

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2013

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) Overstreet, Karen A.	2. Court or Organization U.S. Bankruptcy Court - WD Wa	3. Date of Report 05/07/2014
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Bankruptcy Judge-Full time	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2013 to 12/31/2013
7. Chambers or Office Address U.S. Courthouse 700 Stewart St., Rm. 7216 Seattle, WA 98101		
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. Judicial Liaison	CENTS (Consumer Education and Training Services), 501(c)(3) entity
2. Member, Limited Liability Company	Family, LLC
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.	

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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.		
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. 2013	Salaried attorney-contract partner - [REDACTED]
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. American Bankruptcy Institute - CARE (Credit Abuse Resistance Education)	4/17-4/20/2013	National Harbor, Maryland	Advisory Committee member attendance at ABI Spring meeting	meals, lodging, transportation
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. IBM Common Stock	B	Div	L	T					
2. Microsoft Common Stock	D	Dividend	N	T					
3. USAA Tax Exempt Money Market Fund	A	Dividend	K	T					
4. Black Rock Global Allocation Fund (formerly Merrill Lynch)	A	Dividend	K	T					
5. Brandes International Fund		None	N	T					
6. AT&T Common Stock	A	Dividend	J	T					
7. USAA G&I Fund #1	A	Dividend	K	T					
8. Gravina Island Partnership		None	J	V					
9. USAA G&I Fund #2	A	Dividend	K	T					
10. Alaska Power & Telephone Common Stock/ Appraisal 12/31/08	A	Dividend	L	Q					
11. PIMCO Total Return Fund		None	O	T					
12. Spokane Cnty, WA G/O Seires C	A	Interest			Redeemed	06/03/13	K	A	
13. Seattle WA Ref Bonds 2005	B	Interest	K	T					
14. Comcast Capital Corp. Common Stock	A	Dividend	J	T					
15. Fundamental Investors Fund		None	O	T					
16. Payden Short Term Bond Fund		None			Sold	03/31/13	M	A	
17. Tamarack FDS Prime (formerly Great Hall,UTS EF Hutton #8398)	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 \$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. Tamarack FDS Prime (formerly Great Hall Invst FDR)	A	Dividend	J	T					
19. Allez PhysiOnix Ltd. Common stock		None	J	T					
20. Washington Health Care- Group Health Bonds	B	Interest	K	T					
21. Levelland TX Cons ISD GO Bonds	B	Interest	K	T					
22. Goldman Sachs Small Cap Valuefund		None	M	T					
23. T Rowe Price Mid Cap Value		None	M	T					
24. King County WA Rural GO	B	Interest	L	T					
25. Bristol Myers Squibb	B	Dividend	K	T					
26. Aston Optimum Mid cap (formerly ABN AMRO Midcap)	A	Dividend	K	T					
27. Artisan International Fund	A	Dividend	J	T					
28. Harbor Cap MF	A	Dividend	K	T					
29. Puget Sound Bank	A	Interest	L	T					
30. Schwab Municipal Money Market Fund	A	Dividend	J	T					
31. Port of Seattle Revenue Ref Intermediate Lien	B	Interest	K	T					
32. Pierce County WA #1 GO	B	Interest	K	T					
33. Renton WA GO	B	Interest	K	T					
34. Cowlitz County WA Pub Utility District #1	B	Interest	K	T					

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

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35. Alaska Mun Bd Bk AkGO	B	Interest	K	T					
36. Klickitat Cnty WA PUD #1	B	Interest	K	T					
37. Port Everett Wash Rev	B	Interest	K	T					
38. Snohomish Cnty Wash School Dist GO	B	Interest	K	T					
39. Ishares MSCI EAFE Index	A	Dividend	K	T					
40. North Thurston Public Schools WASH G/O (KO Rollover)	B	Interest	L	T					
41. Snohomish County WA School Distr. Everett G/O RFDG	B	Interest	K	T					
42. Ishares Core S&P ETF (Midcap), formerly Ishares S&P Midcap	A	Dividend	L	T					
43. Ishares S&P Small Cap	A	Dividend	M	T					
44. Ishares S&P TR Dow Jones US Real Estate	A	Dividend	K	T					
45. Ishares Core S&P ETF (500), frmy Ishares Trust S&P 500 Index	A	Dividend	K	T					
46. Seattle Wash Wtr Sys Water Rev 2003 (DR)	A	Int./Div.			Redeemed	09/03/13	K	A	
47. Central Puget Sound GO Regl Trans. Auth. (DR)	B	Interest	K	T					
48. Wash State Various Purp GO BUS 2009 A (DR)	B	Interest	L	T					
49. Seattle Wash Water Sys Rev RFDG (DR)	B	Interest			Redeemed	09/03/13	K	A	
50. King County Wash Pub Trans Sales Tax Bus 2004 (DR)	B	Interest	K	T					
51. King County Limited Sewer G/O 2009	B	Interest	M	T					

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52. Tacoma WA Solid Waste Water/Sewer 2006B	B	Interest	K	T					
53. King County Limited Tax G/O Sewer 2008 (Essential Service)	B	Interest	L	T					
54. Central Puget Sound Regl Sound Transit 2007A	B	Interest	L	T					
55. IShares EMRG Mkt Fd (Sonata)	A	Dividend	K	T					
56. IShares Russell 1000 Val (Sonata)	A	Dividend	K	T					
57. Goldman Sachs GRP Inc Mtn BE due 2024	A	Interest			Sold	05/21/13	J	A	
58. Merck & Co	B	Dividend	K	T					
59. New Economy Fund SB/Class A		None	J	T	Buy	10/1/13	J		
60. Exelon Corp.		None			Sold	01/02/13	K		
61. AT&T, Inc.	B	Dividend	K	T					
62. American Mutual Fund Class A	A	Dividend	K	T	Buy	10/1/13	K		
63. Altria Group, Inc.	A	Dividend	K	T					
64. Dow Chemical	A	Dividend	K	T	Buy	3/18/13	K		
65. Verizon Communications, Inc.	A	Dividend	K	T					
66. Southern Co.	A	Dividend	K	T					
67. PS Business Parks, Inc.	A	Interest	K	T	Buy	03/18/13	K		
68. American Mutual Fund, Inc.	A	Dividend	K	T					

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69. Capital World Growth & Income Fund Class A	A	Dividend	K	T	Buy	10/01/13	K		
70. Euro Pacific Growth Fund	A	Dividend	K	T	Buy	10/01/13	K		
71. Fundamental Investors, Inc.	A	Dividend	K	T	Buy	10/01/13	K		
72. New World Fund Inc.	A	Dividend	J	T	Buy	10/01/13	J		
73. New Economy Fund SBI	A	Dividend	J	T	Buy	10/01/13	J		
74. New Perspective Fund, Inc.	A	Dividend	J	T	Buy	10/01/13	J		
75. SmallCap World Fund, Inc.	A	Dividend	J	T	Buy	10/01/13	J		
76. ConocoPhillips-COP (Dain)	B	Dividend	K	T					
77. Canadian Imperial Bank	A	Interest	K	T	Buy	05/01/13	K		
78. EPR Properties/Entertainment Properties Trust-EPR.C	C	Interest	K	T					
79. Kinder Morgan Inc.	A	Dividend	K	T					
80. Intel Corp.	B	Dividend	K	T					
81. Duke Energy Corp.	B	Dividend	K	T					
82. Westcore Growth Fund (Sonata)	A	Dividend	J	T					
83. Westport Fund Class R (Sonata)	A	Dividend	K	T					
84. Sound Shore Fund, Inc. (Sonata)	A	Dividend	K	T					
85. Mainstay ICap Select EQ (Sonata)	A	Dividend	K	T					

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86. IShares Russell 1000 Growth (Sonata)	A	Dividend	J	T					
87. New York, NY GO UTX 3% (Sonata)	A	Interest	K	T					
88. New York, NY GO UTX 3.75% (Sonata)	A	Interest	K	T					
89. Austin, TX GO LTX 3% (Sonata)	B	Interest	K	T					
90. Baron Small Cap Institutional Index (JAR Ret)		None	J	T					
91. Columbia TR Focused Large Cap (JAR Ret)		None	N	T					
92. New York, NY GO TX (Sonata) 3.75%	A	Interest	J	T	Buy	08/01/13	J		
93. Galliard Retirement Income Fund (JAR Ret)		None	M	T					
94. Invesco International Growth Eq TR (JAR Ret)		None	J	T					
95. Vanguard Institutional Index (JAR Ret)		None	N	T					
96. Ivy Mid Cap Growth I (JAR 401k)		None	M	T					
97. Vanguard Equity Income Fund	A	Dividend	K	T	Buy	01/07/13	K		
98. Vanguard Global ex-US Real Estate Index	A	Dividend	J	T	Buy	01/07/13	J		
99. Vanguard REIT Index Fund	A	Dividend	K	T	Buy	01/07/13	K		
100. Vanguard US Growth Fund		None	K	T	Buy	01/07/13	K		
101.									
102.									

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127.									
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133.									
134.									
135.									
136.									

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

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)
137.									
138.									
139.									
140.									
141.									
142.									
143.									

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

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Name of Person Reporting

Overstreet, Karen A.

Date of Report

05/07/2014

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

Alaska Power & Telephone stock was appraised on 12/31/11 at \$21.13 per share.

Family, LLC has no reportable assets at this time which are held as investments or for the production of income.

Gravina Island Partnership: Karen Overstreet Date: 1/90 Cost: \$41

Date: 1/90 Cost: \$59

FINANCIAL DISCLOSURE REPORT

Page 14 of 14

Name of Person Reporting

Overstreet, Karen A.

Date of Report

05/07/2014

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/ Karen A. Overstreet**

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