

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2015

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) Burris, Helen E.	2. Court or Organization US Bankruptcy Court, DSC	3. Date of Report 05/09/2016
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) US Bankruptcy Judge- Full time	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2015 to 12/31/2015
7. Chambers or Office Address Federal Courthouse 201 Magnolia Street Spartanburg, SC 29306		
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, #3	See Part VII
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.		

FINANCIAL DISCLOSURE REPORT

Page 2 of 9

Name of Person Reporting

Burris, Helen E.

Date of Report

05/09/2016

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.)*

DATE	SOURCE AND TYPE	INCOME (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.)*

DATE	SOURCE AND TYPE
1. 2015	Employment with Turner Padgett Graham & Laney
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.)*

SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1. South Carolina Bar	01/23/2015 to 01/25/2015	Columbia, SC	CLE/Bar meeting	registration waived
2. National Association of Bankruptcy Trustees	02/26/2015 to 02/28/2015	Charleston, SC	CLE/speaker	travel, lodging, food and expenses
3. National Conference of Bankruptcy Judges	04/12/2015 to 04/14/2015	San Antonio, TX	mid year board meeting	travel, lodging, food and expenses
4. South Carolina Bankruptcy Law Association	05/08/2015 to 05/09/2015	Savannah, GA	CLE/ speaker	lodging, food, registration waived
5. National Conference of Bankruptcy Judges	09/06/2015 to 09/30/2015	Miami, FL	CLE/annual board meeting	travel, lodging, food and expenses

FINANCIAL DISCLOSURE REPORT

Page 3 of 9

Name of Person Reporting Burris, Helen E.	Date of Report 05/09/2016
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6.	South Carolina Defense Trial Attorneys Assn.	11/05/2015 to 11/08/2015	Amelia Island, FL	CLE	lodging, food, registration waived
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FINANCIAL DISCLOSURE REPORT

Page 4 of 9

Name of Person Reporting

Burris, Helen E.

Date of Report

05/09/2016

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.	Turner Padgett Graham & Laney 401K plan (loan from Fidelity Freedom 2030 Fund listed on VII)	loan from employer investment account to filer spouse	J
2.			
3.			
4.			
5.			

FINANCIAL DISCLOSURE REPORT

Page 5 of 9

Name of Person Reporting

Burris, Helen E.

Date of Report

05/09/2016

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. South State Bank - Accounts	A	Interest	K	T					
2. Tr. #1 South State Bank	A	Interest	J	T					
3. Tr. #2 Russell Frank Inv. Co. Lifepoints Fund Conserv.	A	Int./Div.	J	T					
4. Russell Frank Inv. Co. Lifepoints Fund Growth Strategy Relax	A	Int./Div.			Sold	11/03/15	M		See Part VIII
5. Voya Financial, Inc. Annuity (ING USA)	A	Int./Div.	M	T					
6. NW Mutual Whole Life Cash Value #1	D	Dividend	L	T					
7. "Y" #2 Putnam Investments New Opportunities Fund Class A & B		None							see Part VIII
8. 401K Fidelity Freedom 2030 Fund	D	Int./Div.	N	T					
9. NetReit Real Estate Investment Trust	A	Dividend	K	T					
10. (H)- IRA American Funds									
11. -American Funds-Income Fund of America A	A	Dividend	J	T					
12. -American Funds-American Balanced Fund A	A	Dividend	J	T					
13. Future Scholar 529 College Savings Plan-FS Mod Conserv (no control)	A	Int./Div.	J	T	Distributed (part)	03/03/15	J		
14. -cont'd					Buy (add'l)	11/17/15	J		
15. -cont'd					Distributed (part)	12/02/15	J		
16. Monogram Residential Trust (formerly Behringer Harvard Multifamily)	A	Dividend	K	T					
17. Rental Property #1 Greenville SC	D	Rent	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 = \$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 9

Name of Person Reporting

Burris, Helen E.

Date of Report

05/09/2016

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18. Trust #3 Invesco Bal Risk Alloc C	A	Int./Div.	J	T					
19. Future Scholar 529 College Savings Plan (2nd acct) -FS Mod Conserv (2)	A	Int./Div.	J	T	Distributed (part)	07/29/15	J		
20. -cont'd					Buy (add'l)	11/17/15	J		
21. -cont'd					Buy (add'l)	12/01/15	J		
22. Russell LifePoints Growth Strategy A (RALAX)	A	Int./Div.			Sold	11/03/15	K		see Part VIII
23. (H) TD Ameritrade Institutional									
24. -Deutsche X-Trackers MSCI Europe Hedged Equity ETF	A	Int./Div.	K	T	Buy	11/03/15	J		
25. -cont'd					Buy (add'l)	12/14/15	J		
26. -First TR Exchan Traded FD VII FST TR GLB FD	A	Int./Div.	J	T	Buy	11/03/15	J		
27. -Ishares Core S&P Mid-Cap ETF	A	Int./Div.	K	T	Buy	11/03/15	K		
28. -cont'd					Sold (part)	12/14/15	J		
29. -Ishares Core S&P Small-Cap ETF	A	Int./Div.	J	T	Buy	11/03/15	K		
30. -cont'd					Sold (part)	12/14/15	J		
31. -Ishares Floating Rate Bond ETF	A	Int./Div.	J	T	Buy	11/03/15	J		
32. -cont'd					Sold (part)	12/15/15	J		
33. -Powershares Global Listed	A	Int./Div.	J	T	Buy	11/03/15	J		
34. -cont'd					Sold (part)	12/15/15	J		

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FINANCIAL DISCLOSURE REPORT

Page 7 of 9

Name of Person Reporting

Burris, Helen E.

Date of Report

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35. -Powershares Var Rate PFD POR ETF	A	Int./Div.	J	T	Buy	11/03/15	J		
36. -Vanguard FTSE Developed Markets ETF	A	Int./Div.	K	T	Buy	11/03/15	K		
37. -cont'd					Buy (add'l)	12/14/15	J		
38. -Vanguard Emerging Markets ETF	A	Int./Div.	J	T	Buy	11/03/15	K		
39. -cont'd					Sold (part)	12/14/15	J		
40. -Vanguard Index Funds S&P 500 ETF	A	Int./Div.	K	T	Buy	11/03/15	K		
41. -cont'd					Sold (part)	12/15/15	J		
42. -SPDR Series Trust Short Term High Yield Bond ETF	A	Int./Div.	J	T	Buy	12/14/15	J		
43.									
44.									
45.									

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FINANCIAL DISCLOSURE REPORT

Page 8 of 9

Name of Person Reporting	Date of Report
Burris, Helen E.	05/09/2016

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

VII. Line 4 and 22- reinvested in TD Ameritrade International Account Line 23 - 42.

VII. Line 5- ING USA, Inc. changed its name to Voya Financial, Inc. in April of 2014.

VII. Line 7-This fund was established by grandparents of reporter's child (now 18). Previously they advised that the account was in the name of reporter's child and the fund was included herein. Upon inquiry in April 2016 to prepare this report grandparents advised that the fund was exhausted by college expense contributions and it was never in any particular grandchild's name. It will be removed from the next report.

FINANCIAL DISCLOSURE REPORT

Page 9 of 9

Name of Person Reporting

Burris, Helen E.

Date of Report

05/09/2016

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/ **Helen E. Burris**

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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