

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) Motz, Diana G.	2. Court or Organization Fourth Circuit Court of Appeals	3. Date of Report 5/10/2017
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Fourth Circuit Judge - active	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final	6. Reporting Period 01/01/2016 to 12/31/2016
5b. ☐ Amended Report		
7. Chambers or Office Address U.S. Courthouse 101 West Lombard St., 5th Fl. Baltimore, Maryland 21201		
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. Custodian	College Savings Plan for grandson
2. Trustee	Generation Skipping Trust for Children (GST)
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.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 12

Name of Person Reporting

Motz, Diana G.

Date of Report

5/10/2017

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.	
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.	Judicial Conference	01/06/2016 - 01/08/2016	Washington, DC	Meeting of U.S Judicial Conference Financial Disclosure Committee	Lodging, food, transportation
2.	Administrative Office	05/22/2016 - 05/25/2016	White Sulphur Springs, WV	Circuit judicial conference	Lodging, food, transportation
3.	Judicial Conference	06/15/2016 - 06/18/2016	Portland, OR	Meeting of U.S Judicial Conference Financial Disclosure Committee	Lodging, food, transportation
4.					
5.					

FINANCIAL DISCLOSURE REPORT

Page 3 of 12

Name of Person Reporting

Motz, Diana G.

Date of Report

5/10/2017

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.		
2.		
3.		
4.		
5.		

FINANCIAL DISCLOSURE REPORT

Page 4 of 12

Name of Person Reporting

Motz, Diana G.

Date of Report

5/10/2017

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. Aberdeen Asia Pac Income (FAX) (IRA)	D	Int./Div.	L	T	Sold (part)	04/13/16	K		
2.					Sold (part)	08/01/16	K		
3. Altria Group Inc (MO)	B	Int./Div.	K	T					
4. Apple Inc (AAPL)	D	Dividend	N	T					
5. AT&T Inc (T) (formerly DirecTV Inc)	C	Dividend	L	T					
6. Campbell Soup Co (CPB)	A	Dividend	J	T					
7. Chevron Corp (CVX)	B	Dividend	K	T					
8. CVS Corp (CVS)	B	Dividend	K	T					
9. DFA T A World Ex US Core Equity (DFTWX)	B	Int./Div.	L	T					
10. DFA US Core I (DFEOX)	D	Int./Div.			Sold	01/14/16	N		
11. Duke Realty Corp (DRE)	A	Dividend	K	T					
12. Exxon Mobil Corporation (XOM)	D	Dividend	M	T	Donated (part)	08/01/16	K		
13. Fidelity 500 Index Fund Premium (FUSVX)	E	Int./Div.	O	T	Buy (add'l)	01/14/16	N		
14.					Sold (part)	10/20/16	K		
15. Fidelity Extended Market Index Fund Premium (FSEVX)	D	Int./Div.	L	T	Buy (add'l)	01/14/16	K		
16. Fidelity Cash Reserves (FDRXX) (IRA)	A	Int./Div.	N	T					
17. Fidelity Advisor Floating Rate High Income (FFRHX) (IRA)	C	Int./Div.			Buy (add'l)	01/04/16	K		

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

Page 5 of 12

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18.					Buy (add'l)	05/12/16	K		
19.					Sold	11/03/16	M		
20. Fidelity Md Municipal Income (SMDMX)	C	Int./Div.	M	T					
21. Fidelity Municipal Money Market (FTEXX)	A	Int./Div.			Closed	02/11/16	M		
22. Fidelity Treasury Fund (FZFXX)	A	Int./Div.	M	T	Open	02/11/16	M		
23. General Electric Company (GE)	B	Dividend	K	T					
24. Guggenheim S&P 500 Equal Weight (RSP)	B	Int./Div.	M	T					
25. International Business Machines (IBM)	D	Dividend	M	T	Sold (part)	01/14/16	M		
26. iShares Core S&P Total US Stock Market (ITOT)		None			Buy	01/14/16	M		
27.					Sold	02/09/16	M		
28. iShares Inc Core Msci Emerging Mkts (IEMG)	A	Int./Div.	K	T	Buy	01/04/16	M		
29.					Sold	01/14/16	M		
30.					Buy	06/27/16	K		
31. iShares iBoxx High Yield Corporate Bond (HYG) (IRA)	C	Int./Div.			Buy (add'l)	01/04/16	K		
32.					Buy (add'l)	02/09/16	K		
33.					Sold (part)	10/20/16	K		
34.					Sold	11/03/16	L		

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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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FINANCIAL DISCLOSURE REPORT

Page 6 of 12

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35. iShares MSCI EAFE (EFA)		None			Sold	01/14/16	K		
36. iShares MSCI EAFE Small Cap Index (SCZ)	A	Int./Div.	K	T					
37. iShares MSCI Emerging Mkts Minimum Volatility Index (EEMV)	C	Int./Div.	M	T	Buy	01/14/16	M		
38.					Buy (add'l)	02/09/16	J		
39. iShares Russell 1000 Index (IWB)	D	Int./Div.	N	T					
40. iShares Russell 2000 (IWM)	A	Int./Div.	K	T					
41. iShares S&P 100 Index (OEF)	C	Int./Div.	M	T	Buy	02/09/16	M		
42. iShares S&P 500 Index (IVV)	D	Int./Div.	N	T					
43. iShares S&P 500 Value (IVE)	D	Int./Div.	N	T	Buy	01/22/16	M		
44.					Buy (add'l)	02/09/16	M		
45. iShares S&P Global Timber & Forestry Index (WOOD)		None			Sold	01/14/16	K		
46. iShares S&P SmallCap 600 Citigroup Value Index (IJS)	B	Int./Div.	L	T					
47. iShares S&P SmallCap 600 Index (IJR)	B	Int./Div.	M	T					
48. iShares Trust Core Msci Eafe (IEFA)		None			Sold	02/09/16	L		
49. iShares Trust Core MSCI Total Intl Stk (IXUS) (IRA)		None			Buy	01/04/16	J		
50.					Buy (add'l)	01/14/16	K		
51.					Sold	01/22/16	K		

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FINANCIAL DISCLOSURE REPORT

Page 7 of 12

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52.					Buy	06/27/16	K		
53.					Sold	08/01/16	K		
54. Kraft Heinz Company (KHC) (formerly Kraft Foods Group Inc)	A	Dividend	J	T					
55. Merck & Co Inc (MRK)	B	Dividend	K	T	Sold (part)	01/04/16	J		
56.					Sold (part)	02/09/16	K		
57. Mondelez Intl Inc (MDLZ)	A	Dividend	K	T					
58. Nuveen Build Amer Bd Fd (NBB) (IRA)	B	Int./Div.	K	T	Sold (part)	01/22/16	K		
59.					Sold (part)	02/09/16	L		
60.					Sold (part)	03/15/16	L		
61.					Buy (add'l)	11/11/16	K		
62. Nuveen Build America (NBD) (IRA)	C	Int./Div.	L	T					
63. Nuveen Credit Strategies Income Fund (JQC) (IRA)	D	Int./Div.	M	T	Sold (part)	04/13/16	K		
64. Nuveen MD Prem II (NMY)	D	Int./Div.	M	T					
65. Nuveen Select Tax-Free Income (NXQ)	C	Int./Div.	L	T					
66. Olin Corp (OLN) (formerly Dow Chemical Co)	A	Dividend	J	T					
67. Payden High Income (PYHRX) (IRA)	B	Int./Div.			Buy (add'l)	05/12/16	K		
68.					Sold	11/03/16	L		

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FINANCIAL DISCLOSURE REPORT

Page 8 of 12

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69. Pepsico Incorporated (PEP)	C	Dividend	M	T					
70. Philip Morris Intl Inc (PM)	B	Dividend	K	T					
71. PIMCO Income Instl (PIMIX) (IRA)	C	Int./Div.	M	T	Buy	04/13/16	M		
72. PowerShares Insured Natl Muni Bond (PZA)	B	Int./Div.	L	T					
73. Praxair Inc (PX)	B	Dividend	L	T					
74. SPDR Barclays Capital Short Term High Yield Bond (SJNK) (IRA)	C	Int./Div.			Sold	11/03/16	L		
75. SPDR S&P 500 ETF Trust (SPY)	C	Int./Div.	M	T					
76. Stanley Black & Decker Inc (SWK)	B	Dividend	L	T					
77. T Rowe Price Equity Income (PRFDX)	A	Int./Div.			Sold	05/12/16	L		
78. T Rowe Price Group Inc (TROW)	D	Dividend	M	T	Donated (part)	08/01/16	K		
79. T Rowe Price MD Tax Free Bond (MDXBX)	D	Int./Div.	N	T					
80. T Rowe Price New Asia (PRASX)		None			Sold	01/22/16	K		
81. T Rowe Price Value (TRVLX)	C	Int./Div.	M	T					
82. Union Pacific Corp (UNP)	C	Dividend	M	T	Donated (part)	08/01/16	J		
83. Vanguard Emerging Markets (VWO)		None			Sold	01/04/16	M		
84. Vanguard FTSE Developed Markets (VEA)	C	Int./Div.	M	T	Buy	02/10/16	M		
85. Vanguard Hi Yield Tax-Exempt Admiral (VWALX)	D	Int./Div.	M	T					

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FINANCIAL DISCLOSURE REPORT

Page 9 of 12

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86. Vanguard High Yield Corporate Admiral (VWEAX) (IRA)	B	Int./Div.	K	T					
87. Vanguard Large Cap (VV)	B	Int./Div.	L	T	Buy	02/09/16	L		
88. Vanguard Total Intl Stock Index (VXUS)		None			Buy	01/22/16	L		
89.					Sold	02/09/16	L		
90. Vanguard Total Stock Market (VTI)		None			Sold	01/22/16	L		
91. Vanguard Value (VTV)		None			Buy	01/14/16	L		
92.					Sold	02/09/16	L		
93. Washington Real Estate (WRE)	C	Int./Div.	M	T					
94. Yum China Holdings Inc (YUMC)		None	K	T	Spinoff (from line 95)	11/01/16	K		
95. Yum! Brands Inc (YUM)	B	Dividend	L	T					
96. 529 - Portfolio 2027 (CUST)	A	Int./Div.	M	T					
97. 529 - Vanguard HY Bond (CUST)	A	Int./Div.	M	T	Buy (add'l)	03/01/16	K		
98. 529 - Portfolio 2030 (CUST)	A	Int./Div.	K	T					
99. 529 - Bond and Income Portfolio (CUST)	A	Int./Div.	M	T					
100. 529 - Vanguard Total International Stock Index Portfolio (CUST)	A	Int./Div.	J	T					
101. 529 - Vanguard Total Stock Market Index Portfolio (CUST)	A	Int./Div.	K	T					
102. -TRP Blue Chip Growth (TRBCX) (GST)	B	Int./Div.	N	T					

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103. -TRP Int Bond (RPIBX) (GST)	A	Int./Div.	K	T					
104. -TRP Int Stock (PRITX) (GST)	A	Int./Div.	K	T					
105. -TRP Equity Income (PRFDX) (GST)	D	Int./Div.	M	T					
106. -TRP Global Stock (PRGSX) (GST)	A	Int./Div.	M	T					
107. -TRP Growth Stock (PRGFX) (GST)	C	Int./Div.	M	T					
108. -TRP New Era (PRNEX) (GST)	A	Int./Div.	K	T					
109. -TRP Government Money (PRRXX) (GST) (formerly TRP Prime Reserve)	A	Int./Div.	M	T					
110. -TRP Spectrum Growth (PRSGX) (GST)	D	Int./Div.	M	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	

FINANCIAL DISCLOSURE REPORT

Page 11 of 12

Name of Person Reporting

Motz, Diana G.

Date of Report

5/10/2017

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

- Fidelity 500 Index Fund Premium (FUSVX), reported on line 13 of this report, changed names from Fidelity Spartan 500 Index Advantage (FUSVX), reported on line 31 of 2015 report.
- Fidelity Extended Market Index Fund Premium (FSEVX), reported on line 15 of this report, changed names from Fidelity Spartan Extended Market Index Adv (FSEVX), reported on line 35 of 2015 report.
- Holdings of Fidelity Municipal Money Market (FTEXX), reported on line 21 of this report, were transferred into Fidelity Treasury Fund (FZFXX), reported on line 22 of this report, on 2/11/16.
- TRP Government Money (PRRXX), reported on line 109 of this report, changed names from TRP Prime Reserve, reported on line 134 of 2015 report.

FINANCIAL DISCLOSURE REPORT

Page 12 of 12

Name of Person Reporting

Motz, Diana G.

Date of Report

5/10/2017

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/ Diana G. Motz**

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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