	T					
36. Massachusetts Mutual Life Ins Company (group universal)	B	Interest	J	T					
37. Simons-Michelson-Zieve Note Receivable	D	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
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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.)*

Part I: The Debra Berman Irrevocable Trust presently is an unfunded trust holding life policy through USAA.

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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/ Laurie J. Michelson**

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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