

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2014

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) Bohm, Jeffrey E.	2. Court or Organization U.S. Bankruptcy Court	3. Date of Report 05/15/2015
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Bankruptcy Judge - Active Status	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2014 to 12/31/2014
7. Chambers or Office Address 6202 Bob Casey Fed Courthouse 515 Rusk Street Houston, Texas 77002		
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.	Personal Representative	Estate #1 (see Part VIII)
2.	Trustee	Trust Account #2
3.	Trustee	Trust Account #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. 2014	Bloomberg, L.P. ageement to assist in writing bankruptcy treatise project.
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. 2014	Bloomberg, L.P. - bankruptcy treatise project (see Part VIII)	\$2,902.00
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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>
1. 2014	Employees Retirement System of Texas - Retirement
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. Southern District Of Texas	June 18 - 20, 2014	Corpus Christi, TX	Non-FJC educational seminar or program	meals, transportation, and lodging
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.)*

	<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.	Chase Southwest Airlines VISA	Credit Card	K
2.	Northwestern Whole Life Insurance Policy	Whole Life Insurance Policy Loan	L
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. University Federal Credit Union accounts	A	Interest	L	T					
2. Texas Health Credit Union accounts	A	Interest	J	T					
3. Wells Fargo Bank, N.A. accounts	A	Interest	N	T					
4. Bank of America, N.A. account		None	L	T					
5. JP Morgan Chase Bank, N.A. accounts	A	Interest	J	T					
6. Duke Energy Corp. common (DRIP Shares)	A	Dividend	J	T					
7. Glaxosmithkline PLC com (DRIP Shares)	A	Dividend	J	T					
8. Imation Corp. common		None			Sold	01/19/14	J		
9. Whole Foods Mkt Inc. common	A	Dividend	K	T					
10. T Rowe Price Growth Stock Fund	E	Dividend	M	T					
11. Dreyfus Liquid Assets Class 1		None	J	T					
12. IRA # 1 () (H)									
13. - University Federal Credit Union	A	Interest	J	T					
14. IRA # 2 () (H)									
15. - University Federal Credit Union	A	Interest	J	T					
16. IRA # 3 () (H)									
17. - New England Securities Daily Income Money Mkt Retail C1	A	Interest	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. - PIMCO Commodity Real Return Strategy Fund C1 D	A	Dividend	J	T	Buy (add'l)	09/24/14	J		
19. - Templeton Global Bond Fund Class A	A	Dividend	J	T					
20. - Davis New York Venture Class A	B	Dividend	J	T	Sold (part)	09/24/14	J	A	
21. - American Funds: The Growth Fund of America Class F-1	A	Dividend	J	T					
22. - Eagle Sm Cap Grwth Fd C1 A	A	Dividend	J	T					
23. - Perkins Mid Cap Value Fd Class T		None			Sold	09/24/14	J	A	
24. - Alger Midcap Growth Fund Class A		None	J	T					
25. - American Funds: Europacific Growth Fd Class F-1	A	Dividend	J	T					
26. - T Rowe Price Emerging Markets Stock (Fd)	A	Dividend	J	T	Buy (add'l)	09/24/14	J		
27. - Alpine Intl Real Estate Eq Fd C1 Y		None			Sold	09/24/14	J	A	
28. - Gabelli Ent Mgr & Acq Fd C1 A		None	J	T					
29. - Columbia Sel Smlr-CapVal Fd C1 A	A	Dividend	J	T					
30. - Mainstay ICAP Equity Fund C1 A	A	Dividend	J	T	Sold (part)	09/24/14	J	A	
31. - Invesco Intl Growth Fund C1 A	A	Dividend	J	T					
32. - Fidelity Advisor New Insights Fd C1 I	A	Dividend	J	T	Sold (part)	09/24/14	J	A	
33. - Ivy High Income Fd C1 A	A	Dividend	J	T					
34. - Gateway Fd C1 A	A	Dividend	J	T					

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35. - MFS Mid Cap Value Fund Class I	A	Dividend	J	T	Buy	09/24/14	J		
36. - Principal Global Real Estate SEC	A	Dividend	J	T	Buy	09/24/14	J		
37. IRA # 6 [REDACTED] (see part VIII) (H)									
38. - Ameriprise Insured Money Market	A	Interest	J	T					
39. - AIM Invesco Global Core Eq Cl A					Sold	03/24/14	K	B	
40. - AIM Invesco Real Estate Cl A	A	Dividend	K	T					
41. - Oppenheimer Funds:OPP Small &M/Cap Value - A	A	Dividend	J	T	Sold (part)	10/29/14	J	B	
42. - AIM Invesco Val Opps Cl A fka Invesco VK Val Opps - B	A	Dividend	J	T					
43. - MFS Family of Funds:MFS Utilities - Cl A (formerly Cl B)	B	Dividend	J	T					
44. - iShares Transportation Average ETF	A	Dividend	J	T	Buy	12/11/14	J		
45. - iShares U S Consumer Services ETF	A	Dividend	K	T	Buy	04/03/14	J		
46.					Buy (add'l)	05/15/14	J		
47. IRA # 7 [REDACTED] (H)									
48. - RVS Retirement Advisor Advantg 4 Var Ann		None	L	T					
49. 457 Deferred Compensation Plan at State of Texas	B	Dividend	K	T					
50. 401K at State of Texas	D	Dividend	O	T					
51. RiverSource Variable Univ Life Insurance Policy		None	L	T	Buy (add'l)	03/18/14	L		

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52.					Buy (add'l)	05/22/14	K		
53. Northwestern Whole Life Insurance Policy	C	Dividend	M	T					
54. Schulle, LLC (see part VIII)	B	Rent			Sold	03/17/14	O	G	Joseph P & Dane M Robson
55. Whirlpool Corp. common	A	Dividend	J	T					
56. IRA # 8 () (H)									
57. - Fidelity Large Cap Stock Fund	B	Dividend	K	T					
58. - Fidelity Select Biotechnology Fund	A	Dividend	K	T					
59. - Fidelity US Gov't Reserves	A	Dividend	J	T					
60. IRA # 9 () (H)									
61. - Fidelity Cash Reserves		None	J	T					
62. Pfizer Inc common	A	Dividend	J	T					
63. IRA #11 () (see part VIII)									
64. - New Eng Sec: Dreyfus Ins MMkt (fka Goldman Sachs Bk) see Part VIII	A	Interest			Distributed	03/19/14	L		
65. IRA # 12 () (H)									
66. - Invesco Developing Mkts Fd Cl A	A	Dividend	K	T	Buy (add'l)	03/19/14	J		
67.					Buy (add'l)	09/24/14	J		
68. - Invesco Intl Growth Fd Cl A	B	Dividend	K	T	Buy (add'l)	03/19/14	J		

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69. - Blackrock Equity Dividend Fund Cl A	D	Dividend	M	T	Buy (add'l)	03/19/14	J		
70. - Prudential High Yld Fd Inc Cl A	B	Dividend	K	T	Buy (add'l)	03/19/14	J		
71.					Buy (add'l)	09/24/14	J		
72. - Gabelli Enterprise Mergers & Acq Fund Cl A		None	K	T	Buy (add'l)	03/19/14	J		
73.					Buy (add'l)	09/24/14	J		
74. - Fidelity Advisor New Insights Fund Cl I	D	Dividend	M	T					
75. - Franklin/Templeton Hard Currency Fund Cl A		None	J	T	Buy (add'l)	03/19/14	J		
76.					Buy (add'l)	09/24/14	J		
77. - VOYA Global Real Estate Fund Cl A (fka ING Global Real Est)	A	Dividend	K	T					
78. - Perkins Mid Cap Value Fund Cl A		None			Buy (add'l)	03/19/14	J		
79.					Sold	09/24/14	K	C	
80. - PIMCO Commodity Real Return Strategy Fund Cl D	A	Dividend	J	T					
81. - PIMCO Total Return Fund Cl D	B	Dividend	K	T	Buy (add'l)	03/19/14	J		
82.					Buy (add'l)	09/24/14	J		
83. - Templeton Global Bond Fund Cl A	B	Dividend	K	T	Buy (add'l)	03/19/14	J		
84.					Buy (add'l)	09/24/14	J		
85. - Thornburg International Value Fund Cl A	A	Dividend			Buy (add'l)	03/19/14	J		

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86.					Sold	09/24/14	K	C	
87. - Invesco Sm Cap Val Fd Cl A	C	Dividend	K	T					
88. - Invesco Van Kampen Sm Cp Discovery Fd Cl A (fka Invesco)	C	Dividend	L	T					
89. - Doubleline Total Return Bd Fd Cl I	B	Dividend	K	T	Buy (add'l)	03/19/14	J		
90.					Buy (add'l)	09/24/14	J		
91. - MFS Emerging Markets Debt Fd Cl A	A	Dividend	K	T	Buy (add'l)	03/19/14	J		
92.					Buy (add'l)	09/24/14	J		
93. - Dreyfus Insured Deposits Premier (see Part VIII)	A	Interest	L	T	Buy (add'l)	03/20/14	L		
94. - Gateway Fund Cl A	A	Dividend	K	T	Buy (add'l)	03/19/14	J		
95.					Buy (add'l)	09/21/14	J		
96. - Meridian Growth Fund Legacy Class	C	Dividend	K	T					
97. - Columbia Mid Cap Value Fd Cl A	A	Dividend	J	T	Buy	09/24/14	J		
98. - MFS International Value Fd Cl I	A	Dividend	J	T	Buy	09/24/14	J		
99. - Nuveen Large Cap Value Fd Cl I	A	Dividend	J	T	Buy	09/24/14	J		
100. - Van Eck Global Hard Assets Fd Cl A	A	Dividend	J	T	Buy	03/19/14	J		
101.					Buy (add'l)	09/24/14	J		
102. Inland American Real Estate Trust	A	Dividend	J	T					

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103. Powell Mineral Trust - (see part VIII)	D	Royalty	K	W					
104. IRA #13 (H)									
105. - Community Natl Bank account	A	Interest	J	T					
106. - CNL Lifestyle Prop Inc: Chambers St Prop (REIT)	A	Dividend	K	T					
107. - FS Energy & Power Fund	B	Dividend	K	T					
108. Trust Acct # 2 - Trustee (H)									
109. - USAA Growth Fund		None			Sold	05/05/14	J	D	
110. - USAA Precious Metals & Minerals Fund		None			Sold	05/05/14	J		
111. - Trust #2 Brokerage Acct # (H)(X)(see part VIII)									
112. - - MSSB Cash Deposits - MMkt Funds (see part VIII)	A	Interest	J	T	Distributed (part)	07/10/14	L		
113.					Distributed (part)	07/18/14	K		
114.					Distributed (part)	12/31/14	M		
115. Trust Acct #3 - Trustee & Beneficiary (see part VIII) (H)									
116. - JPMorgan Chase Bank, N.A. Accounts	A	Interest	J	T	Distributed (part)	05/21/14	K		
117.					Distributed (part)	06/13/14	M		
118.					Distributed (part)	07/31/14	K		
119.					Distributed (part)	12/16/14	M		

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)
120.					Distributed (part)	12/22/14	L		
121. - Jackson Natl Life Ins Co Inc:Pers L - IRA Annuity #3	E	Int./Div.	N	T					
122. - Pacific Life IRA Annuity: Pacific Innov Sel - IRA Annty	D	Int./Div.	M	T					
123. T Rowe Price Intl Growth & Income Fd	A	Dividend	J	T					
124. Estate #1 - Personal Rep & Beneficiary (see part VIII) (H)									
125. - JPMorgan Chase Bank, N.A. account	A	Interest			Distributed (part)	05/16/14	M		
126.					Distributed	12/22/14	L		
127. - Mason National Bank Certificate of Deposit	A	Interest			Redeemed	05/16/14	M		
128. - Johnson City Bank Certificate of Deposit	A	Interest			Redeemed	05/02/14	M		
129. - U S Treasury	A	Interest							
130. Brokerage Account #1 () (H)									
131. - MFB Northern Fds Money Mkt Fd	A	Dividend	K	T					
132. - MFB Northern Fds Stk Index Fd	C	Dividend	M	T	Sold (part)	2/20/14	J	A	
133.					Buy (add'l)	10/17/14	J		
134.					Buy (add'l)	11/21/14	J		
135.					Sold (part)	12/22/14	J	A	
136. - MFB Northern Fds Small Cap Index Fd	A	Dividend	J	T	Sold (part)	02/20/14	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 = \$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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Bohm, Jeffrey E.

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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.					Buy (add'l)	10/17/14	J		
138.					Sold (part)	12/22/14	J	A	
139. - MFB Northern Intl Equity Index Fd	C	Dividend	L	T	Buy (add'l)	02/21/14	J		
140.					Sold (part)	10/16/14	J		
141.					Sold (part)	11/20/14	K	B	
142.					Buy (add'l)	11/21/14	J		
143.					Buy (add'l)	12/23/14	J		
144. - MFB Northern Fds Emerging Mkts Equity Index Fd	B	Dividend	K	T	Sold (part)	02/20/14	J		
145.					Sold (part)	10/16/14	J		
146.					Sold (part)	12/22/14	J		
147. - MFB Northern High Yield Fixed Income Fd	C	Dividend	L	T	Sold (part)	02/20/14	J		
148.					Buy (add'l)	10/17/14	J		
149.					Sold (part)	12/22/14	J		
150. - MFB Northern Fds Global Real Estate Index Fd	A	Dividend	K	T	Sold (part)	02/20/14	J		
151.					Sold (part)	10/16/14	J	A	
152.					Buy (add'l)	12/23/14	J		
153. - MFB Northern Fds Bd Index Fd	A	Dividend	L	T	Sold (part)	02/20/14	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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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)
154.					Buy (add'l)	10/17/14	J		
155.					Buy (add'l)	11/21/14	J		
156.					Buy (add'l)	12/23/14	J		
157. - MFB Northern Mid Cap Index Fd	B	Dividend	K	T	Sold (part)	02/20/14	J	A	
158.					Buy (add'l)	10/17/14	J		
159.					Buy (add'l)	11/21/14	J		
160.					Sold (part)	12/22/14	J	A	
161. - MFC Flexshs Tr Morningstar Gbl Upstream Natl Res Indx Fd	A	Dividend	K	T	Sold (part)	02/20/14	J		
162.					Buy (add'l)	10/21/14	J		
163.					Buy (add'l)	12/26/14	J		
164. - MFC Flexshares Tr Iboxx 3 Yr Target Duration Tips Indx Fd	A	Dividend	J	T	Sold (part)	02/20/14	J		
165.					Buy (add'l)	10/21/14	J		
166.					Buy (add'l)	12/26/14	J		
167. - MFB Northern Fds Ultra Short Fixed Income Fd	A	Dividend	J	T	Sold (part)	02/20/14	J		
168.					Sold (part)	10/16/14	J	A	
169. - MFC Flexshares Tr STOXX Global Broad Infrastructure Index Fd	A	Dividend	J	T	Buy	02/26/14	J		
170.					Sold (part)	10/16/14	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 = \$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)
171. Wayne SU Ret (fka Fidelity Inv: Freedom K2020) (see Part VIII)		None	K	T					
172. Brokerage Account #3 () (H)									
173. - Cash Deposits & Money Mkt Accts	A	Interest	J	T	Buy	07/31/14	K		
174. - American High Income Trust F2 (fka F1)	A	Dividend	J	T	Sold (part)	04/11/14	J	A	
175.					Buy (add'l)	08/01/14	J		
176.					Buy (add'l)	08/15/14	J		
177. - Artisan MidCap Value Inv	A	Dividend	J	T	Sold (part)	04/11/14	J	A	
178.					Buy (add'l)	08/01/14	J		
179.					Sold (part)	08/15/14	J	A	
180. - Cambiar Small Cap Inv	A	Dividend	J	T	Sold (part)	04/11/14	J	A	
181.					Buy (add'l)	08/01/14	J		
182.					Sold (part)	08/15/14	J	A	
183. - Harding Loevner Intl Eqty Inst Inv	A	Dividend	K	T	Buy (add'l)	04/11/14	J		
184.					Buy (add'l)	08/01/14	J		
185.					Sold (part)	08/15/14	J	A	
186. - Ivy Mid Cap Growth I (fka A)	A	Dividend	J	T	Sold (part)	04/11/14	J	A	
187.					Buy (add'l)	08/01/14	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 \$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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Bohm, Jeffrey E.

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05/15/2015

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)
188.					Sold (part)	08/15/14	J	A	
189. - Lazard Emerging Mkts Eq I	A	Dividend	J	T	Buy (add'l)	04/11/14	J		
190.					Buy (add'l)	08/01/14	J		
191.					Sold (part)	08/15/14	J		
192. - Harris Assoc Inv Tr: Oakmark Fund C1 I	A	Dividend	J	T	Buy (add'l)	04/11/14	J		
193.					Buy (add'l)	08/01/14	J		
194.					Sold (part)	08/15/14	J	A	
195. - Pimco Foreign Bd (Unhedged) P (fka A)	A	Dividend	J	T	Sold (part)	04/11/14	J	A	
196.					Buy (add'l)	08/01/14	J		
197.					Sold (part)	08/15/14	J	A	
198. - Prudential Jennison Growth Z (see Part VIII)	A	Dividend	K	T	Sold (part)	04/11/14	J	A	
199.					Buy (add'l)	08/01/14	J		
200.					Buy (add'l)	08/15/14	J		
201. - Baron Growth Institutional (fka Retail)	A	Dividend	J	T	Buy (add'l)	04/11/14	J		
202.					Buy (add'l)	08/01/14	J		
203.					Buy (add'l)	08/15/14	J		
204. - Blackrock Low Dur Bd Inst Inv (fka A)	A	Dividend	J	T	Buy (add'l)	04/11/14	J		

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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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)
205.					Buy (add'l)	08/01/14	J		
206.					Sold (part)	08/15/14	J		
207. - Lazard Develop Mkts Eq Inv (X) (see Part VIII)	A	Dividend	J		Buy (add'l)	04/11/14	J		
208.					Buy (add'l)	08/01/14	J		
209.					Sold (part)	08/15/14	J		
210. - PIMCO Total Return A (see Part VIII)	A	Dividend			Buy (add'l)	04/11/14	J		
211.					Buy (add'l)	08/01/14	J		
212.					Sold (part)	08/15/14	J	A	
213.					Sold	12/05/14	J		
214. - PIMCO Total Return D (see part VIII)	A	Dividend			Sold (part)	08/15/14	J	A	
215.					Sold	12/05/14	J		
216. - Prudential Jennison Growth A (see part VIII)					Sold (part)	04/11/14	J	A	
217.					Buy (add'l)	08/01/14	J		
218.					Buy (add'l)	08/15/14	J		
219.					Merged (with line 198)	11/24/14	J		
220. - PIMCO Total Return P (see Part VIII)	A	Dividend	J	T	Spinoff (from line 213)	12/05/14	J		
221. Lucie Rie Pottery (see part VIII)		None	K	W	Sold (part)	04/02/14	J	B	

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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VII. INVESTMENTS and TRUSTS – income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

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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)
222.					Sold (part)	05/07/14	J	D	
223. Brokerage Acct #4 () (H)									
224. - Ameriprise Insured Money Market	A	Interest	J	T	Open	03/25/14	L		
225. - T Rowe Proce Capital Appreciation Advisor CI	B	Dividend	K	T	Buy	04/04/14	K		
226. - IShares Transportation Avg ETF	A	Dividend	K	T	Buy	04/09/14	J		
227. - IShares U S Consumer Services ETF	A	Dividend	J	T	Buy	04/03/14	J		
228. - IShares U S Medical Devices ETF	A	Dividend	J	T	Buy	04/03/14	J		
229. - IShares U S Pharmaeituicals ETF	A	Dividend	K	T	Buy	04/03/14	J		
230. - SPDR Dow Jones Industrial Average ETF	A	Dividend	K	T	Buy	05/15/14	K		
231. - Sector Consumer Staples Select Sector SPDR ETF	A	Dividend	K	T	Buy	04/04/14	K		

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

- (1) Part I, page 1, line 1: This estate was closed in 2014 and all assets were distributed to trust #3, the beneficiary of the estate.
- (2) Part III, page 2, Sec. A, line 1: I received cash compensation of \$2,502 which was reflected in my Form 1099-MISC, and a Apple IPAD valued at \$400. Therefore, I am reporting income of \$2,902.
- (3) Part VII, page 6, line 37: IRA #4 and IRA #5 were closed in 2009. Thus, in this report, IRA #6 follows IRA #3.
- (4) Part VII, page 7, line 54: In January of 2006, [REDACTED] I conveyed rental property to Schulle, LLC, a company which [REDACTED] I formed for the purpose of owning this rental property. This real property, located in Austin, Travis County, Texas, was sold on 3/17/14.
- (5) Part VII, pages 7 and 9, line 63, 64, and 93: IRA #10 was closed in 2011. Thus, in this report, IRA #11 follows IRA #9. IRA #11 was held in a money market account. This IRA was closed on 3/19/14 and the funds were transferred to IRA #12.
- (6) Part VII, page 10, line 103: [REDACTED] is a beneficiary of the Powell Mineral Trust, a trust created by members [REDACTED] to hold oil and gas mineral interests. The trust still owns additional oil and gas and coal deposit mineral interests in Waynesburg, PA. A lease bonus paid in 2014 is reflected as rental income on the 2014 Schedule K-1, but is shown as royalty income on this report in accordance with the filing instructions.
- (7) Part VII, pages 10 and 11, lines 111 - 114, lines 115 - 120, and lines 124 - 128: Estate #1 was closed in 2014, and assets distributed to trust #3, the beneficiary of the estate. Trust #3 then distributed assets to its beneficiaries, trust #2 and two individual heirs. Trust #2 then distributed the funds it received from trust #3 to its individual beneficiary.
- (8) Part VII, page 14, line 171: I inherited [REDACTED] retirement account at Wayne State University. In prior years it has been reported as Fidelity K020, an asset within the retirement fund. The assets of the retirement fund are not specific managed funds, but instead are investment scenarios developed by the retirement administrator. Therefore, the account is reported only as the Wayne State University retirement account.
- (9) Part VII, page 15 and 16, lines 198 and 216: The Prudential Jennison Growth A was merged into the Prudential Jennison Growth Z on 12/5/14.
- (10) Part VII, page 16, line 207: Lazard Develop Mkts Eq Inv was inadvertently not listed on the 2014 report. The value of the fund at 12-31-13 was \$1290.
- (11) Part VII, page 16, lines 210 - 215 and 220: PIMCO Total Return A and PIMCO Total Return D were merged into a new fund, PIMCO Total Return P, on 12/5/14.
- (12) Part VII, page 16, line 221: Trust #3 distributed Lucie Rie pottery, a [REDACTED] to me in 2011. The pottery I sold in 2014 is listed on this report.

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Bohm, Jeffrey E.

Date of Report

05/15/2015

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/ Jeffrey E. Bohm

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
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544