

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2018

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) Goldgar, A. Benjamin	2. Court or Organization Bankruptcy Court, N.D. Ill.	3. Date of Report 07/08/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) United States Bankruptcy Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☒ Amended Report	6. Reporting Period 01/01/2018 to 12/31/2018
7. Chambers or Office Address Suite 638 219 South Dearborn Street Chicago, IL 60604		
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.	Trustee	Family Trust No. 1
2.	Director	Federal Bar Association -- Chicago Chapter
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. _____

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.)*

SOURCE	DESCRIPTION	VALUE
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.)*

CREDITOR	DESCRIPTION	VALUE 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. Fidelity Government Cash Reserves Money Market Fund	A	Dividend	K	T	Sold (part)	01/26/18	J		
2.					Sold (part)	01/29/18	J		
3.					Sold (part)	02/21/18	J		
4.					Buy (add'l)	03/21/18	K		
5.					Sold (part)	04/18/18	J		
6.					Sold (part)	04/19/18	J		
7.					Sold (part)	04/25/18	J		
8.					Sold (part)	05/21/18	J		
9.					Sold (part)	05/23/18	J		
10.					Sold (part)	06/04/18	J		
11.					Sold (part)	06/19/18	J		
12.					Sold (part)	07/26/18	J		
13.					Sold (part)	08/09/18	J		
14.					Sold (part)	08/27/18	J		
15. IRA No. 1 (H)									
16. - Fidelity Strategic Advisors Small-Mid Cap Fund	B	Dividend	K	T	Buy (add'l)	04/12/18	J		
17.					Sold (part)	09/07/18	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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☐ 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.					Buy (add'l)	10/17/18	J		
19.					Sold (part)	12/14/18	J	A	
20.					Buy (add'l)	12/28/18	J		
21. - Fidelity Strategic Advisors Value Fund	C	Dividend	K	T	Sold (part)	04/12/18	J	A	
22.					Sold (part)	09/07/18	J	A	
23.					Buy (add'l)	12/28/18	J		
24. - Fidelity Strategic Advisors International Fund	C	Dividend	K	T	Sold (part)	01/18/18	J	B	
25.					Buy (add'l)	02/13/18	J		
26.					Sold (part)	04/12/18	J	A	
27.					Buy (add'l)	09/07/18	J		
28.					Buy (add'l)	12/14/18	J		
29. - Fidelity Strategic Advisors Core Income Fund	C	Dividend	M	T	Buy (add'l)	01/18/18	J		
30.					Sold (part)	02/13/18	J	A	
31.					Buy (add'l)	03/08/18	J		
32.					Sold (part)	04/04/18	J		
33.					Buy (add'l)	04/12/18	J		
34.					Buy (add'l)	06/28/18	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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35.					Buy (add'l)	09/07/18	J		
36.					Sold (part)	10/17/18	J	A	
37.					Sold (part)	12/28/18	J	A	
38. - Fidelity Strategic Advisors Core Fund	D	Dividend	L	T	Sold (part)	03/08/18	J	A	
39.					Buy (add'l)	04/04/18	J		
40.					Sold (part)	04/12/18	J	A	
41.					Sold (part)	06/28/18	J	B	
42.					Sold (part)	09/07/18	J	B	
43.					Buy (add'l)	12/14/18	J		
44. - Fidelity Strategic Advisors Growth Fund	C	Dividend	K	T	Sold (part)	03/08/18	J	A	
45.					Buy (add'l)	04/04/18	J		
46.					Sold (part)	04/12/18	J	A	
47.					Sold (part)	06/28/18	J	A	
48.					Sold (part)	09/07/18	J	A	
49.					Buy (add'l)	10/17/18	J		
50.					Buy (add'l)	12/28/18	J		
51. - Fidelity Strategic Advisors Emerging Markets	A	Dividend	J	T	Sold (part)	01/18/18	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	P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	L = \$50,001 - \$100,000 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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52.					Buy (add'l)	04/12/18	J		
53. - Fidelity Strategic Advisors Income Opportunity Fund	A	Dividend	J	T					
54. - FIMM Money Market Port Inst CL	A	Dividend	J	T	Buy (add'l)	12/14/18	J		
55. - Fidelity Strategic Advisors Short Duration Fund	A	Dividend	J	T	Sold (part)	10/17/18	J	A	
56. - Fidelity SAI US Large Cap Index	A	Dividend	J	T					
57. - Fidelity SAI International Index	A	Dividend	J	T	Buy (add'l)	06/28/18	J		
58. - Fidelity SAI Emerging Markets Index	A	Dividend	J	T	Buy (add'l)	09/07/18	J		
59.					Sold (part)	12/14/18	J	A	
60. - AQR Managed Futures Fund CL N		None	J	T					
61. - Eaton Vance GL Macro Absolute Return Adv I	A	Dividend	J	T					
62. - Pimco Commodity Real Return Inst	A	Dividend	J	T					
63. - AQR Multistrgy Alternative Class N		None	J	T					
64. IRA No. 2 (H)									
65. - Fidelity Strategic Advisors Small-Mid Cap Fund	B	Dividend	J	T	Buy (add'l)	10/17/18	J		
66. - Fidelity Strategic Advisors International Fund	B	Dividend	K	T					
67. - Fidelity Strategic Advisors Value Fund	B	Dividend	J	T					
68. - Fidelity Strategic Advisors Core Fund	B	Dividend	K	T	Sold (part)	06/28/18	J	A	

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69.					Sold (part)	09/03/18	J	A	
70.					Buy (add'l)	12/28/18	J		
71. - Fidelity Strategic Advisors Growth Fund	B	Dividend	J	T					
72. - Fidelity Strategic Advisors Emerging Markets	A	Dividend	J	T					
73. - Fidelity Strategic Advisors Core Income Fund	B	Dividend	K	T	Buy (add'l)	01/18/18	J		
74.					Sold (part)	02/13/18	J	A	
75.					Buy (add'l)	03/08/18	J		
76.					Sold (part)	04/04/18	J	A	
77.					Buy (add'l)	06/28/18	J		
78.					Buy (add'l)	09/07/18	J		
79.					Sold (part)	10/17/18	J		
80.					Sold (part)	12/28/18	J		
81. - Fidelity Strategic Advisors Income Opportunity Fund	A	Dividend	J	T					
82. - FIMM Money Market Port Inst CL	A	Dividend	J	T					
83. - Fidelity Strategic Advisors Short Duration Fund	A	Dividend	J	T					
84. - Fidelity SAI US Large Cap Index	A	Dividend	J	T					
85. -Fidelity SAI Emerging Markets Index	A	Dividend	J	T					

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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 \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
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86. - AQR Managed Futures Fund CL N		None	J	T					
87. - AQR Multistrategy Alternative Class N		None	J	T	Buy	02/13/18	J		
88. - Pimco Commodity Real Return Inst	A	Dividend	J	T					
89. - SAI International Index	A	Dividend	J	T					
90. - Eaton Vance GL Macro Absolute Retn Adv 1 (Y)									
91. IRA No. 3 (H)									
92. - Fidelity Strategic Advisors Small-Mid Cap Fund	D	Dividend	L	T	Sold (part)	03/08/18	J	B	
93.					Buy (add'l)	04/12/18	J		
94.					Sold (part)	09/07/18	J	B	
95.					Buy (add'l)	10/17/18	J		
96.					Sold (part)	12/14/18	J	B	
97.					Buy (add'l)	12/28/18	J		
98. - Fidelity Strategic Advisors International Fund	D	Dividend	M	T	Sold (part)	01/18/18	J	B	
99.					Buy (add'l)	02/13/18	J		
100.					Sold (part)	04/12/18	J	B	
101.					Sold (part)	06/28/18	J	A	
102.					Buy (add'l)	09/07/18	J		

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103.					Buy (add'l)	12/14/18	J		
104. - Fidelity Strategic Advisors Value Fund	D	Dividend	L	T	Sold (part)	01/18/18	J	B	
105.					Buy (add'l)	02/13/18	J		
106.					Sold (part)	04/12/18	J	A	
107.					Sold (part)	09/07/18	J	B	
108.					Buy (add'l)	12/28/18	J		
109. - Fidelity Strategic Advisors Core Fund	D	Dividend	M	T	Sold (part)	01/18/18	J	B	
110.					Buy (add'l)	02/13/18	J		
111.					Sold (part)	03/08/18	J	B	
112.					Buy (add'l)	04/04/18	J		
113.					Sold (part)	04/12/18	J	B	
114.					Sold (part)	06/28/18	J	B	
115.					Sold (part)	09/07/18	J	C	
116.					Buy (add'l)	12/14/18	J		
117.					Buy (add'l)	12/28/18	J		
118. - Fidelity Strategic Advisors Growth Fund	D	Dividend	L	T	Sold (part)	02/13/18	J	A	
119.					Sold (part)	03/08/18	J	B	

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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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	(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.					Buy (add'l)	04/04/18	J		
121.					Sold (part)	04/12/18	J	B	
122.					Sold (part)	06/28/18	J	B	
123.					Sold (part)	09/07/18	J	B	
124.					Buy (add'l)	10/17/18	J		
125.					Buy (add'l)	12/28/18	J		
126. - Fidelity Strategic Advisors Emerging Markets	A	Dividend	K	T	Sold (part)	02/13/18	J	A	
127.					Buy (add'l)	04/12/18	J		
128. - Fidelity Strategic Advisors Income Opportunity Fund	A	Dividend	J	T	Sold (part)	10/17/18	J		
129.					Sold (part)	12/14/18	J	B	
130. - Fidelity Strategic Advisors Core Income Fund	D	Dividend	N	T	Buy (add'l)	01/18/18	J		
131.					Sold (part)	02/13/18	J	A	
132.					Buy (add'l)	03/08/18	J		
133.					Sold (part)	04/04/18	J	A	
134.					Buy (add'l)	04/12/18	J		
135.					Buy (add'l)	06/28/18	J		
136.					Buy (add'l)	09/07/18	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)
137.					Sold (part)	10/17/18	J	A	
138.					Sold (part)	12/28/18	J	A	
139. - Fidelity Strategic Advisors Short Duration Fund	A	Dividend	K	T	Sold (part)	10/17/18	J	A	
140.					Sold (part)	12/14/18	J	A	
141. - Fidelity SAI US Large Cap Index	A	Dividend	K	T					
142. - Fidelity SAI Emerging Markets Index	A	Dividend	J	T	Buy (add'l)	09/07/18	J		
143.					Sold (part)	12/14/18	J	A	
144. - AQR Multi Strategy Alternative Class N		None	J	T	Buy (add'l)	02/13/18	J		
145. - AQR Managed Futures Fund CL N		None	J	T	Buy (add'l)	02/13/18	J		
146. - Pimco Commodity Real Return Inst	A	Dividend	J	T	Buy (add'l)	02/13/18	J		
147. - FIMM Government Portfolio: Intl Cl	A	Dividend	J	T	Buy (add'l)	01/18/18	J		
148.					Sold (part)	02/12/18	J		
149.					Buy (add'l)	02/13/18	J		
150.					Sold (part)	05/14/18	J		
151.					Sold (part)	09/24/18	J		
152.					Sold (part)	11/13/18	J		
153.					Buy (add'l)	12/14/18	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. - Fidelity SAI Int'l Index	A	Dividend	K	T	Buy (add'l)	06/28/18	J		
155.					Sold (part)	12/14/18	J	A	
156. - Eaton Vance GL Macro Absolute Rtn Adv I	A	Dividend	J	T					
157. 401(k) (H)									
158. - Vanguard Institutional Index Fund Plus	A	Dividend	K	T					
159. Adirondack Trust Co. stock	D	Dividend	N	T					
160. Bank of America Growth Money Market Savings	A	Interest	J	T					
161. Deferred Annuity (H)									
162. - Fidelity VIP Investment Grade Bond Fund		None	N	T					
163. - Fidelity VIP Strategic Income Fund		None	M	T					
164. IRA No. 4 (H)									
165. - Vanguard Total Bond Market Index Fund	E	Dividend	P1	T					
166. - Vanguard Total International Stock Index Fund	C	Dividend	M	T					
167. - Vanguard Total Stock Market Index Fund	E	Dividend	O	T					
168. - Vanguard Prime Money Market Fund	C	Dividend	M	T					
169. - Vanguard Target Retirement 2020	A	Dividend	J	T					
170. Family Trust No. 1 (H)									

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. - Fidelity Advisor Growth Opp CL 1	A	Dividend	J	T					
172. - Fidelity Diversified International	B	Dividend	K	T					
173. - Fidelity International Cap Appreciation Fund	A	Dividend	J	T					
174. - Causeway International Value Investor	A	Dividend	J	T	Buy (add'l)	12/18/18	J		
175. - Harbor Capital Appreciation Adm CL	A	Dividend	J	T					
176. - Oakmark Fund Investor CL	C	Dividend	K	T					
177. - Oakmark International Investor CL 1	A	Dividend	J	T	Buy (add'l)	10/18/18	J		
178.					Sold (part)	12/04/18	J		
179. - Hotchkiss & Wiley Midcap Value CL A	A	Dividend	J	T					
180. - Janus Henderson Enterprise T	B	Dividend	K	T					
181. - Lazard Emerging Markets Equity Open CL Shares	A	Dividend	J	T					
182. - MFS International Value Fund CL A	A	Dividend	J	T					
183. - MFS International Diversification FD A	A	Dividend	J	T					
184. - MSIF Frontier Markets Port CL 1	A	Dividend			Sold	09/06/18	J		
185. - Oppenheimer Dev Markets Class 1	A	Dividend	J	T					
186. - T Rowe Price International Discovery Fund 1 CL	A	Dividend	J	T					
187. - T Rowe Price Overseas Stock 1 CL	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 \$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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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. - T Rowe Price Emerging Markets Stock Fund I	A	Dividend	J	T	Buy	09/06/18	J		
189.					Buy (add'l)	10/18/18	J		
190.					Sold (part)	12/18/18	J		
191. - T Rowe Price International Stk I	A	Dividend	J	T	Sold (part)	01/09/18	J	A	
192.					Sold (part)	01/30/18	J	A	
193.					Sold (part)	03/20/18	J	A	
194. - Wasatch Frontier Emerging Small Cos.		None			Sold	01/30/18	J	A	
195. - Wells Fargo Special Midcap Adm (Y)									
196. - Fidelity Municipal Income	A	Dividend	K	T	Buy (add'l)	03/20/18	J		
197. - Fidelity Tax-free Bond	A	Dividend	K	T	Buy (add'l)	01/02/18	J		
198.					Buy (add'l)	01/09/18	J		
199.					Buy (add'l)	01/30/18	J		
200.					Sold (part)	03/20/18	J		
201.					Sold (part)	10/18/18	J		
202. - Strategic Adv Tax Sensitive Short Duration	A	Dividend	L	T	Buy	01/09/18	L		
203.					Buy (add'l)	01/30/18	J		
204.					Sold (part)	03/20/18	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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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.					Sold (part)	12/18/18	J		
206. - Western Asset Managed Muni CL A	A	Dividend	L	T	Buy	10/18/18	K		
207.					Buy (add'l)	12/18/18	J		
208. - Vanguard Long Term Tax Exempt Admiral	A	Dividend	J	T	Buy	03/20/18	J		
209.					Buy (add'l)	07/18/18	J		
210.					Buy (add'l)	09/06/18	J		
211.					Sold (part)	10/18/18	J		
212. - Fidelity Limited Term Muni Income FD	A	Dividend			Sold (part)	01/02/18	J		
213.					Sold	01/09/18	J	A	
214. - DWS Managed Muni Bond FD S (see note)	A	Dividend	K	T	Buy (add'l)	01/02/18	J		
215.					Buy (add'l)	01/09/18	J		
216.					Buy (add'l)	01/30/18	J		
217.					Sold (part)	03/20/18	K		
218.					Sold (part)	10/18/18	K		
219. - Oppenheimer International Bond Fund CL I	A	Dividend	J	T	Buy (add'l)	09/06/18	J		
220.					Sold (part)	12/18/18	J	A	
221. - T Rowe Price Tax Free High Yield Adv	A	Dividend	K	T	Buy (add'l)	01/30/18	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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	(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)	10/18/18	J		
223. - T Rowe Price Tax Free Income Adv CL	A	Dividend	K	T					
224. - Templeton Global Bond Class A	A	Dividend	J	T	Buy (add'l)	01/16/18	J		
225.					Sold (part)	07/18/18	J		
226.					Sold (part)	09/06/18	J		
227.					Buy (add'l)	12/18/18	J		
228. - Wells Fargo Ultra Sht Muni Inc Adm	A	Dividend			Sold	01/09/18	K		
229. - Fidelity Govt Cash Reserves	A	Dividend	J	T					
230. - iShares S&P 100 ETF	A	Dividend	K	T					
231. - iShares MSCI EAFE ETF	A	Dividend	J	T	Buy	09/07/18	J		
232.					Sold (part)	10/19/18	J		
233.					Buy (add'l)	12/19/18	J		
234. - iShares TR Russell Midcap ETF	A	Dividend	J	T					
235. - iShares Russell 1000 Value ETF	A	Dividend	J	T	Sold (part)	01/31/18	J	A	
236.					Sold (part)	03/21/18	J	B	
237.					Buy (add'l)	12/19/18	J		
238. - iShares Russell 1000 Growth ETF	A	Dividend	K	T	Sold (part)	01/10/18	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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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)

239.					Sold (part)	01/31/18	J	A	
240.					Sold (part)	03/21/18	J	B	
241. - iShares Russell 1000 ETF	A	Dividend	K	T	Sold (part)	01/10/18	J	A	
242.					Sold (part)	01/31/18	J	A	
243.					Sold (part)	03/21/18	J	B	
244. - iShares Russell 2000 ETF	A	Dividend	J	T					
245. - iShares S&P Small Cap 600 Value	A	Dividend	J	T					
246. - iShares TR S&P Small Cap 600 Growth ETF (Y)	A	Dividend	J	T	Sold (part)	03/21/18	J	B	
247. - iShares Inc Core MSCI Emerging Markets	A	Dividend	J	T	Sold (part)	03/21/18	J	A	
248. - Vanguard Index FDS Vanguard Value	A	Dividend	K	T					
249. - Spdr Series Trust Bloomberg BRC CNVRT	A	Dividend	J	T	Sold (part)	01/10/18	J	B	
250. - Mainstay Mackay Tax Free Bond Class A (see note)	A	Dividend	J	T					
251. - FIMM Government Cash Reserves	A	Dividend			Sold	01/08/18	K		
252. - Spdr Index Shs FDS S&P Global NAT RES	A	Dividend	J	T					
253. - Flexshares Trust Morningstar Global Upstream NAT RES IDX	A	Dividend	J	T	Buy	12/19/18	J		
254. Family Trust No. 2 (H)									
255. - Fidelity Diversified International	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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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)

256. - Fidelity International Cap Appreciation Fund	A	Dividend	J	T					
257. - Fidelity Value Discovery		None	J	T	Buy	12/26/18	J		
258. - Causeway International Value Investor	A	Dividend	J	T					
259. - Harbor Capital Appreciation Adm CL	A	Dividend	J	T					
260. - Oakmark Fund Investor Class	B	Dividend	J	T					
261. - Oakmark International CL 1 (Y)									
262. - Hotchkiss & Wiley Midcap Value CL A	A	Dividend	J	T					
263. - Janus Henderson Enterprise T	A	Dividend	J	T					
264. - Lazard Emerging Markets Equity Open CL Shares	A	Dividend	J	T					
265. - MFS International Value Fund CL A	A	Dividend	J	T					
266. - MFS International Diversification FD A	A	Dividend	J	T					
267. - T Rowe Price New Era		None	J	T	Buy	12/26/18	J		
268. - T Rowe Price Overseas Stock 1 CL (Y)									
269. - T Rowe Price International Stk 1	A	Dividend	J	T					
270. - Wasatch Frontier Emerging Small Cos.		None			Sold	09/06/18	J		
271. - Wells Fargo Special Midcap Adm		None			Sold	08/31/18	J	A	
272. - Fidelity Municipal Income	A	Dividend	J	T	Buy (add'l)	03/15/18	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)

273.					Sold (part)	11/02/18	J		
274. - Fidelity Tax-free Bond	A	Dividend	K	T	Buy (add'l)	01/18/18	J		
275.					Sold (part)	03/15/18	J		
276. - Fidelity Limited Term Muni Income FD	A	Dividend			Sold	01/18/18	J	A	
277. - Strategic Adv Tax Sensitive Short Duration	A	Dividend	K	T	Buy	01/18/18	K		
278.					Sold (part)	11/02/18	J		
279.					Sold (part)	12/26/18	J		
280. - Blackrock National Muni Fund CL A	A	Dividend	J	T	Buy	11/02/18	J		
281. - Mainstay Mackay High Yield Muni Bd CL A	A	Dividend	J	T	Buy	10/02/18	J		
282. - Templeton Global Bond Class A	A	Dividend	J	T	Buy	01/18/18	J		
283.					Sold (part)	08/31/18	J		
284.					Buy (add'l)	10/02/18	J		
285. - Wells Fargo Muni Bond FD - Admin CL	A	Distribution	J	T	Buy	11/02/18	J		
286. - DWS Managed Muni Bond FD S (see note)	A	Dividend	J	T	Buy (add'l)	01/18/18	J		
287.					Sold (part)	03/15/18	J		
288.					Sold (part)	10/02/18	J		
289.					Sold (part)	11/02/18	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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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)
290. - Franklin Federal Tax Free Class A	A	Dividend	K	T	Buy (add'l)	03/15/18	J		
291.					Buy (add'l)	10/02/18	J		
292.					Sold (part)	11/02/18	J		
293.					Sold (part)	12/26/18	J	A	
294. - Oppenheimer International Bond Fund CL	A	Dividend	J	T	Buy (add'l)	08/31/18	J		
295.					Sold (part)	10/02/18	J	A	
296. - T Rowe Price Tax Free High Yield Adv	A	Dividend	J	T	Sold (part)	10/02/18	J		
297.					Sold (part)	11/02/18	J		
298. - T Rowe Price Tax Free Income Adv CL	A	Dividend	K	T					
299. - Wells Fargo Ultra Sht Muni Inc Adm	A	Dividend			Sold	01/18/18	K		
300. - Fidelity Govt Cash Reserves	A	Dividend	J	T					
301. - Flexshares Trust Morningstar Global	A	Dividend	J	T					
302. - iShares S&P 100 ETF	A	Dividend	J	T					
303. - iShares TR Russell Midcap ETF	A	Dividend	J	T					
304. - iShares Russell 1000 Value ETF	A	Dividend			Sold (part)	01/19/18	J	A	
305.					Sold	09/04/18	J	A	
306. - iShares Russell 1000 Growth ETF	A	Dividend	K	T	Sold (part)	01/19/18	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 \$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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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)
307. - iShares Russell 1000 ETF	A	Dividend	J	T					
308. - iShares Russell 2000 ETF	A	Dividend	J	T					
309. - iShares S&P Small Cap 600 Value	A	Dividend	J	T					
310. - iShares TR S&P Small Cap 600 Growth ETF (Y)									
311. - iShares Edge MSCI USA Value Factor ETF		None	J	T	Buy	12/27/18	J		
312. - iShares MSCI EAFE ETF	A	Dividend			Buy	11/05/18	J		
313.					Sold	12/27/18	J		
314. - iShares Trust Core MSCI EAFE ETF		None	J	T	Buy	12/27/18	J		
315. - iShares TR EAFE Small Cap ETF		None			Sold	01/19/18	J	A	
316. - iShares Inc Core MSCI Emerging Markets	A	Dividend	J	T					
317. - Sector Spdr Tr Shares Ben Int Financial	A	Dividend	J	T					
318. - Vanguard Index FDS Vanguard Value	A	Dividend	K	T					
319. - Spdr Series Trust Bloomberg BRC CNVRT		None			Sold	01/19/18	J	B	
320. - Mainstay Mackay Tax Free Bond Class A (see note)	A	Dividend	J	T					
321. - FIMM Government Portfolio: Instl CL	A	Dividend			Sold	01/17/18	J		
322. Inherited IRA No. 1 (H)									
323. - T. Rowe Price Dividend Growth	A	Dividend	K	T	Redeemed (part)	12/03/18	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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Goldgar, A. Benjamin

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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)

324. - T. Rowe Price Spectrum Income	A	Dividend	K	T	Redeemed (part)	12/03/18	J		
325. Inherited IRA No. 2 (H)									
326. - TIAA Traditional (see note)	C	Interest	L	T	Sold (part)	02/20/18	J		
327.					Sold (part)	08/20/18	J		
328. - CREF Stock (see note)			N	T	Sold (part)	02/20/18	J		
329.					Sold (part)	08/20/18	J		
330. - CREF Global Equities (see note)			K	T	Sold (part)	02/20/18	J		
331.					Sold (part)	08/20/18	J		
332. - TIAA Real Estate (see note)			K	T	Sold (part)	02/20/18	J		
333.					Sold (part)	08/20/18	J		
334. - CREF Bond Market (see note)			K	T	Sold (part)	02/20/18	J		
335.					Sold (part)	08/20/18	J		
336. - CREF Inflation Linked Bond (see note)			K	T	Sold (part)	02/20/18	J		
337.					Sold (part)	08/20/18	J		
338. Bank of America checking (cash equivalent)	A	Interest	J	T					
339. Bank of America checking (cash equivalent) (4)	A	Interest	J	T					
340. Bank of America checking (cash equivalent) (2) (Y)									

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
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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)
341. Bank of America checking (cash equivalent) (2) (Y)									

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
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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.)*

Line 136 (on last year's form) listed an investment in Eaton Vance Global Macro Absolute RT CL 1 and a transaction on 10/25/17 as "Sold (part)." That was an error. The transaction should have been listed as "Sold." The rest of the information was correct. Because the investment was sold, it does not appear on line 146 (the equivalent line) on this year's form.

Lines 214, 286. The name of this fund changed during 2018. On last year's report, the fund appeared on line 197 as Deutsche Managed Muni Bond Fd S.

Line 250, 320. The name of this fund changed during 2018. On last year's report, the fund appeared on line 227 as Mainstay Tax Free Bond Class A.

Lines 326-37. This is an inherited IRA. Except for line 294, Column B is not completed because it cannot be. The TIAA-CREF statements disclose no information about income (other than for the "TIAA Traditional" fund), and TIAA-CREF personnel have told me that the information is unavailable because the investments are "annuity-based." Similarly, information about gain or loss from "sales" (the distributions I am required to take) is not reported in Column D for any portion of the IRA because TIAA-CREF personnel have told me that information about gains or losses is unavailable.

Lines 340-41. My [REDACTED] was a joint holder of these accounts with a former [REDACTED]. During 2018, [REDACTED] removed her name from the account and ceased to be a joint account holder.

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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/ **A. Benjamin Goldgar**

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