

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) McKittrick, Peter C.	2. Court or Organization United States Bankruptcy Court, District of Oregon	3. Date of Report 11/15/2016
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) US Bankruptcy Judge	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 1001 SW 5th Avenue Suite 700 Portland Or. 97204		
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.	President, Secretary	McKittrick, Inc. See Part 8
2.	Co-Trustee	Trust #1 - Revocable Living Trust
3.	Co-Trustee	Trust #2 - Revocable Living 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. 2015	McKittrick Inc (fiduciary services) continues to make distributions to its owner based upon receipts of chapter 7 trustee commissions. See part 8
2. 2015	McKittrick Inc. 401k pension and profit sharing plan. Participant. Plan terminated effective 4/15/15
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.)*

DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1. 2015	McKittrick, Inc Trustee & Fid Svc - Form 1120-S - Pass through income from K-1	\$120,546.00
2. 2015	Farleigh Wada Witt - final payment of any future collected fees. See Note Part 8	\$18,695.00
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.	
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. NCBJ	10/15	Miami Fla	NCBJ conference lodging	Hotel Reimbursement for two nights for NCBJ conference and attendance at annual meeting
2. Oregon State Bar	9/15	Sunriver, Or	Debtor Creditor Annual Meeting-speaker and attendee, and planner	Lodging and mileage, registration
3. Northwest Bankruptcy Institute	4/15	Portland, Or.	NWBI Annual conference, member planning committee and speaker, and attendee	Registration fee, faculty dinner

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4.	Legal Aid Services of Oregon	12/15	Pendleton Or	Speak at Legal Aid pro bono CLE for volunteer attorneys	Plane, hotel.
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.)*

	<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.	Bank of America	Mileage Plus Credit Card-revolving credit card	J
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. Brokerage #1 (Rollover IRA) (H) - Listed as "Brokerage #2" in prior yr									
2. - Morgan Stanley Bank N.A. (Bank Deposit Program)	A	Interest	J	T					
3. - ABB (Common)	A	Dividend	J	T					
4. - AAPL (Common)	A	Dividend	J	T					
5. - T (Common)	A	Dividend	J	T					
6. - ABX (Common)	A	Dividend			Sold	10/20/15	J	A	
7. - BMO (Common)	A	Dividend	J	T					
8. - BMY (Common)	A	Dividend	K	T					
9. - CVX (Common)	A	Dividend	J	T					
10. - CSCO (Common)	A	Dividend	K	T					
11. - COP (Common)	A	Dividend	J	T					
12. - GRMN (Common)	A	Dividend			Sold	10/20/15	J	A	
13. - GPC (Common)	A	Dividend	J	T					
14. - GILD (Common)	A	Dividend	J	T	Buy	03/04/15	J		
15. - GSK (Common)	A	Dividend	J	T					
16. - GOOG (Common) -Google Inc name changed to Alphabet Inc.		None	J	T					
17. - GOOGL (Common) - Google Inc name changed to Alphabet, Inc.		None	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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18. - GRC (Common)	A	Dividend	J	T	Buy (add'l)	07/31/15	J		
19. - INTC (Common)	A	Dividend	J	T					
20. - IBM (Common)	A	Dividend	K	T					
21. - LMNR (Common)	A	Dividend	J	T					
22. - MAT (Common)	A	Dividend	J	T					
23. - MRK (Common)	A	Dividend	J	T					
24. - MSFT (Common)	A	Dividend	J	T					
25. - NSRGY (Common)	A	Dividend	J	T					
26. - NUE (Common)	A	Dividend			Buy (add'l)	02/02/15	J		
27. - NUE (Common)(H)					Sold	04/27/15	J	A	
28. - PSO (Common)	A	Dividend	J	T	Buy (add'l)	10/22/15	J		
29. - PG (Common)	A	Dividend	J	T					
30. - PLD (Common)	A	Dividend	J	T					
31. - QCOM (Common)	A	Dividend	J	T	Buy (add'l)	11/05/15	J		
32. - SGMO (Common)		None	J	T					
33. - SGEN (Common)		None	J	T	Buy	01/26/15	J		
34. - TOT (Common)	A	Dividend	J	T					

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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. - UPS (Common)	A	Dividend	J	T					
36. - VLO (Common)	A	Dividend	J	T					
37. - VEOEY (Common)	A	Dividend	J	T					
38. - VZ (Common)	A	Dividend	J	T					
39. - VGK (Common)	A	Dividend	J	T	Buy	04/27/15	J		
40. - VFH (Common)	A	Dividend	J	T					
41. - VWO (Common)	A	Dividend	J	T					
42. - VBR (Common)	A	Dividend	J	T					
43. - Illinois St Genl Oblig Build America Bond 4.7% Matures 3/1/16	A	Interest	J	T					
44. - Chicago Ill Brd Ed Ser-E Build America Bond	A	Interest	J	T					
45. - Chicago Ill Genl Oblig-B Build America Bond	A	Interest	J	T					
46. - Burbank Calif Wtr & Pwr Wtr Rev Ser-B Build America Bond	A	Interest	J	T					
47. - General Elec Cap Corp Bond	A	Interest			Matured	06/29/15	J	A	
48. - Pitney Bowes Inc Bond 4.750% Matures 5/15/18	A	Interest	J	T					
49. - Hewlett-Packard Co Bond	A	Interest	J	T					
50. - Baxter Intl Inc Bond	A	Interest	J	T					
51. - Burlington North Santa Fe Corp Bond	A	Interest	J	T					

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52. - Teva Pharmaceut Fin BV Bond	A	Interest	J	T					
53. - Goldman Sachs Group Inc Bond	A	Interest	J	T					
54. - Wells Fargo & Co Bond	A	Interest	J	T					
55. - Verizon Communications Bond	A	Interest	J	T					
56. - JPMorgan Chase & Co Bond	A	Interest	J	T					
57. - Fed Natl Mtg Assn Step	A	Interest	J	T					
58. -RF (Common)	A	Dividend	J	T	Buy	08/13/15	J		
59. Illinois St Genl Oblig Build America Bond 5.363% Matures 2/1/19	A	Interest	J	T					
60. Ebay Inc Corporate Bond	A	Interest	J	T	Buy	06/12/15	J		
61. Pitney Bowes Inc Corporate Bond 4.625% Matures 3/15/24	A	Interest	J	T					
62. -CAG (Common)	A	Dividend			Sold	03/25/15	J	A	
63. Brokerage #2 (Trust #1) (H) - Shown as Brokerage Acct #3 in prior year									
64. - Fidelity Investments Core Account (Cash)	A	Interest	J	T					
65. Brokerage #3 (Trust #1) (H)- Shown as Brokerage Acct #4 in prior yr									
66. - AIG (Common)	A	Dividend	J	T					
67. - JNJ (Common)	A	Dividend	J	T					
68. - NNBR (Common)	A	Dividend	K	T					

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69. - OCAT (Common)		None	K	T					
70. - RDN (Common)	A	Dividend	K	T					
71. -KKUR (Common)		None	J	T					
72. - Fidelity Cash Reserves	A	Interest	M	T					
73. - Fidelity Investments Core Account (Cash)	A	Interest	N	T					
74. M.C. McKittrick Family LLC (H)									
75. - Rental Property #1, Sacramento, CA	A	Distribution	M	W					
76. - Rental Property #2, League City, Texas	D	Distribution			Sold	08/21/15	L	F	Unknown
77. - Rental Property #3, Detroit, Michigan	B	Distribution	K	W					
78. - Rental Property #4, Loveland, Ohio (Y)									
79. - Rental Property #5, St Paul, MN (Y)									
80. Brokerage #4 (H) - Shown as Brokerage #5 in prior year									
81. - Morgan Stanley Bank N.A. (Bank Deposit Program)	A	Interest	J	T					
82. - CVX (Common)	A	Dividend	J	T					
83. - CSCO (Common)	A	Dividend	J	T					
84. - MSFT (Common)	A	Dividend	J	T					
85. - MSI (Common)	A	Dividend	J	T					

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86. - WMT (Common)	A	Dividend	J	T					
87. - American Funds - Growth Fund of America A	A	Dividend	J	T					
88. - American Funds - Smallcap World Fund A	A	Dividend	J	T					
89. - American Funds - Washington Mutual Investor Fund A	A	Dividend	J	T					
90. Oregon College Savings Plan #1-Age Based Portfolio 18 and Over		None	K	T					
91. Oregon College Savings Plan #2-Age Based Portfolio 18 and Over		None	K	T					
92. Brokerage #5 (H)- Shown as Brokerage #6 in prior year.									
93. -Charles Schwab Cash Holding Account	A	Interest	J	T					
94. Brokerage #6 (H) - Shown as Brokerage #7 in prior year.									
95. Apex Wintrust Bank - SKOK, Insured Bank Deposit Program		None	J	T					
96. - SLV - iShares Silver Trust		None	J	T	Buy (add'l)	01/23/15	J		
97. - NNBR (Common)	A	Dividend	J	T	Buy (add'l)	03/23/15	J		
98. -RDN (Common)	A	Dividend	J	T	Buy	01/23/15	J		
99. -T (Common)	A	Dividend	J	T	Buy	01/23/15	J		
100. -FCAU (Common)			J	T	Buy	01/23/15	J		
101. -OREX (Common)					Buy	01/23/15	J		
102. -OREX (Common)					Sold	03/03/15	J		

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103. - Fidelity Value Fund Mutual Fund	A	Dividend	J	T	Buy (add'l)	01/23/15	J		
104. -Guggenheim S&P 500 Equal Weight ETF - RSP	A	Dividend			Buy	01/23/15	J		
105. -Guggenheim S&P 500 Equao Weight ETF - RSP					Sold	03/23/15	J		
106. Brokerage #7 (Trust #3 - residual beneficiary trust) (H)- FKA #8									
107. - Schwab Money Market Fund		None	K	T					
108. - Charles Schwab Cash Account (X)		None	J	T					
109. - Vanguard High Yield Tax Exempt Bond Fund		None	K	T					
110. - Vanguard Interm Term Tax Exempt Bond Fund		None	K	T					
111. - Vanguard Long Term Tax Exempt Bond Fund		None	K	T					
112. - Vanguard LTD Term Tax Exempt Bond Fund		None	J	T					
113. - Vanguard Intl Growth Fund		None	K	T					
114. - Vanguard Small Cap Index Fund		None	L	T					
115. - Vanguard Total Intl Stk Index Fund		None	L	T					
116. - Vanguard Total Stock Mkt Index Fund		None	L	T					
117. - Vanguard 500 Index Fd Equity Fund		None	L	T					
118. - Vanguard FTSE Emerging Markets ETF		None	J	T					
119. - Vanguard Total Stock Market ETF		None	L	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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McKittrick, Peter C.

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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)
120. Brokerage #8 (IRA) (H) - Shown as Brokerage #9 in prior year									
121. - Wedbush Cash Holding Account	A	Interest	L	T					
122. - FDX (Common)	A	Dividend	J	T					
123. Brokerage #9 (IRA) (H) - Shown as Brokerage #10 in prior year.									
124. - Wedbush Cash Holding Account	A	Interest	O	T					
125. Hawksbeard Ventures LLC (H)									
126. - Rental Property, Black Butte Ranch, OR		None	M	W					
127. American General Life Insurance Co Variable Life VIP Index 500 (CSV)	A	Int./Div.	K	V					
128. Bank of America Account - Checking		None	J	T					
129. Note - Farleigh Wada Witt (Y)									
130. McKittrick Inc - shareholder interest		None	L	U					
131. Key Bank Account - Checking (X)		None	J	T					
132. Stancorp Financial Stock-SFG (Common)	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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Name of Person Reporting

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

Part I Positions.

Trust #2 has no reportable assets

Part VII Investments and Trusts

Line 1 - Brokerage #1 - this account was listed as "Brokerage #2" in prior year.

Line 43 - Illinois St Genl Oblig Build America Bond 4.7% Matures 3/1/16 - this item was listed on Line 13 in the prior year report with no value in Column C.

This was an error on the prior year report. Column C(1) should have been "J" and Column C(2) should have been "T".

Line 48 - Pitney Bowes Inc Bond 4.750% Matures 5/15/18 - this item was listed on line 19 in the prior year report with no value in Column C. this was an error in the prior year report. Column C(1) should have been "J" and Column C(2) should have been "T".

Line 59 - Illinois St Genl Oblig Build America Bond 5.363% Matures 2/1/19 - this item was listed on Line 68 in the prior year report.

Line 61 - Pitney Bowes Inc Corporate Bond 4.625% Matures 3/15/24 - this item was listed on Line 73 in prior year report.

Line 62 - CAG (Common) - this item was erroneously omitted on prior year report. In prior year report column C(1) should have been "J" and Column C(2) should have been "T".

Line 63 - Brokerage #2 - this account was listed as "Brokerage #3" in prior year

Line 63 - Brokerage #2 - prior year stock holdings of OCAT (Common)(J) and RDN (Common)(J), transferred to Brokerage #3 during the year. These holdings were inadvertently omitted from prior year report.

Line 65 - Brokerage #3 - this account was listed as "Brokerage #4" in prior year

Line 76 - Rental property held in Trust sold to unknown buyer.

Line 80 - Brokerage #4 - this account was listed as "Brokerage #5" in prior year

Line 90 - Oregon College Savings Plan #1 - This is a 529 Account. The provider does not disclose earnings within the account. The periodic statements reflect increases or decreases in account value, contributions and withdrawals. If there are interest, dividends or capital gains earned in this account, they are not separately disclosed but rather are a component of any increase/decrease on the account value.

Line 91 - Oregon College Savings Plan #2 - This is a 529 Account. The provider does not disclose earnings within the account. The periodic statements reflect increases or decreases in account value, contributions and withdrawals. If there are interest, dividends or capital gains earned in this account, they are not separately disclosed but rather are a component of any increase/decrease on the account value.

Line 92 - Brokerage #5 - this account was listed as "Brokerage #6" in prior year

Line 94 - Brokerage #6 - this account was listed as "Brokerage #7" in prior year

Line 106 - Brokerage #7 - this account was listed as "Brokerage #8" in prior year

Line 120 - Brokerage #8 - this account was listed as "Brokerage #9" in prior year

Line 123 - Brokerage #9 - this account was listed as "Brokerage #10" in prior year

Line 127 - The value is cash surrender value (CSV)

Line 132 - Stancorp Financial Stock - SFG (Common) - This holding was inadvertently omitted from prior year report.

Part I

McKittrick Inc was dissolved as of 12/31/15 and filed its last tax return. Any future commissions received from former Chapter 7 Trustee cases will be shown on Schedule C of individual tax return on my 2016 personal tax return.

Part II

The Services Agreement is terminated effective December 31, 2015 upon the dissolution of McKittrick Inc.

Part III

Pursuant to my agreement with my former law firm, which I left in 2012, I was entitled to a percentage of receipts from collections of fees on certain cases. Since some of the cases had not yet paid when I was preparing to take the bench, the firm agreed to pay me a lump sum in lieu of future commissions. Those amounts, along with final repayment of a note I was owed for my stock in the firm, were paid in full the last part of December 2014, and the first week of January 2015.

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Name of Person Reporting

McKittrick, Peter C.

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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/ **Peter C. McKittrick**

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