

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) Jackson, Jr., Stephen B.	2. Court or Organization United States District Court, Southern District of Iowa	3. Date of Report 04/23/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) United States Magistrate Judge (full-time)	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 United States Courthouse 131 E. 4th Street Davenport, IA 52801		
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.)

POSITION

NAME OF ORGANIZATION/ENTITY

1.		
2.		
3.		
4.		
5.		

II. AGREEMENTS. (Reporting individual only; see pp. 14-16 of filing instructions.)

☐ NONE (No reportable agreements.)

DATE

PARTIES AND TERMS

1. 2010	State of Iowa Judicial Retirement System, defined benefit pension, no control
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.		
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. 2018	Self-employed professional organizer
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. University of Notre Dame Law School	February 2-4, 2018	Notre Dame, IN	Trial Advocacy Teaching	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.	U.S. Bank	Mortgage on vacation/rental property, [REDACTED] (Part VII., Line 1)	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. Vacation/rental property, [REDACTED] [REDACTED] (2013 \$217,000)	E	Rent	M	R					
2. U.S. Bank Accounts	A	Interest	K	T					
3. IRA #1 (H)									
4. - AQR Managed Futures Strategy	A	Dividend			Sold	02/21/18	J	A	
5. - DFA Investment Grade	A	Dividend			Sold	07/23/18	J		
6. - DFA International Vector Equity	A	Dividend			Sold	07/23/18	J	A	
7. - DFA International Value	A	Dividend			Sold	07/23/18	J		
8. - DFA Emerging Markets Core Equity	A	Dividend			Sold	07/23/18	K	C	
9. - DFA Emerging Markets Small Cap	A	Dividend			Sold	07/23/18	J	B	
10. - DFA Global Fixed Income	A	Dividend			Sold	07/23/18	J		
11. - DFA International Core Equity	A	Dividend			Sold	07/23/18	K	B	
12. - DFA Short Term Extended Quality	A	Dividend			Sold	07/23/18	J		
13. - DFA US Large Cap Growth	A	Dividend			Sold	07/23/18	K	D	
14. - DFA US Core Equity	A	Dividend			Sold	07/23/18	K	D	
15. - DFA One-Year Fixed Income	A	Dividend			Sold	07/23/18	J		
16. - DFA US Targeted Value	B	Dividend			Sold	07/23/18	K	D	
17. - DFA Two-Year Global Fixed Income	A	Dividend			Sold	07/23/18	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	
3. Value Method Codes	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
(See Column C2)	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
	U = Book Value	V = Other	W = Estimated		

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18. - Diamond Hill Long Short	A	Dividend			Sold	07/23/18	J	B	
19. - Permanent Portfolio	A	Dividend			Sold	07/23/18	J		
20. - Vanguard Reit Index	A	Dividend			Sold	07/23/18	J	A	
21. -iShares MSCI Equal Weighted ETF	A	Dividend	K	T	Buy	07/23/18	K		
22. -iShares US Treasury Bond ETF	A	Dividend	J	T	Buy	07/23/18	J		
23. -iShares Short Maturity Bond ETF	A	Dividend	K	T	Buy	07/23/18	K		
24. -iShares MSCI USA Quality ETF	A	Dividend	K	T	Buy	07/23/18	K		
25. -iShares MSCI USA Value ETF	A	Dividend	K	T	Buy	07/23/18	K		
26. -iShares MSCI USA Momentum ETF	A	Dividend	K	T	Buy	07/23/18	K		
27. -iShares MSCI Emerging Markets ETF	A	Dividend	J	T	Buy	07/23/18	J		
28. -iShares Investment Grade Bond ETF	A	Dividend	K	T	Buy	07/23/18	K		
29. -iShares US Fixed Income ETF	A	Dividend	K	T	Buy	07/23/18	K		
30. -iShares JP Morgan Emerging Markets Bond ETF	A	Dividend	J	T	Buy	07/23/18	J		
31. -iShares MSCI International ETF	A	Dividend	K	T	Buy	07/23/18	K		
32. -iShares MSCI USA Small Cap	A	Dividend	J	T	Buy	07/23/18	J		
33. -FDIC Deposit Account - cash (X)	A	Dividend	J	T					
34. IRA #2 (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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35. - AQR Managed Future Strategy	A	Dividend			Sold	02/21/18	J	A	
36. - DFA Investment Grade	A	Dividend			Sold	07/16/18	J		
37. - DFA International Vector Equity	A	Dividend			Sold	07/16/18	J	A	
38. - DFA International Value	A	Dividend			Sold	07/16/18	J		
39. - DFA Emerging Markets Core Equity	A	Dividend			Sold	07/16/18	J	B	
40. - DFA Emerging Markets Small Cap	A	Dividend			Sold	07/16/18	J	A	
41. - DFA Global Fixed Income	A	Dividend			Sold	07/16/18	J		
42. - DFA International Core Equity	A	Dividend			Sold	07/16/18	J	A	
43. - DFA Short Term Extended Quality	A	Dividend			Sold	07/16/18	J		
44. - DFA US Large Cap Growth	A	Dividend			Sold	07/16/18	J	C	
45. - DFA US Core Equity	A	Dividend			Sold	07/16/18	K	D	
46. - DFA US Targeted Value	A	Dividend			Sold	07/16/18	K	C	
47. - DFA One-Year Fixed Income	A	Dividend			Sold	07/16/18	J		
48. - DFA Two-Year Global Fixed Income	A	Dividend			Sold	07/16/18	J		
49. - Diamond Hill Long Short	A	Dividend			Sold	07/16/18	J	A	
50. - Permanent Portfolio	A	Dividend			Sold	07/16/18	J		
51. - Vanguard Reit Index	A	Dividend			Sold	07/16/18	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 \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
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52. -iShares MSCI Equal Weighted ETF	A	Dividend	J	T	Buy	07/16/18	J		
53. -iShares US Treasury Bond ETF	A	Dividend	J	T	Buy	07/16/18	J		
54. -iShares Short Maturity Bond ETF	A	Dividend	K	T	Buy	07/16/18	K		
55. -iShares MSCI USA Quality ETF	A	Dividend	K	T	Buy	07/16/18	K		
56. -iShares MSCI USA Value ETF	A	Dividend	K	T	Buy	07/16/18	K		
57. -iShares MSCI USA Momentum ETF	A	Dividend	K	T	Buy	07/16/18	K		
58. -iShares MSCI Emerging Markets ETF	A	Dividend	J	T	Buy	07/16/18	J		
59. -iShares Investment Grade Bond ETF	A	Dividend	J	T	Buy	07/16/18	J		
60. -iShares US Fixed Income ETF	A	Dividend	J	T	Buy	07/16/18	J		
61. -iShares JP Morgan Emerging Markets Bond ETF	A	Dividend	J	T	Buy	07/16/18	J		
62. -iShares MSCI International ETF	A	Dividend	J	T	Buy	07/16/18	J		
63. -iShares MSCI USA Small Cap	A	Dividend	J	T	Buy	07/16/18	J		
64. FDIC Deposit Account - Cash (X)	A	Dividend	J	T					
65. IRA #3 (H)									
66. - Russell Lifepoints Fund Growth Strategy	A	Dividend			Sold	07/16/18	K	A	
67. -Spdr S&P 500	A	Dividend			Sold	07/16/18	J	C	
68. -DFA 2035 Target Date	A	Dividend			Sold	07/16/18	J	A	

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69. -iShares MSCI USA Equal Weighted ETF	A	Dividend	J	T	Buy	07/16/18	J		
70. -iShares Short Maturity Bond ETF	A	Dividend	J	T	Buy	07/16/18	J		
71. -iShares MSCI USA Quality ETF	A	Dividend	J	T	Buy	07/16/18	J		
72. -iShares MSCI USA Value ETF	A	Dividend	J	T	Buy	07/16/18	J		
73. -iShares MSCI USA Momentm ETF	A	Dividend	J	T	Buy	07/16/18	J		
74. -iShares MSCI Emerging Markets ETF	A	Dividend	J	T	Buy	07/16/18	J		
75. -iShares Investment Grade Bond ETF	A	Dividend	J	T	Buy	07/16/18	J		
76. -iShares MSCI International ETF	A	Dividend	J	T	Buy	07/16/18	J		
77. -iShares MSCI USA Small Cap ETF	A	Dividend	J	T	Buy	07/16/18	J		
78. TIAA CREF 457(b)(H)									
79. - TIAA CREF Lifecycle 2030	A	Dividend	J	T					
80. TIAA CREF 401(a)(H)									
81. - TIAA CREF S&P 500 Index	A	Dividend	J	T					
82. 529 Plan #1 (H)									
83. - BlackRock Aggressive Growth - C1	A	Dividend			Sold (part)	01/08/18	J	A	
84.					Sold	06/20/18	J	A	
85. -BlackRock Aggressive Growth -A	A	Dividend	J	T	Buy	06/20/18	J		

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86.					Sold (part)	08/30/18	J	A	
87.					Sold (part)	12/03/18	J	A	
88. -BlackRock College Enrollment-A	A	Dividend	J	T					
89. 529 Plan #2 (H)									
90. - Amcap Fund	A	Dividend			Sold	05/17/18	J	C	
91. - American Balanced Fund	A	Dividend			Sold	05/17/18	J	B	
92. - American High Income Trust	A	Dividend			Sold	05/17/18	J		
93. - Capital Income Builder	A	Dividend			Sold	05/17/18	J	A	
94. - Capital World Growth and Income	A	Dividend			Sold	05/17/18	J	A	
95. - Fundamental Investor	A	Dividend			Sold	05/17/18	J	B	
96. - Growth Fund of America	A	Dividend			Sold	05/17/18	J	C	
97. American Funds U.S. Gov't Money Market	A	Dividend	K	T	Buy	05/17/18	K		
98. 529 Plan #3 (H)									
99. - Ohio Tuition Trust Fifth Third Cash Account	A	Interest	K	T	Sold (part)	07/17/18	K		
100.					Sold (part)	12/06/18	K		
101. Trust #1 (Beneficiary) (H)									
102. - Lincoln Universal Life Insurance	B	Interest	K	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
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103. Trust #2 (Beneficiary) (H)									
104. - Transamerica Universal Life Insurance	C	Interest	M	T					
105. Investment Acct (H)									
106. - DFA Global, Alloc. 60/40	A	Dividend	J	T					
107. -iShares Russell 1000 ETF	A	Dividend	J	T	Buy	10/23/18	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	

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Jackson, Jr., Stephen B.

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

Section VII. Investments and Trusts. DFA is abbreviation for Dimensional Fund Advisors.

ETF is abbreviation for exchange traded funds.

MSCI is abbreviation for Morgan Stanley Composite Index.

On my report for last year (2017), Trust #1 closed. Therefore, on this report, the trust identified as Trust #1, was identified as Trust #2 on my 2017 report and the trust identified as Trust #2, was identified as Trust #3 on my 2017 report.

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Jackson, Jr., Stephen B.

Date of Report

04/23/2019

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/ Stephen B. Jackson, Jr.

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