

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) Bade, Bridget S.	2. Court or Organization U.S. District Court, Arizona	3. Date of Report 05/01/2017
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Magistrate Judge - Full Time	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 Sandra Day O'Connor U.S. Courthouse 401 W. Washington Street, Suite 321 Phoenix, Arizona 85003		
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.	Co-Trustee	T&B Trust
2.		
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.)*DATESOURCE AND TYPEINCOME
(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.)*DATESOURCE AND TYPE

1. 2016

Self-Employed Attorney - Thomas W. Bade PLC (1/1/16-12/31/16)

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.)*SOURCEDATESLOCATIONPURPOSEITEMS PAID OR PROVIDED

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.)*SOURCEDESCRIPTIONVALUE

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.)*CREDITORDESCRIPTIONVALUE 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. (H) ACCOUNTS									
2. Arizona Central Credit Union	A	Int./Div.	L	T					
3. (H) BSB ROTH IRA - BAIRD									
4. Aim Invesco Cocomstock	A	Dividend	J	T					
5.	A	Distribution			Buy (add'l)	12/15/16	J		
6. MFS Limited Maturity	A	Dividend	J	T					
7. (H) TWB ROTH IRA - BAIRD									
8. Davis NY Venture	A	Dividend	J	T					
9.	A	Distribution			Buy (add'l)	07/06/16	J		
10.	A	Distribution			Buy (add'l)	12/15/16	J		
11. MFS Limited Maturity	A	Dividend	J	T					
12. (H) MNB COVERDELL ESA - BAIRD									
13. Davis NY Venture	A	Dividend	K	T					
14.	B	Distribution			Buy (add'l)	07/06/16	J		
15.	B	Distribution			Buy (add'l)	12/15/16	J		
16. (H) MTB COVERDELL ESA - BAIRD									
17. Davis NY Venture	A	Dividend	J	T	Sold (part)	08/30/16	J	A	

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

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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.	B	Distribution			Buy (add'l)	07/06/16	J		
19.	A	Distribution			Buy (add'l)	12/15/16	J		
20. Ivy Balanced	A	Dividend			Sold	08/30/16	J	A	
21. XLK Sector Technology Select Sector Spdr (X)	A	Dividend			Sold	08/30/16	J	A	
22. (H) BSB ROLLOVER IRA - BAIRD									
23. Baird Money Market	A	Interest	J	T					
24. ESRX common stock		None	J	T					
25. GE common stock	A	Dividend	J	T					
26. HD common stock	A	Dividend	J	T					
27. MRK common stock	A	Dividend	J	T					
28. MSFT common stock	A	Dividend	K	T					
29. PG common stock	A	Dividend	J	T					
30. XCEL common stock	A	Dividend	K	T					
31. (H) TWB ROLLOVER IRA - BAIRD									
32. Baird Money Market	A	Interest	J	T					
33. MO common stock	A	Dividend	K	T					
34. BAC common stock	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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35. C common stock	A	Dividend	J	T					
36. CSCO common stock	A	Dividend	J	T					
37. COP common stock	A	Dividend	J	T					
38. GE common stock	A	Dividend	J	T					
39. INTC common stock	A	Dividend	J	T					
40. JPM common stock	A	Dividend	J	T					
41. JNJ common stock	A	Dividend	J	T					
42. KHC common stock	A	Dividend	J	T					
43. MRK common stock	A	Dividend	J	T					
44. MSFT common stock	A	Dividend	J	T					
45. MDLZ common stock	A	Dividend	J	T					
46. PM common stock	A	Dividend	K	T					
47. PFE common stock	A	Dividend	J	T					
48. PSX common stock	A	Dividend	J	T					
49. DBO Powershares DB Multi Sector Commodity Trust Oil Fund		None	J	T					
50. XCEL common stock	A	Dividend	J	T					
51. Blackrock S&P 500 Index Investor	A	Dividend	K	T					

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52.	A	Distribution			Buy (add'l)	07/01/16	J		
53.	A	Distribution			Buy (add'l)	12/19/16	J		
54. (H) BSB ROLLOVER IRA - BEACON POINTE									
55. TDAM US Government Portfolio	A	Int./Div.	J	T					
56. iShares Russell 1000 Index Fund	A	Int./Div.	K	T					
57. Cullen Value Fd Hi Dvd Fd	A	Int./Div.	K	T					
58.	A	Distribution							
59. First Eagle Sogen Fds Inc Global	A	Int./Div.	K	T					
60.	A	Distribution							
61. Northern Lights Swan Defined Risk	A	Int./Div.	K	T					
62. Virtus Funds Emerging Mkts Oppy	A	Int./Div.			Sold	03/21/16	J	A	
63. GE common stock	A	Dividend	J	T					
64. GS common stock	A	Dividend	J	T					
65. BlackRock Strategic Income Opps Inv	A	Int./Div.	K	T					
66. Diamond Hill Small Cap	A	Int./Div.	J	T					
67.	A	Distribution							
68. Rbb Bb L/S Research Inv		None	J	T	Buy	03/21/16	J		

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69. (H) TWB & BSB JT TEN - BEACON POINTE									
70. TDAM Municipal Portfolio	A	Int./Div.	J	T					
71. First Eagle Sogen Fds Inc Global	A	Int./Div.	J	T					
72.	A	Distribution							
73. Northern Lights Swan Defined Risk	A	Int./Div.	K	T					
74. Riverpark Wedgewood Institutional	A	Int./Div.	K	T					
75. Virtus Funds Emerging Mkts Oppo Fd		None			Buy	02/03/16	J		
76.					Sold	05/04/16	J	A	
77. Diamond Hill Small Cap	A	Int./Div.	J	T	Buy	11/30/16	J		
78.	A	Distribution							
79. iShares MSCI Emerging Markets		None			Sold	02/03/16	J	A	
80. BAC common stock	A	Dividend	J	T					
81. (H) TWB ROLLOVER IRA - BEACON POINTE									
82. TDAM Municipal Portfolio	A	Int./Div.	J	T					
83. GS common stock	A	Dividend	J	T					
84. Riverpark Wedgewood Institutional	A	Int./Div.	J	T					
85. Diamond Hill Small Cap	A	Int./Div.	K	T					

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86.	A	Distribution							
87. BlackRock Strategic Income Opps Inv	A	Int./Div.	K	T					
88. Metropolitan West Total Return Bond	A	Int./Div.	K	T					
89.	A	Distribution							
90. FPA Crescent Portfolio	A	Int./Div.	J	T					
91.	A	Distribution							
92. Northern Lights Swan Defined Risk	A	Int./Div.	K	T					
93. Rbb Bp L/S Research Inv		None	J	T	Sold (part)	03/21/16	J	A	
94. Virtus Funds Emerg Mkts Oppo Fd		None			Sold	03/21/16	J	A	
95. Oppenheimer Developing Markets Fund	A	Int./Div.	K	T	Buy	03/21/16	J		
96. (H) TWB ROLLOVER IRA - BEACON POINTE - SARATOGA VALUE									
97. TDAM Municipal Portfolio Cl A	A	Int./Div.	L	T					
98. MMM common stock	A	Dividend	J	T					
99. AAPL common stock	A	Dividend	J	T	Buy (add'l)	01/07/16	J		
100.					Buy (add'l)	04/29/16	J		
101. ACN common stock	A	Dividend	J	T	Sold (part)	06/30/16	J	A	
102. ADP common stock	A	Dividend			Sold	06/30/16	J	A	

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103. BAX common stock	A	Dividend			Sold	06/02/16	J	A	
104. BXL common stock	A	Dividend			Sold	05/25/16	J	A	
105. BDX common stock	A	Dividend	J	T					
106. BRK B common stock	A	Dividend	J	T					
107. BIIB common stock		None	J	T	Buy	02/11/16	J		
108. CHRW common stock	A	Dividend	J	T					
109. CTSH common stock		None	J	T					
110. CSCO common stock	A	Dividend	J	T					
111. COH common stock	A	Dividend	J	T					
112. KO common stock	A	Dividend	J	T					
113. IBM common stock	A	Dividend	J	T					
114. JNJ common stock	A	Dividend	J	T					
115. MDT common stock	A	Dividend	J	T					
116. MSFT common stock	A	Dividend	J	T	Sold (part)	01/29/16	J	A	
117. NKE common stock	A	Dividend	J	T					
118. NVO common stock	A	Dividend	J	T	Buy (add'l)	09/29/16	J		
119. OMC common stock	A	Dividend	J	T	Sold (part)	05/19/16	J	A	

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120. ORCL common stock	A	Dividend	J	T					
121. PCP common stock		None			Sold	02/01/16	J	A	
122. PEP common stock	A	Dividend	J	T					
123. PHI common stock	A	Dividend	J	T	Buy	05/19/16	J		
124. PG common stock	A	Dividend	J	T					
125. SYU common stock	A	Dividend			Sold	11/08/16	J	A	
126. TSS common stock	A	Dividend	J	T					
127. UTX common stock	A	Dividend	J	T					
128. VAR common stock	A	Dividend	J	T					
129. WMT common stock	A	Dividend	J	T					
130. (H) LIFE INSURANCE POLICIES									
131. Northwestern Mutual Whole Life	A	Dividend	J	T					
132. Northwestern Mutual Adjustable CompLife	A	Dividend	J	T					
133. Northwestern Mutual Adjustable CompLife	A	Dividend	J	T					
134. Northwestern Mutual Whole Life	A	Dividend	J	T					
135. Northwestern Mutual 65 Life	A	Dividend	J	T					
136. (H) OFFICE CONDO									

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)

137. TBM2 Investments LLC - office condo in Tempe, AZ	E	Rent	N	U					
138.									
139.									
140.									
141.									
142.									
143.									
144.									
145.									
146.									
147.									
148.									

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 I. Positions. The magistrate judge is the co-trustee of the T&B Trust, which is a revocable trust for the benefit of the judge, her spouse and her family. The only assets in the name of the trust are the judge's personal residence and the interests in TBM2 Investments LLC. The residence does not have to be reported in Part VII, and the asset of TBM2 Investments LLC is reported in Part VII, lines 136-37.

Part VII. Different share classes of the same mutual fund have been combined. For example, Riverpark Wedgewood in 2015 had institutional and retail entries. Our financial advisor purchases retail shares with the load waived (class A) and then converts them to institutional shares (class I), which have a lower expense ratio. All retail shares eventually become institutional shares. It is a strategy to reduce overall fund investment expenses. There is no way to report this exchange under the transaction options, and it's not a realization or disposition event. The retail shares are simply exchanged for institutional shares of identical value. Line 74 of this report combines the Riverpark Wedgewood institutional and retail entries from lines 74 and 74 of the 2015 report.

Part VII. Office condo. The membership interests in TBM2 Investments LLC are owned equally by the judge and her spouse through their revocable trust, T&B Trust. The judge's spouse is the manager of the LLC.

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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/ Bridget S. Bade**

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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