

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) Bourgeois, Richard L.	2. Court or Organization Middle District of Louisiana, District Court	3. Date of Report 05/6/2015
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 01/01/2014 to 12/31/2014
7. Chambers or Office Address 777 Florida Street Suite 278 Baton Rouge, LA 70801		
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.		
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. 2014

Bienvenue, Bonnecaze, Foco, Viator and Holinga - Self Employed Attorney disbursements

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.)*

	<u>SOURCE</u>	<u>DESCRIPTION</u>	<u>VALUE</u>
1.	Louisiana State Bar Association	Judicial membership (dues, disciplinary board assessment, member privileges)	\$435.00
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.	American Gateway Bank	Mortgage on lot/land purchase, Baton Rouge, LA (Part VII, Line 67)	M
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. JP Morgan Chase Accounts	A	Interest	M	T					
2. LA Start Saving 529 Plan, Age Based Agressive Track Fund	A	Int./Div.	J	T					
3. LA Start Saving 529 Plan, Age Based Agressive Track Fund	A	Int./Div.	J	T					
4. BBFVH 401(k) and Profit Sharing Plan (H)									
5. - Agressive Growth Model (H)									
6. - Hancock Horizon Div Income	A	Int./Div.			Sold (part)	06/11/14	J		
7.					Sold	06/11/14	J		
8. - Hancock Horizon Govt Money Mkt	A	Int./Div.			Sold (part)	06/11/14	J		
9.					Sold	06/11/14	J		
10. - Hancock Horizon Quant Lng/Sht	A	Int./Div.			Sold (part)	06/11/14	J		
11.					Sold	06/11/14	J		
12. - Hancock Horizon Div Intl	A	Int./Div.			Sold (part)	06/11/14	J		
13.					Sold	06/11/14	J		
14. - Hancock Horizon Burken Sml Cap	A	Int./Div.			Sold (part)	06/11/14	J		
15.					Sold	06/11/14	J		
16. - Hancock Horizon Growth	A	Int./Div.			Sold (part)	06/11/14	J		
17.					Sold	06/11/14	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 H = \$5,001 - \$15,000	D = \$15,001 - \$50,000 E = \$50,001 - \$100,000
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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☐ 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				
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18. - Hancock Horizon Value	A	Int./Div.			Sold (part)	06/11/14	J		
19.					Sold	06/11/14	J		
20. - Hancock Horizon Core Bond	A	Int./Div.			Sold (part)	06/11/14	J		
21.					Sold	06/11/14	J		
22. - Templeton Global Total Return (X)	A	Int./Div.			Buy	04/03/14	J		
23.					Sold (part)	06/11/14	J		
24.					Sold	06/11/14	J		
25. - Vanguard 500 Index Fund Invest	C	Int./Div.	J	T	Buy (add'l)	06/11/14	J		
26.					Buy (add'l)	06/11/14	J		
27.					Buy (add'l)	07/02/14	J		
28.					Buy (add'l)	07/31/14	K		
29.					Buy (add'l)	08/05/14	J		
30.					Buy (add'l)	09/03/14	J		
31.					Buy (add'l)	10/03/14	J		
32.					Buy (add'l)	11/04/14	J		
33.					Buy (add'l)	11/28/14	J		
34. - Hancock Horizon Burkenroad Fnd	A	Int./Div.	J	T	Buy (add'l)	06/11/14	J		

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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	
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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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				
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35.					Buy (add'l)	06/11/14	J		
36.					Buy (add'l)	07/31/14	J		
37. TPBP Profit Sharing (H)									
38. - JPMorgan SmartRetirement 2045-Inst	C	Int./Div.			Sold	11/20/14	K		
39. TPBP Profit Sharing 401(k) (H)									
40. - JP Morgan SmartRetirement 2045-Inst	D	Int./Div.			Sold	11/20/14	L		
41. - S SgA S&P 500 Index NL-C	C	Int./Div.			Sold	11/20/14	K		
42. - Fidelity Spartan Extended Market Index-Inv	A	Int./Div.			Sold	11/20/14	J		
43. JP Morgan U.S. Govt Money Market Fund JIGXX	A	Int./Div.			Sold	12/02/14	J		
44. Amer. Fnd. Ltd Term Tx-Ex Bd A (LTEBX)	A	Int./Div.			Sold (part)	01/08/14	J		
45.					Sold (part)	01/08/14	J		
46.					Sold (part)	01/08/14	J		
47.					Sold	02/11/14	J		
48. Amer. Funds Short Term Bd Fund (ASBAX)	A	Int./Div.			Sold (part)	02/11/14	J		
49.					Sold (part)	02/11/14	J		
50.					Sold	02/11/14	J		
51. Amer. Amcap Fund (AMCPX)	A	Int./Div.	K	T	Buy (add'l)	01/08/14	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	
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(See Column C2)	Q = Appraisal	V = Other		W = Estimated	
	U = Book Value				

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52.					Buy (add'l)	01/08/14	K		
53.					Buy (add'l)	02/11/14	J		
54.					Sold (part)	04/24/14	K	B	
55. Amer. Funds Global Balanced (GBLAX)	A	Int./Div.	K	T	Buy (add'l)	01/08/14	J		
56.					Buy (add'l)	01/08/14	K		
57.					Buy (add'l)	02/11/14	J		
58.					Sold (part)	04/24/14	K	B	
59. Amer. Funds American Mutual A (AMRMX)	A	Int./Div.	K	T	Buy (add'l)	01/08/14	J		
60.					Buy (add'l)	01/08/14	K		
61.					Buy (add'l)	02/11/14	J		
62.					Sold (part)	04/24/14	K	B	
63. Amer. Funds Income Fund of America (AMECX)	A	Int./Div.			Sold	01/08/14	K	A	
64. Amer. Funds Capital Income Builder Fund (CAIBX)	A	Int./Div.			Sold	01/08/14	K	A	
65. Amer. Funds Euro-Pacific Growth (AEPGX)	A	Int./Div.			Sold	01/08/14	K	A	
66. Raymond James Bank Deposit Program (X)		None	J	T	Buy	12/03/14	J		
67. Lot/Land Purchase on May 30, 2014 for \$300,000, Baton Rouge, LA (X)		None	N	R	Buy	05/30/14	N		Stanford Oaks, LLC
68.									

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

Section VII, Line 67 - This was a real estate purchase that occurred on May 30, 2014. The purchase price of the property was \$300,000.

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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/ **Richard L. Bourgeois**

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