

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) Johnson, Kimberly C. Priest	2. Court or Organization U.S District Court for the Eastern District of Texas	3. Date of Report 05/15/2018
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Magistrate Judge (FT)	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 Federal Courthouse 7940 Preston Road Plano, TX 75024		
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. Adjunct Faculty	
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.	
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. 2017		\$2,000.00
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	Fish & Richardson P.C. (salary)
2. 2017	Self-employed (attorney)
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. EDTX Bar Association	March 9, 2017	Plano, TX	EDTX Criminal Bench Bar Dinner	Meal
2. San Francisco Daily Journal	April 16-19, 2017	San Francisco, CA	Patent Conference (speaker)	Transportation, lodging, meals
3. EDTX Bar Association	May 8, 2017	Plano, TX	EDTX Bar Association Dinner	Meal
4. Texas Bar Association	July 20-21, 2017	Horseshoe Bay, TX	Patent Conference (speaker)	Transportation, lodging, meals
5. EDTX Bar Association	October 4-6, 2017	Plano, TX	EDTX Annual Bench Bar Dinner	Transportation, lodging, meals

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6.	Texas Bar Association	November 1, 2017	Horseshoe Bay, TX	Luncheon	Meal
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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.	Fish & Richardson, P.C. 401(k)	personal loan	None
2.	FACTS Management Co.	tuition loan	J
3.	American Bank of Texas, First United Bank	personal loan	None
4.	Northwestern Mutual Life	insurance loan	M
5.	Wells Fargo	line of credit	N
6.	First United Bank	line of credit	M
7.	Citibank	credit card	J

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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. CHASE BANK (VARIOUS ACCOUNTS)	A	Interest	K	T					
2. BBVA COMPASS (VARIOUS ACCOUNTS)	A	Interest	K	T					
3. RENTAL PROPERTY, TIGERTOWN, TX (1/5 INTEREST)	A	Rent	K	W					
4. FISH & RICHARDSON, P.C. (CASH BALANCE)	A	Interest			Closed	02/08/17	N		
5. 401(K) #1 (H)									
6. WELLS FARGO STABLE VALUE	A	Interest			Sold	02/08/17	J	A	
7. TCW TOTAL RETURN BOND I	A	Dividend			Sold	02/08/17	J	A	
8. CALAMOS GROWTH & INCOME I	A	Dividend			Sold	02/08/17	J	A	
9. DODGE & COX STOCK	A	Dividend			Sold	02/08/17	J	A	
10. MAINSTAY LARGE CAP GROWTH I	A	Dividend			Sold	02/08/17	J	A	
11. JPMORGAN MID CAP VALUE INSTL	A	Dividend			Sold	02/08/17	J	A	
12. ARTISAN MID CAP INSTL	A	Dividend			Sold	02/08/17	J	A	
13. BROWN CAPITAL MGMT SMALL CO INSTL	B	Dividend			Sold	02/08/17	J	A	
14. ALLIANZ NFJ SMALL CAP VALUE INSTL	A	Dividend			Sold	02/08/17	J	A	
15. HARBOR INTERNATIONAL INSTITUTIONAL	A	Dividend			Sold	02/08/17	J	A	
16. ARTISAN INTERNATIONAL INSTL		None			Sold	02/08/17	J	A	
17. 401K #2 (H)									

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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☐ 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. WELLS FARGO STABLE VALUE	A	Interest			Sold	04/12/17	J		
19. VANGUARD INFLATION-PROTECTED SECS	A	Dividend			Sold	04/12/17	J		
20. VANGUARD TOTAL BOND MARKET INDEX ADMIRAL	B	Dividend			Sold	04/12/17	J		
21. VANGUARD INSTITUTIONAL INDEX I	A	Dividend			Sold	04/12/17	K		
22. VANGUARD MID CAP INDEX ADMIRAL	A	Dividend			Sold	04/12/17	K		
23. VANGUARD SMALL CAP INDEX ADMIRAL	A	Dividend			Sold	04/12/17	J		
24. VANGUARD TOTAL INTL STOCK INDEX ADMIRAL	A	Dividend			Sold	04/12/17	J		
25. IRA #1 (H)									
26. RAYMOND JAMES BANK DEPOSIT PROGRAM (Y)									
27. AMG SOUTHERNSUN U.S. EQUITY FUND CLASS I N/L (SSEIX)	A	Dividend	K	T	Buy (add'l)	02/13/17	J		
28.					Sold (part)	11/16/17	J		
29. BROWN ADVISORY GROWTH EQUITY FUND INVESTOR SHARES N/L (BIAGX)	A	Dividend	K	T	Buy (add'l)	02/09/17	J		
30. EUROPACIFIC GROWTH FUND CLASS F2 - AMERICAN FUNDS N/L (AEFFX)	A	Dividend	L	T	Buy (add'l)	02/13/17	J		
31. JOHN HANCOCK DISCIPLINED VALUE FUND CLASS I N/L (JVLIX)	A	Dividend	K	T	Buy (add'l)	02/13/17	J		
32. JPMORGAN VALUE ADVANTAGE FUND INSTITUTIONAL CLASS N/L (JVAIX)	A	Dividend	K	T	Buy (add'l)	02/09/17	J		
33. LAZARD EMERGING MARKETS EQUITY PORT INSTITUTIONAL SHS N/L (LZEMX)	A	Dividend	K	T	Buy (add'l)	02/09/17	J		

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34. CLEARBRIDGE AGGRESSIVE GROWTH FUND CLASS I N/L (SAGYX)	A	Dividend	K	T	Buy (add'l)	02/09/17	J		
35. METROPOLITAN WEST TOTAL RETURN BOND FUND CLASS I N/L (MWTIX)	A	Dividend	K	T	Buy (add'l)	02/13/17	J		
36. VICTORY INTEGRITY SMALL CAP VALUE FUND CLASS Y N/L (VSVIX)	A	Dividend	K	T	Buy (add'l)	02/09/17	J		
37.					Sold (part)	11/15/17	J		
38. ISHARES TR CORE US AGGBD ET (AGG)	A	Dividend	K	T	Buy (add'l)	02/13/17	J		
39. ISHARES TR MIN VOL UDA ETF (USMV)	A	Dividend	J	T	Buy	11/16/17	J		
40. ISHARES TR CORE MSCI EAFE (IEFA)	A	Dividend	K	T	Buy (add'l)	02/13/17	J		
41. VANGUARD INDEX FUNDS S&P 500 ETF SHS NEW (VOO)	A	Dividend	L	T	Buy (add'l)	02/13/17	J		
42.					Sold (part)	11/16/17	J		
43. IRA #2 (H)									
44. RAYMOND JAMES BANK DEPOSIT PROGRAM	A	Interest	K	T	Open	04/13/17	M		
45. AMG SOUTHERNSUN U.S. EQUITY FUND CLASS I N/L (SSEIX)	A	Dividend	L	T	Buy	04/20/17	J		
46.					Buy (add'l)	06/15/17	K		
47.					Sold (part)	11/16/17	K		
48. BROWN ADVISORY GROWTH EQUITY FUND INVESTOR SHARES N/L (BIAGX)	D	Dividend	L	T	Buy	04/18/17	J		
49. EUROPACIFIC GROWTH FUND CLASS F2 - AMERICAN FUNDS N/L (AEPFX)	D	Dividend	M	T	Buy	04/20/17	J		

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50.					Buy (add'l)	06/15/17	K		
51. JOHN HANCOCK DISCIPLINED VALUE FUND CLASS I N/L (JVLIX)	C	Dividend	L	T	Buy	04/20/17	J		
52.					Buy (add'l)	06/15/17	K		
53. JPMORGAN VALUE ADVANTAGE FUND INSTITUTIONAL CLASS N/L (JVAIX)	B	Dividend	L	T	Buy	04/18/17	J		
54. LAZARD EMERGING MARKETS EQUITY PORT INSTITUTIONAL SHS N/ L (LZEMX)	A	Dividend	K	T	Buy	04/18/17	J		
55.					Buy (add'l)	06/15/17	J		
56. CLEARBRIDGE AGGRESSIVE GROWTH FUND CLASS I N/L (SAGYX)	C	Dividend	L	T	Buy	04/18/17	J		
57. METROPOLITAN WEST TOTAL RETURN BOND FUND CLASS I N/L (MWTIX)	B	Dividend	M	T	Buy	02/20/17	J		
58.					Buy (add'l)	06/15/17	K		
59. VICTORY INTEGRITY SMALL CAP VALUE FUND CLASS Y N/L (VSVIX)	C	Dividend	L	T	Buy	04/18/17	J		
60.					Buy (add'l)	06/13/17	K		
61.					Sold (part)	11/15/17	K		
62. ISHARES TR CORE US AGGBD ET (AGG)	B	Dividend	L	T	Buy	04/20/17	J		
63.					Buy (add'l)	06/15/17	K		
64. ISHARES TR MIN VOL UDA ETF (USMV)	A	Dividend	K	T	Buy	11/16/17	K		
65. ISHARES TR CORE MSCI EAFE (IEFA)	B	Dividend	L	T	Buy	04/20/17	J		

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66.					Buy (add'l)	06/15/17	K		
67.					Buy (add'l)	11/15/17	K		
68.	VANGUARD INDEX FUNDS S&P 500 ETF SHS NEW (VOO)	B	Dividend	M	T	Buy	04/20/17	K	
69.					Buy (add'l)	06/15/17	L		
70.					Sold (part)	11/16/17	K		
71.	BROKERAGE ACCOUNT #1 (H)								
72.	AMERICAN MUTUAL FUND CLASS F2 - AMERICAN FUNDS N/L (AMRFX)	A	Dividend	J	T	Buy	10/24/17	J	
73.	DODGE & COX INCOME FUND N/L (DODIX)	A	Dividend	J	T	Buy	10/23/17	J	
74.	EUROPACIFIC GROWTH FUND CLASS F2 - AMERICAN FUNDS N/L (AEPFX)	A	Dividend	J	T	Buy	10/24/17	J	
75.	JPMORGAN VALUE ADVANTAGE FUND CLASS L N/L (JVAIX)	A	Dividend	J	T	Buy	10/23/17	J	
76.	CLEARBRIDGE AGGRESSIVE GROWTH FUND CLASS I N/L (SAGYX)	A	Dividend	J	T	Buy	10/23/17	J	
77.	LOOMIS SAYLES GROWTH FUND CLASS Y N/L - NATIXIS ADVISOR (LSGRX)	A	Dividend	J	T	Buy	10/23/17	J	
78.	METROPOLITAN WEST TOTAL RETURN BOND FUND CLASS I N/L (MWTIX)	A	Dividend	J	T	Buy	10/24/17	J	
79.	PRUDENTIAL HIGH YIELD FUND CLASS Z N/L (PHYZX)	A	Dividend	J	T	Buy	10/23/17	J	
80.	T. ROWE PRICE SMALL CAP VALUE FUND ADVISOR CLASS N/L (PASVX)	A	Dividend	J	T	Buy	10/23/17	J	
81.					Sold (part)	11/15/17	J		

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82. WESTERN ASSET TOTAL RETURN UNCONSTRAINED FUND CLS I N/L (WAARX)	A	Dividend	J	T	Buy	10/23/17	J		
83. ISHARES TR CORE US AGGBD ET (AGG)	A	Distribution	J	T	Buy	10/24/17	J		
84. ISHARES TR MIN VOL USA ETF (USMV)	A	Dividend	J	T	Buy	11/16/17	J		
85. ISHARES TR CORE MSCI EAFE (IEFA)	A	Dividend	J	T	Buy	10/24/17	J		
86.					Buy (add'l)	11/16/17	J		
87. VANGUARD INDEX FUNDS S&P 500 ETF SHS NEW (VOO)	A	Dividend	J	T	Buy	10/24/17	J		
88.					Sold (part)	11/16/17	J		
89. RETIREMENT SAVINGS PLAN #1 (H)									
90. VANGUARD INST TR 2035	A	Dividend	J	T	Buy	02/09/17	J		
91. EDUCATION ACCOUNTS (H)									
92. MARYLAND COLLEGE INVESTMENT PLAN PORTFOLIO 2021		None			Closed	05/30/17	J		
93. MARYLAND COLLEGE INVESTMENT PLAN PORTFOLIO 2024		None			Closed	05/30/17	J		
94. MARYLAND COLLEGE INVESTMENT PLAN PORTFOLIO 2027		None			Closed	05/30/17	M		
95. BRIGHT START BLENDED AGE BASED 7-9 YEARS PORTFOLIO		None			Closed	05/30/17	J		
96. 529 ACCOUNT #1 (H)									
97. NEST NE 529 AGE BASED GROWTH 15-18 CLASS A M/F (NEFEA)		None	M	T	Buy	06/07/17	M		

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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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)
98.					Buy (add'l)	11/29/17	J		
99. 529 ACCOUNT #2 (H)									
100. NEST NE 529 AGE BASED GROWTH 6-10 CLASS A M/F (NASTA)		None			Buy	06/07/17	J		
101.					Sold	07/07/17	J		
102. NEST NE 529 AGE BASED GROWTH 11-14 CLASS A M/F (NEEFA)		None	J	T	Buy	07/07/17	J		
103. 529 ACCOUNT #3 (H)									
104. NEST NE 529 AGE BASED GROWTH 6-10 CLASS A M/F (NASTA)		None	K	T	Buy	06/07/17	K		
105. WHOLE/UNIVERSAL LIFE INSURANCE POLICIES (H)									
106. METLIFE FLEXIBLE PREMIUM VARIABLE LIFE	A	Interest	J	T					
107. NORTHWESTERN MUTUAL LIFE		None	K	T					
108. NORTHWESTERN MUTUAL VARIABLE LIFE INVESTMENT POLICY (H)									
109. NORTHWESTERN MUTUAL US EQUITY LARGE CAP	A	Dividend	J	T					
110. NORTHWESTERN MUTUAL US EQUITY MID CAP	A	Dividend	J	T					
111. NORTHWESTERN MUTUAL US EQUITY SMALL CAP	A	Dividend	J	T					
112. NORTHWESTERN MUTUAL INT'L DEVELOPED MKTS	A	Dividend	J	T					
113. NORTHWESTERN MUTUAL REAL ESTATE SECURITIES	A	Dividend	J	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	

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

Part VII, lines 29 and 48: Symbol changes only.

Part VII, lines 106 and 107: These policies do not have individual underlying investments.

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value, per page 42 of the filing instructions.

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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/ **Kimberly C. Priest Johnson**

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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