

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2016

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) Bowdre, Karon O.	2. Court or Organization U.S. District Court, Alabama	3. Date of Report 08/14/2017
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Judge - Active	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2016 to 12/31/2016
7. Chambers or Office Address Hugo Black Courthouse 1729 Fifth Avenue North Birmingham, AL 35203		
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. Proprietor	
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. 2001	Samford University (Defined Benefit Plan) - vested benefits in plan of former employee
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.)*

DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1. 2016		\$0.00
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.)*

DATE	SOURCE AND TYPE
1. 2016	Self-Employed Law Practice
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. Pepperdine University School of Law Byrne Judicial Clerkship Institute	03/16/2016 - 03/18/2016	Malibu, CA	Presenter	Reimbursement for airfare
2. Alabama State Bar Annual Meeting	06/22/2016 - 06/24/2016	Point Clear, AL	Participant	Provision for hotel
3. Federal Judicial Conference	09/27/2016 - 09/30/2016	Ashville, NC	Southern Region Inter-Court Conference	Reimbursement for travel, hotel and meals
4. Local Courts Fund	10/31/2016 - 11/02/2016	Palm Beach, FL	MDL Transferee Judges' Conference	Reimbursement for travel, hotel, parking and meals
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.	Alabama Farm Credit, FLCA	Mortgage on LLC #5	N
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. [REDACTED] LLC Real Estate I Birmingham, Alabama	C	Rent	K	W					
2. First Commercial Bank Acct	A	Interest	J	T					
3. Fundamental Investors	A	Dividend	J	T	Sold (part)	05/12/16	J	B	
4. Growth Fund of America	A	Dividend	J	T	Sold (part)	05/12/16	J	B	
5. Morgan Stanley Private Bank NA	A	Dividend	K	T					
6. Clearbridge Value Trust	A	Dividend	L	T					
7. Fundamental Investors Fund (IRA)	A	Dividend	J	T					
8. Growth Fund of America (IRA)	A	Dividend	J	T					
9. New Perspective Fund (IRA)	A	Dividend	K	T					
10. Small Cap World Fund (IRA)	A	Dividend	J	T	Sold (part)	08/17/16	J	D	
11. Cap World Growth & Inc (IRA)	B	Dividend	L	T					
12. Invest. Co. of America (IRA)	B	Dividend	L	T					
13. Wash. Mutual Inv. Fund (IRA)	B	Dividend	L	T					
14. Trust I; Inc. Bene.; Spouse = Trustee (H)									
15. - [REDACTED] LLC	D	Int./Div.	N	W					
16. - Vanguard Intermediate Tax Exempt Fund	A	Dividend	K	T	Sold (part)	04/13/16	J	A	
17.					Sold (part)	06/06/16	J	A	

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 - \$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. - Vanguard Prime Money Market Fund	A	Dividend	J	T					
19. Regions Bank Acct.	A	Interest	M	T					
20. Trust II; Inc. Bene.; Spouse=Trustee (H)									
21. - [REDACTED] LLC	E	Int./Div.	P1	W					
22. - [REDACTED] LLC	A	Int./Div.	J	W					
23. - [REDACTED] LLC	D	Int./Div.	L	W					
24. - Vanguard Intermediate Term Tax Exempt Fund	B	Dividend	K	T	Sold (part)	04/13/16	J	A	
25.					Sold (part)	06/06/16	J	A	
26.					Sold (part)	09/14/16	J	A	
27. - Vanguard Balanced Index Fund	B	Dividend	L	T	Sold (part)	04/13/16	J	A	
28.					Sold (part)	06/06/16	J	A	
29. - Vanguard Prime Money Market Fund	A	Dividend	J	T					
30. 401(k) #1 (H)									
31. - Dodge & Cox Stock Fund	E	Dividend	M	T	Buy (add'l)	12/31/16	J		
32. - Vanguard 500 Index Adm	D	Dividend	M	T	Buy (add'l)	12/31/16	J		
33. - Vanguard Mid Cap U.S. Stock	B	Dividend	L	T	Buy (add'l)	12/31/16	J		
34. - Hartford Midcap	B	Dividend	K	T	Buy (add'l)	12/31/16	J		

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35. - Vanguard Small Cap Index Adm	D	Dividend	M	T	Buy (add'l)	12/31/16	J		
36. - Vanguard International Value Inv	A	Dividend	M	T	Buy (add'l)	12/31/16	J		
37. - Vanguard International Explorer Inv	A	Dividend	K	T	Buy (add'l)	12/31/16	J		
38. - PIMCO Total Return Instl	A	Dividend	L	T	Buy (add'l)	12/31/16	J		
39. - PIMCO High Yield Instl	B	Dividend	L	T	Buy (add'l)	12/31/16	J		
40. Lawfirm Cap. Contrib (see Part VIII)		None	K	W					
41. Trust III; Inc. Bene; Life Ins; Trustee = Spouse; (see Part VIII)		None	K	W					
42. Trust IV; Inc. Bene.; Life Ins.; Trustee = Spouse (see Part VIII)		None	K	W					
43. Merrill Lynch Bank of America, N.A. Fund	A	Interest	J	T					
44. Merrill Lynch Bank of America, N.A. Fund	A	Interest	J	T					
45. Perkins Fd - Small Cap & Value Fund (IRA)	A	Dividend	K	T					
46. T. Rowe Price Mid-Cap Growth Fund (IRA)	A	Dividend	L	T					
47. Metlife (New England Financial) Perm Life Ins.	A	Int./Div.	K	T					
48. T. Rowe Price Mid Cap Growth Fund	A	Dividend	J	T	Sold (part)	05/12/16	J	B	
49. Capital World Growth	A	Dividend	K	T					
50. Capital World Growth	A	Dividend	K	T	Buy (add'l)	08/26/16	J		
51. American Fundamental Investors Class F	B	Dividend	M	T					

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52. Fidelity Funds Cash Reserves	A	Dividend			Sold	07/18/16	J	A	
53. Voya - Reliastar Life Policy; (see Part VIII)	A	Dividend	K	T					
54. [REDACTED] LLC, Real estate investment; Birmingham, AL	D	Distribution	M	W					
55. New World Fund	A	Dividend	K	T					
56. American Tax Exempt Bond Fund CL-C	B	Dividend	L	T	Buy (add'l)	10/20/16	J		
57. Cap Inc Bldr FD CLC	B	Dividend	J	T	Buy (add'l)	08/26/16	J		
58. Fundamental Inv. Inc	C	Dividend	J	T	Buy (add'l)	10/20/16	J		
59. New World Fund	A	Dividend			Sold	02/11/16	J		
60. Income Fund America	A	Dividend	K	T	Buy (add'l)	08/26/16	J		
61. American Tax Exempt Bond Fund CL-C	A	Dividend	K	T					
62. Cap Inc. Bldr CL C	A	Dividend	J	T					
63. Cap World Growth & Inc.	A	Dividend	J	T					
64. Bank of America, N.A.	A	Dividend	J	T					
65. American Bond Fund	A	Dividend	K	T					
66. American Century Equity Income	A	Dividend	J	T					
67. American Bond Fund of America	A	Dividend	J	T					
68. Neuberger Berman Equity	A	Dividend	J	T					

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69. First Commercial Bank	A	Interest	J	T					
70. American Washington Mutual Investors	A	Dividend	J	T	Buy (add'l)	08/26/16	J		
71. American Tax Exempt Bd Fd	A	Dividend	J	T					
72. American High Income Trust Fd	A	Dividend	J	T					
73. Janus High Yield Fund	A	Dividend	J	T					
74. Janus High Yield Fund	C	Dividend	L	T					
75. Fidelity Adv Strategic	B	Dividend	K	T					
76. Bank of America, N.A.	A	Interest	J	T					
77. Deutsche Global	A	Dividend			Sold	09/13/16	J	A	
78. Deutsche Global	B	Dividend			Sold	09/09/16	L	D	
79. Hartford Life Ins. Policy	B	Dividend	M	T					
80. First Commercial Bank	A	Interest	J	T					
81. Bank of America, N.A.	A	Interest	J	T					
82. Smead Value Fund	A	Dividend	K	T					
83. Deutsche Global Infrastructure	A	Dividend			Sold	09/07/16	J		
84. Smead Value Fund	A	Dividend	L	T					
85. Trust V - Income Bene; (H)									

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86. - [REDACTED] LLC	C	Int./Div.	L	W					
87. Deutsche Global Infrastructure	A	Dividend			Sold	09/07/16	J	A	
88. American CNT Int Term Tax Free Bond	A	Dividend	J	T	Buy (add'l)	08/26/16	J		
89. Amer. Cent. Mid Cap Value Fund	A	Dividend	J	T	Buy (add'l)	01/16/16	J		
90.					Buy (add'l)	08/26/16	J		
91. Amer. High Income Muni Bond Fund	A	Dividend	J	T	Buy (add'l)	08/26/16	J		
92. Royce Total Return Fund	A	Dividend	J	T	Buy (add'l)	08/26/16	J		
93. Smead Value Fund	A	Dividend	J	T	Buy (add'l)	08/26/16	J		
94. T. Rowe Price Summit Muni Inter Fd	A	Dividend	J	T					
95. Congress Mid Cap Growth A	A	Dividend	K	T					
96. American High Income Trust	B	Dividend	K	T					
97. American Century Mid Cap Value	A	Dividend	J	T					
98. American Cnt Interm. Tax Free Bond Fund	A	Dividend	J	T					
99. American High Income Trust Fund	A	Dividend	J	T					
100. [REDACTED] LLC; Birmingham, Alabama	C	Dividend	L	W					
101. Prudential Short Term Corp Bond Fd	A	Dividend			Buy	05/12/16	J		
102.					Sold (part)	08/18/16	J	A	

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103.					Sold	11/28/16	J	A	
104. Smead Value Fund	C	Dividend	K	T	Buy	02/11/16	K		
105. American Century Mid Cap Value Fund	A	Dividend	J	T	Buy	08/26/16	J		
106. American Century Intrmd Term Tax Free Fd	A	Dividend	J	T	Buy	05/11/16	J		
107. T. Rowe Price Overseas Stock Fund	A	Dividend	J	T	Buy	09/07/16	J		
108. T. Rowe Price Overseas Stock Fund	B	Dividend	L	T	Buy	09/09/16	L		
109. Fidelity Adv Strategic Income Fund	A	Dividend	J	T	Buy	08/17/16	J		
110. T. Rowe Price Overseas Stock Fund	A	Dividend	J	T	Buy	09/13/16	J		
111. T. Rowe Price Overseas Stock Fund	A	Dividend	J	T	Buy	09/07/16	J		
112. American Fundamental Investors	A	Dividend	J	T	Buy	01/06/16	J		
113.					Buy (add'l)	08/26/16	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 ~\$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

Bowdre, Karon O.

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

Trust I was reported in Part VIII in prior years, but according to the Committee's instructions, we are now reporting in Part VII.

Trust II was reported in Part VIII in prior years, but according to the Committee's instructions, we are now reporting in Part VII.

401(k) line 30 was reported in Part VIII in prior years, but according to the Committee's instructions, we are now reporting in Part VII.

Lawfirm Capital Contribution (Spouse) is in the law firm of [REDACTED] LLC in Birmingham, AL.

Trust III owns a life insurance policy issued by Phoenix Mutual Life Insurance Company and stock issued by Phoenix Mutual.

Trust IV owns a life insurance policy issued by Northwestern Mutual Life Insurance Company.

Trust V was reported in Part VIII in prior years, but according to the Committee's instructions, we are now reporting in Part VII.

Partial Sales in some holdings did not change year-end category listings.

Deletion of some holdings in previous reported years caused the deletion of certain lines and effectuated a change in numbering for subsequent entries.

Line 101 -- LLC V, owns property in Blount County, AL.

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Name of Person Reporting

Bowdre, Karon O.

Date of Report

08/14/2017

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/ **Karon O. Bowdre**

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