

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) Oldshue, Jr., Jerry C.	2. Court or Organization Alabama Southern District Bankruptcy Court	3. Date of Report 05/15/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) 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 United States Bankruptcy Court 201 St. Louis Street Mobile, AL 36602-6602		
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.	
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.)*

DATE	SOURCE AND TYPE	INCOME (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.)*

DATE	SOURCE 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.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.	American Bankruptcy Institute Spring Meeting	April 19-22, 2018	Washington, D.C.	Bankruptcy CLE	Transportation, meals, and lodging
2.	Alabama State Bar Bankruptcy CLE	June 7-9, 2018	Destin, FL	Bankruptcy CLE	Transportation, meals, and lodging
3.	Northern District of Florida Bankruptcy Bar	September 27-28, 2018	Panama City, FL	Bankruptcy CLE	Transportation, meals, and lodging
4.	Cumberland Law School CLE	October 11-12, 2018	Birmingham, AL	Bankruptcy CLE	Transportation, meals, and lodging
5.	University of Alabama School of Law Bankruptcy CLE	November 15-16, 2018	Birmingham, AL	Bankruptcy CLE	Transportation, meals, and lodging

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6.	Mobile/Baldwin County Bench and Bar CLE	December 7-8, 2018	Fairhope, AL	Bankruptcy CLE	Transportation, meals, and lodging
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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.		
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. Synovus Bank account (Y)									
2. SmartBank Bank account (Y)									
3. IRA #1 (H)									
4. - ISHARES INC MSCI JAPAN RTF	A	Dividend	J	T					
5. - ISHARES JP MORGAN EM BOND ETF	A	Dividend	J	T					
6. - BLACKROCK EQUITY DIVIDEND	B	Dividend	J	T					
7. - BLACKROCK HI YIELD BD PTF INST	A	Dividend	J	T					
8. - BLACKSTONE ALT MULT-STRATINIST	A	Dividend	K	T					
9. - COLUMBIA SELECT LG CP GROWTH	B	Dividend	J	T					
10. - COLUMBIA SEL LARGE CAP VAL	A	Dividend	J	T					
11. - CONGRESS MID CAP GROWTH INSTL	A	Dividend	J	T					
12. - DIAMOND HILL LONG-SHORT	A	Dividend	J	T					
13. - HARDING LOEVNER EMERG MKTS ADV	A	Dividend	K	T					
14. - INVESCO GLB REAL ESTATE Y	A	Dividend	J	T					
15. - INVESCO INTL GROWTH	C	Dividend	K	T	Buy (add'l)	12/19/18	J		
16. - JANUS HENDERSON FLEXIBLE BOND	B	Dividend	K	T					
17. - JANUS HENDERSON INTL OPP I	C	Dividend	K	T	Buy (add'l)	12/24/18	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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	(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. - LOCORR MACRO STRATEGIES I	A	Dividend	J	T					
19. - LORD ABBETT SHT DURATION INC	A	Dividend	K	T					
20. - OPI STEELPATH MLP SELECT 40 Y	B	Dividend	J	T					
21. - PGIM JENNISON GROWTH Z	A	Dividend	J	T					
22. - PIMCO SHORT TERM	A	Dividend	J	T					
23. - VICTORY RS PARTNERS	A	Dividend	J	T					
24. - VICTORY RS SMALL CAP GROWTH	A	Dividend	J	T					
25. - VICTORY RS VALUE	A	Dividend	J	T					
26. - WILLIAM BLAIR INTL GROWTH	B	Dividend	K	T	Buy (add'l)	12/19/18	J		
27. 529 PLANS (H)									
28. - T ROWE PRICE US SMALL CAP GROWTH		None	J	T					
29. - AMER CENT EQ GW C 529		None	J	T	Distributed	9/27/18	J		
30.					Buy	10/11/18	J		
31. - PIMCO SHORT-TERM 529		None	J	T					
32. - NORTHERN BOND INDEX 529		None	J	T	Redeemed (part)	10/11/18	J	B	
33. - T. ROWE PRICE BALANCED 529		None	J	T					
34. - T. ROWE PRICE REAL ESTATE 529		None	J	T					

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35. - T. ROWE PRICE LARGE CAP GROWTH 529		None	K	T	Redeemed (part)	10/11/18	J	D	
36. - NORTHERN MID-CAP INDEX 529		None	J	T	Redeemed (part)	10/11/18	J	B	
37. - NORTHERN SMALL CAP INDEX 529		None	J	T					
38. - NORTHERN FUNDS INTERNATIONAL EQUITY INDEX 529		None	J	T	Distributed (part)	09/27/18	J		
39.					Buy (add'l)	10/11/18	J		
40.					Redeemed (part)	10/11/18	J	B	
41. - NEUBRGH INTL LGCP C 529		None	J	T	Distributed	09/27/18	J		
42.					Buy	10/11/18	J		
43. - LAZARD EMERGING MARKETS 529		None	J	T	Distributed (part)	09/27/18	J		
44.					Buy (add'l)	10/11/18	J		
45.					Redeemed (part)	10/11/18	J	B	
46. - CC 529 DFA US LARGE CAP VALUE		None	J	T	Buy	02/06/18	J		
47.					Distributed (part)	09/27/18	J		
48.					Buy (add'l)	10/11/18	J		
49.					Redeemed (part)	10/11/18	J	C	
50. - COHEN & STEERS DIVIDEND VALUE 529		None			Redeemed	02/06/18	J		
51. BROKERAGE ACCOUNT #1 (H)									

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52. - ALPHABET INC CLASS C		None	J	T					
53. - AMAZON COM INC		None	J	T					
54. - APPLE INC	A	Dividend	J	T					
55. - CONSTELLATION BRANDS INC COM CL A (Y)									
56. - MICROSOFT CORP	A	Dividend	J	T					
57. IRA #2 (H)									
58. - MORGAN STANLEY (Y)									
59. - AMER CENT EMERG MKTS I	A	Dividend	K	T	Buy	03/15/18	J		
60.					Buy (add'l)	09/21/18	J		
61. - BLACKROCK INFLAT PROT BOND I	A	Dividend	J	T	Sold (part)	03/13/18	J		
62. - CALAMOS MARKET NEUTRAL INC I	A	Dividend			Sold	03/13/18	J	A	
63. - COLUMBIA SEL LARGE CAP VAL I	A	Dividend	J	T					
64. - COLUMBIA SELECT LG CAP GROWTH I	B	Dividend	J	T					
65. - DIAMOND HILL LONG-SHORT I	A	Dividend	J	T					
66. - GUGGENHEIM TOTAL RETURN BD I	A	Dividend	J	T	Buy	03/15/18	J		
67. - HARBOR INTERNATIONAL INST	C	Dividend	J	T					
68. - INVESCO DEVELOPING MARKETS	A	Dividend	J	T	Sold (part)	03/13/18	K	D	

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69. - INVESCO DIVERSIFIED DIVIDEND	A	Dividend	J	T					
70. - INVESCO INTL GROWTH	B	Dividend	J	T	Sold (part)	03/13/18	K	C	
71. - INVESCO SMALL CAP VALUE	B	Dividend	J	T					
72. - JANUS HENDERSON ENTERPRISE I	A	Dividend	J	T	Buy (add'l)	03/15/18	J		
73.					Sold (part)	09/19/18	J	B	
74. - JANUS HENDERSON INTL MNG VOL I	A	Dividend	K	T	Buy	03/15/18	K		
75.					Buy (add'l)	09/21/18	J		
76. - JANUS HENDERSON INTL OPP I	C	Dividend	K	T					
77. - JANUS HENDERSON RESEARCH I	A	Dividend	J	T	Buy (add'l)	03/15/18	J		
78.					Sold (part)	09/19/18	J	B	
79. - JP MORGAN MID CAP VALUE I	A	Dividend	J	T	Buy	03/15/18	J		
80. - JP MORGAN SMALL CAP BLEND I	B	Dividend	J	T					
81. - LOCORR MACRO STRATEGIES I	A	Dividend	K	T	Sold (part)	03/13/18	J		
82.					Sold (part)	09/19/18	J		
83. - LORD ABBETT SHT DURATION INC F	A	Dividend			Sold	03/13/18	J		
84. - PGIM JENNISON GROWTH Z	A	Dividend	J	T					
85. - PIONEER MLTI AST ULT SHT INC Y	A	Dividend	J	T	Sold (part)	03/13/18	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
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86.					Buy (add'l)	09/21/18	J		
87. - VICTORY GLB NATURAL RES		None	J	T	Buy (add'l)	03/15/18	J		
88. - VICTORY RS VALUE	A	Dividend	J	T					
89. - VICTORY TRIVINT INTL SML CAP Y	A	Dividend	K	T	Buy	09/21/18	K		
90. - VIRTUS NWFLT MLTSEC SHTM BD I	A	Dividend	K	T	Buy	03/15/18	K		
91. - DREYFUS NEWTON INTL EQI		None			Sold	09/19/18	K	C	
92. BROKERAGE ACCOUNT #2 (H)									
93. - BLACKROCK GLOBAL ALLOCATION A	A	Dividend			Sold	12/17/18	J		
94. - BLACKROCK GLOBAL ALLOCATION C		None			Sold	12/17/18	J		
95. - MS PATHWAY INTERNATIONAL EQUITY		None	J	T	Buy	12/17/18	J		

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

Part VII, Line 1 - Synovus Bank balance fell below reporting threshold.

Part VII, Line 2 - Capstone Bank is now referred to as SmartBank. It is the same account. Reporting balance fell below reporting threshold.

Part VII, Line 21 - Prudential Jennison Growth is now listed as PGIM Jennison Growth Z. It is the same investment.

Part VII, Line 27 - Investment asset account 529 Plans only report market value, redemption and purchases (funds transferred from one asset in the plan to another), and withdrawals from the account (reported as distributions). They do not report income to the account, thus the column B(1) is left blank and "None" is entered in column B(2). Any other lines reporting no income means no income was earned on that investment during the year. Internal transfers between accounts do not report earnings on redemptions, while transfers within a single account do not report earnings. No gain or loss information is provided for withdrawals from the account (reported as distributions).

Part VII, Line 55 - Constellation stock market value fell below reporting threshold. No shares were sold.

Part VII, Line 58 - Morgan Stanley cash balance fell below the reporting threshold.

Part VII, Line 72 - Janus Henderson Enterprise was marked sold in prior year when it should have been marked sold (part).

Part VII, Line 80 - JP Morgan Dynamic Sm Op Gr Sel is now listed as JP Morgan Small Cap Blend I. It is the same investment.

Part VII, Line 84 - Prudential Jennison Growth is now listed as PGIM Jennison Growth Z. It is the same investment.

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