

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) Freeman, Beth L.	2. Court or Organization U.S. District Court, Northern District of California	3. Date of Report 08/21/2016
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Judge - Active Status	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 U. S. District Court 280 South First St. San Jose, CA 95113		
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.	Member, Board of Governors	Association of Business Trial Lawyers
2.	Director	Junior Statesmen Foundation
3.	Co-Trustee	██████ Family Trust
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.	1983	San Mateo County Employees Retirement Association - Pension
2.		
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. 2015	San Mateo County Employees' Retirement Association - Pension	\$77,108.13
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. 2015	Self-employed: Attorney
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.				

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V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*

☒ NONE *(No reportable gifts.)*

SOURCE	DESCRIPTION	VALUE
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.)*

CREDITOR	DESCRIPTION	VALUE 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. ██████████ Aggregate (H)									
2. - DFA US Core Equity I Institutional	A	Dividend	K	T					
3. - SPDR S&P 500 ETF	C	Dividend	M	T					
4. - Schwab Total Stock Market Index Fund	A	Dividend	K	T					
5. - Vanguard Dividend Appreciation ETF	B	Dividend	L	T					
6. - Vanguard Growth Index Fund Investor Shares	A	Dividend	K	T					
7. - Vanguard Total Stock Market ETF	D	Dividend	M	T	Sold (part)	06/26/15	K	D	
8. - BMO Small-Cap Growth Fund	A	Dividend	J	T	Sold (part)	03/13/15	K		
9. - John Hancock Disciplined Value Mid Cap Fund	C	Dividend	L	T					
10. - Touchstone Small Cap Core Fund	D	Dividend	K	T					
11. - Voya MidCap Opportunities Fund	C	Dividend	L	T					
12. - Artisan International Fund	A	Dividend	M	T	Buy (add'l)	01/30/15	K		
13.					Buy (add'l)	03/16/15	K		
14.					Buy (add'l)	11/19/15	J		
15. - Dodge & Cox International Stock Fund	C	Dividend	M	T	Buy (add'l)	01/30/15	K		
16.					Buy (add'l)	03/16/15	K		
17.					Buy (add'l)	12/21/15	J		

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 ~\$250,000,001 - \$500,000,000	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	

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18. - Oakmark International Small Cap Fund	D	Dividend	M	T	Buy (add'l)	01/30/15	K		
19.					Buy (add'l)	12/17/15	J		
20. - Vanguard FTSE All World ex-US ETF	A	Dividend	J	T					
21. - Vanguard FTSE Developed Markets ETF	B	Dividend	L	T					
22. - iShares MSCI Pacific ex-Japan ETF	B	Dividend	K	T					
23. - Ashmore Emerging Markets Frontier Equity Fund	A	Dividend	M	T	Buy	08/06/15	M		
24. - Wasatch Frontier Emerging Small Countries Fund	A	Dividend	M	T					
25. - Angel Oak Flexible Income Fund	E	Dividend	O	T	Buy	01/30/15	J		
26.					Buy (add'l)	02/03/15	N		
27.					Buy (add'l)	02/18/15	N		
28.					Buy (add'l)	04/02/15	L		
29.					Sold (part)	11/25/15	J		
30. - Stone Ridge All Asset Variance Risk Premium Fund	D	Dividend	O	T	Buy	04/09/15	O		
31.					Buy (add'l)	12/10/15	J		
32. - FPA Crescent Fund	B	Dividend	K	T					
33. - Schooner Hedged Alternative Income Fund	D	Dividend	O	T	Buy	12/14/15	O		
34.					Buy (add'l)	12/28/15	J		

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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 \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
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35. - Stone Ridge Reinsurance Risk Premium Fund	E	Dividend	N	T	Buy (add'l)	12/10/15	K		
36. - RiverPark Short Term High Yield Fund	E	Dividend	O	T					
37. - DoubleLine Total Return Bond Fund	E	Dividend	O	T	Sold (part)	11/25/15	J		
38. - Angel Oak Multi-Strategy Income Fund	E	Dividend	O	T					
39. - Legg Mason Brandywine Alternative Credit Fund	E	Dividend	O	T	Sold (part)	04/15/15	J		
40. - Palmer Square Income Plus Fund	E	Dividend	N	T					
41. - Schwab AMT Tax-Free Money Market Fund		None	J	T					
42. - Schwab U.S. Treasury Money Market Fund		None	L	T					
43. - AT&T Inc New Common Stock	A	Dividend	K	T	Spinoff (from line 93)	07/27/15	K		
44. - AbbVie Inc Common Stock	B	Dividend	K	T					
45. - Abbott Laboratories Common Stock	A	Dividend	K	T					
46. - American International Group Common Stock	A	Dividend	K	T					
47. - Apple Inc Common Stock	D	Dividend	N	T					
48. - Berkshire Hathaway Class B Common Stock		None	J	T					
49. - CVS Corporation Common Stock	C	Dividend	M	T					
50. - Coca Cola Co. Common Stock	C	Dividend	L	T					
51. - Colgate-Palmolive Co. Common Stock	A	Dividend	K	T					

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52. - Comcast Corp. New Common Stock	C	Dividend	M	T					
53. - International Business Machines Common Stock	A	Dividend	J	T					
54. - Marathon Petroleum Corp Common Stock	A	Dividend	K	T					
55. - MasterCard Inc Common Stock	A	Dividend	K	T					
56. - McDonald Corp Common Stock	B	Dividend	K	T					
57. - Microsoft Corp Common Stock	D	Dividend	N	T					
58. - Pepsico, Inc Common Stock	D	Dividend	M	T					
59. - Proctor & Gamble Co Common Stock	C	Dividend	M	T					
60. - Rite Aid Corp Common Stock		None	J	T					
61. - Sonic Corp Common Stock	A	Dividend	K	T					
62. - Spectrum Brands Holdings Inc Common Stock	A	Dividend	J	T					
63. - TJX Companies Inc Common Stock	A	Dividend	K	T					
64. - Target Corporation Common Stock	A	Dividend	J	T					
65. - Visa, Inc Common Stock	A	Dividend	M	T					
66. - Wal-Mart Stores Inc Common Stock	A	Dividend	K	T					
67. - Walgreens Boots Alliance Inc Common Stock	A	Dividend	K	T					
68. - Amgen Inc Common Stock	A	Dividend	J	T					

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69. - Chipotle Mexican Grill, Inc Common Stock		None	J	T					
70. - Schwab Value Advantage Fund	A	Dividend	L	T	Sold (part)	01/30/15	L		
71.					Sold (part)	03/31/15	J		
72.					Sold (part)	12/22/15	K		
73. - UBS Alerian MLP Infrastructure ETN	C	Dividend			Buy (add'l)	01/23/15	J		
74.					Sold	04/01/15	M		
75. - Center Coast MLP Focus Fund	D	Dividend			Buy (add'l)	01/14/15	K		
76.					Buy (add'l)	01/28/15	J		
77.					Buy (add'l)	02/10/15	J		
78.					Buy (add'l)	02/25/15	J		
79.					Buy (add'l)	03/27/15	J		
80.					Sold	04/01/15	N		
81. - American Beacon Global Evolution Frontier Markets Income Fund	E	Dividend			Buy (add'l)	01/16/15	J		
82.					Buy (add'l)	04/02/15	K		
83.					Sold	12/11/15	O		
84. - Marathon Oil Corp Common Stock	A	Dividend			Sold	12/30/15	J		
85. - FSC Retreat at Conroe, Conroe, TX (2014 \$75,000)	D	Rent	L	R					

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86. - FSC Estates at Canyon Ridge, San Antonio, TX (2014 \$75,000)	D	Rent	L	R					
87. - FSC Vista Sureno, Phoenix, AZ (2015 \$75,000)		None	L	R	Buy	11/16/15	L		
88. - FSC Granada Hills, Los Angeles, CA (2015 \$75,000)		None	L	R	Buy	12/04/15	L		
89. - Verisign Inc Common Stock		None			Donated				
90. - Intuitive Surgical Inc Common Stock		None			Donated				
91. - Nvidia Corp Common Stock	A	Dividend			Donated				
92. - Texas Instruments Common Stock	A	Dividend			Donated				
93. - DirectTV Common Stock		None			Sold	07/27/15	J		
94. - Mainstay Marketfield Fund		None			Sold (part)	02/02/15	M		
95.					Sold (part)	02/17/15	M		
96.					Sold	04/01/15	M		
97. - Aston/River Road Independent Value Fund		None			Sold (part)	02/02/15	M		
98.					Sold	02/17/15	M		
99. - Wasatch Emerging Markets Small Cap Fund		None			Sold	08/05/15	M	A	
100. Charitable Gift Account (H)									
101. - Verisign Inc Common Stock		None			Buy	09/10/15	K		
102.					Sold	09/11/15	K		

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103. - Intuitive Surgical Inc Common Stock		None			Buy	09/10/15	K		
104.					Sold	09/11/15	K		
105. - Nvidia Corp Common Stock		None			Buy	09/10/15	K		
106.					Sold	09/11/15	K		
107. - Texas Instruments Common Stock		None			Buy	09/10/15	J		
108.					Sold	09/11/15	J		
109. - Schwab Charitable Equity Index Pool		None	J	T	Buy	09/15/15	J		
110. - Schwab Charitable Income Pool		None	K	T	Buy	09/15/15	K		
111. - Schwab Charitable International Pool		None	J	T	Buy	09/15/15	J		
112. - Schwab Charitable Money Market Pool		None	K	T	Buy	09/15/15	K		
113. - Schwab Charitable Short Term Income Pool		None	K	T	Buy	09/15/15	K		
114. - New Heights Associates LLC (inherited)		None	M	W					
115. Jones Day Capital Account	D	Int./Div.	N	U					
116. Jones Day 2015 Fund	B	Int./Div.	N	T	Buy (add'l)	10/26/15	K		
117.					Buy (add'l)	11/16/15	K		
118.					Buy (add'l)	12/16/15	K		

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

This year, rather than listing each account under its separate header, this report lists holdings and positions in the aggregate. The below headers from 2014 have now been aggregated under the new header "[REDACTED] Aggregate (H)":

1. Trust #1 (H), including subheaders brokerage #1 (H), brokerage #2 (H), brokerage #3 (H)
2. Trust #2 (H)
3. Trust #3 (H), including subheader brokerage #6 (H)
4. Trust #4 (H), including subheader brokerage #7 (H)
5. IRA #1 (H)
6. IRA #2 (H)
7. IRA #3 (H)

Line 42 on Report dated 5/8/2016 ("Schwab Government Money Market Fund") should not have been included because per Section VII(A) of the filing instructions, this security did not meet either the income (\$200 or more) or value (greater than \$1,000) thresholds that require it to be a reported asset. This line has now been deleted and as a result, the numbering of all subsequent lines has changed.

Line 43 (previously reported in the 5/8/2016 Report as Line 44): AT&T Common Stock Shares were obtained via DirectTV-AT&T Merger on 07/27/15

Line 52 (previously reported in the 5/8/2016 Report as Line 53): On 12/14/15, there was a reorganization where 1 share of Comcast Corp New was received for every 1 share of Comcast Corp.

Lines 89-92 (previously reported in the 5/8/2016 Report as Lines 89-93): These stocks were donated to "Charitable Gift Account (H)", see below

Line 93(D)(4) (previously reported in the 5/8/2016 Report as Line 94(D)(4)): Represents the cash received via the DirectTV-AT&T Merger on 07/27/15

Line 100 (previously reported in the 5/8/2016 Report as Line 101): A new header titled "Charitable Gift Account (H)" has been established for a donor advised fund, where [REDACTED] are donors. They have control over the investment and gifting of the assets but are not the asset beneficiaries. Donations made into this account are automatically liquidated and invested into Schwab Charitable's investment pools.

Lines 89, 90, 93, 94, 97, 99, 101, 104, 106 and 108 (previously reported in the 5/8/2016 Report as Lines 90, 91, 94, 95, 98, 100, 102, 104, 106 and 108) have been amended to show "None" as the type of income in Column B(2).

Lines 115-18 have been added in the Amended Report to show assets inadvertently omitted from the Report dated 5/8/2016.

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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/ **Beth L. Freeman**

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
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