

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) Stampelos, Charles A.	2. Court or Organization U.S. District Court, Northern District of Florida	3. Date of Report 04/08/2019
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 01/01/2018 to 12/31/2018
7. Chambers or Office Address U.S. Courthouse 111 North Adams Street Tallahassee, Florida 32301-7717		
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. 2018	State of Florida Retirement - Health Insurance Subsidy (HIS)
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. 2018	State of Florida Retirement - HIS	\$1,009.80
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.				
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.			
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 (f/k/a Tallahassee State Bank) (cash accounts)	A	Interest	K	T					
2. Bank of America (cash accounts)	A	Interest	K	T					
3. Envision CreditUnion (cash account)	A	Interest	J	T					
4. Nationwide (St of Fl. Def.Comp.) NRS Fla. Fixed Fund #1	E	Interest	O	T					
5. TRowePrice (TRP) (IRA) #2 (H)									
6. -TRP Capital Appreciation		None			Sold	04/25/18	J	A	
7. - Sante Fe Gold Corp		None			Sold	04/30/18	J		
8. - ELOXX Pharm. Inc. Com ELOX		None	J	T					
9. - Mitek		None	L	T	Buy (add'l)	05/01/18	J		
10. - U.S. Treasury Money	A	Dividend	J	T	Buy	04/27/18	J		
11. - TSCXX					Buy	04/25/18	J		
12.					Sold	04/27/18	J		
13. Charles Schwab IRA Rollover #1 (H)			N	T					
14. Charles Schwab Reserves (SWSXX) (MM sweep)	A	Dividend	J	T	Sold (part)	01/02/18	J		
15.					Sold (part)	04/02/18	J		
16.					Buy (add'l)	04/30/18	J		
17.					Buy (add'l)	05/01/18	J		

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000 J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000 K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000 L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000 M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

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18.					Buy (add'l)	06/08/18	J		
19.					Sold (part)	07/02/18	J		
20.					Sold (part)	07/03/18	J		
21.					Buy (add'l)	07/16/18	J		
22.					Sold (part)	08/30/18	J		
23.					Buy (add'l)	09/04/18	J		
24.					Buy (add'l)	09/06/18	J		
25.					Buy (add'l)	09/14/18	J		
26.					Sold (part)	09/24/18	J		
27.					Buy (add'l)	09/27/18	J		
28.					Buy (add'l)	09/28/18	J		
29.					Sold (part)	10/01/18	J		
30.					Sold (part)	10/02/18	J		
31.					Buy (add'l)	10/09/18	J		
32.					Buy (add'l)	10/11/18	J		
33.					Buy (add'l)	11/01/18	J		
34.					Buy (add'l)	11/08/18	J		

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35.					Buy (add'l)	12/10/18	J		
36.					Buy (add'l)	12/14/18	J		
37.					Buy (add'l)	12/26/18	J		
38. Schwab Val. Adv. (SWVXX) (MM non-sweep)	D	Dividend	N	T	Buy	04/26/18	K		
39.					Sold (part)	07/12/18	K		
40.					Buy (add'l)	08/29/18	J		
41.					Sold (part)	09/20/18	J		
42.					Buy (add'l)	10/10/18	M		
43. US Bankcorp (USB)	A	Dividend			Sold	11/16/18	J	A	
44. Valero Energy Corp. (VLO)	A	Dividend			Sold	08/29/18	J	C	
45. Wheaton Precious Met F (WPM)	A	Dividend	J	T					
46. IShares Gold ETF (IAU)		None	J	T					
47. CVS Health Corp. (CVS)	A	Dividend	J	T	Buy	04/26/18	J		
48. SPDR Fund Consumer (XLY)	A	Dividend			Buy	07/12/18	J		
49.					Sold	10/09/18	J	A	
50. Technology Select Sector (XLK)	A	Dividend			Buy	07/12/18	J		
51.					Sold	10/09/18	J	A	

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52. Schwab Fundamental Emerging Mkts. (FNDE)		None			Buy	09/20/18	J		
53.					Sold	10/11/18	J		
54. Ishares US Preferred (PFF)	A	Dividend	K	T	Buy	09/20/18	K		
55. Lord Abbett Short Duration (LLDYX)	A	Dividend			Buy	06/18/18	K		
56.					Sold	10/09/18	K	A	
57. Vanguard FTSE Emerging (VWO)	A	Dividend			Buy	09/20/18	J		
58.					Sold	10/09/18	J		
59. Pimco Incm Inst C1 (PIMIX)	A	Dividend			Buy	06/20/18	K		
60.					Sold	10/07/18	K	A	
61. Schwab US Dividend (SCHD)	A	Dividend			Sold	11/16/18	K	C	
62. Lord Abbett Short Dur. (LALDX)	A	Dividend			Sold	06/18/18	K	A	
63. Vanguard Financials ETF (VFH)	A	Dividend			Buy	07/12/18	J		
64.					Sold	10/09/18	J	A	
65. Pimco Incm C1 D (PONDIX), merged w/ PONAX	A	Dividend			Sold	06/20/18	K		
66. Prudential High Yield (PHYZX)	B	Dividend			Sold	10/09/18	K	B	
67. Vanguard Short Term (VFSUX)	A	Dividend			Sold	04/26/18	K		
68. Schwab Fundamental Intl (SFNNX)	A	Dividend			Sold	11/16/18	J		

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69. Schwab Fundamental US (SFLNX)	A	Dividend			Sold	11/16/18	K	B	
70. Vanguard Interm Term (VFIDX)	A	Dividend			Sold	09/20/18	K		
71. Schwab Fund US Small Com ETF (FNDA)	A	Dividend			Buy	09/20/18	J		
72.					Sold	11/16/18	J		
73. ThomasPartners, Div of Charles Schwab #2 stocks only (H)									
74. MMM	A	Dividend	J	T	Buy	11/19/18	J		
75. T		None	J	T	Buy	11/19/18	J		
76. ABT		None	J	T	Buy	11/19/18	J		
77. ACN		None	J	T	Buy	11/19/18	J		
78. MO		None	J	T	Buy	11/19/18	J		
79. AAPL		None	J	T	Buy	11/19/18	J		
80. AJG	A	Dividend	J	T	Buy	11/19/18	J		
81. AMLP		None	J	T	Buy	11/19/18	J		
82. BBT		None	J	T	Buy	11/19/18	J		
83. BCE		None	J	T	Buy	11/19/18	J		
84. BDX	A	Dividend	J	T	Buy	11/19/18	J		
85. CVX		None	J	T	Buy	11/19/18	J		

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2. Value Codes (See Columns C1 and D3)					
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value				

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86. CSCO		None	J	T	Buy	11/19/18	J		
87. CL		None	J	T	Buy	11/19/18	J		
88. CVS		None	J	T	Buy	11/19/18	J		
89. DE		None	J	T	Buy	11/19/18	J		
90. DEO		None	J	T	Buy	11/19/18	J		
91. ES	A	Dividend	J	T	Buy	11/19/18	J		
92. XOM		None	J	T	Buy	11/19/18	J		
93. GPC		None	J	T	Buy	11/19/18	J		
94. IBM		None	J	T	Buy	11/19/18	J		
95. ITW		None	J	T	Buy	11/19/18	J		
96. INTC		None	J	T	Buy	11/19/18	J		
97. JPM		None	J	T	Buy	11/19/18	J		
98. JNJ	A	Dividend	J	T	Buy	11/19/18	J		
99. KMI		None	J	T	Buy	11/19/18	J		
100. LEG		None	J	T	Buy	11/19/18	J		
101. LMT	A	Dividend	J	T	Buy	11/19/18	J		
102. LOW		None	J	T	Buy	11/19/18	J		

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(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	
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103. MSFT		None	J	T	Buy	11/19/18	J		
104. NSRGF		None	J	T	Buy	11/19/18	J		
105. NVS		None	J	T	Buy	11/19/18	J		
106. OXY		None	J	T	Buy	11/19/18	J		
107. OMC		None	J	T	Buy	11/19/18	J		
108. ORCL		None	J	T	Buy	11/19/18	J		
109. PH		None	J	T	Buy	11/19/18	J		
110. PFE		None	J	T	Buy	11/19/18	J		
111. PM		None	J	T	Buy	11/19/18	J		
112. PPG		None	J	T	Buy	11/19/18	J		
113. PG		None	J	T	Buy	11/19/18	J		
114. RTN		None	J	T	Buy	11/19/18	J		
115. SBUX		None	J	T	Buy	11/19/18	J		
116. TXN		None	J	T	Buy	11/19/18	J		
117. TJX		None	J	T	Buy	11/19/18	J		
118. KO	A	Dividend	J	T	Buy	11/19/18	J		
119. UTX		None	J	T	Buy	11/19/18	J		

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Name of Person Reporting

Stampelos, Charles A.

Date of Report

04/08/2019

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. VZ		None	J	T	Buy	11/19/18	J		
121. VFC	A	Dividend	J	T	Buy	11/19/18	J		
122. WMT		None	J	T	Buy	11/19/18	J		
123. WSO		None	J	T	Buy	11/19/18	J		
124. WFC		None	J	T	Buy	11/19/18	J		
125. WMB	A	Dividend	J	T	Buy	11/19/18	J		
126.									
127.									
128.									
129.									
130.									
131.									
132.									
133.									
134.									

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	

Name of Person Reporting Stampelos, Charles A.	Date of Report 04/08/2019
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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

See section VII, 05/07/18 Report. The IRA with Charles Schwab noted on line 22 of the 2018 Report continued in 2018. In November 2018, a second IRA was created with ThomasPartners, a Division of Charles Schwab, when ThomasPartners purchased the stocks as noted in Part VII in lines 74-125.

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Name of Person Reporting

Stampelos, Charles A.

Date of Report

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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/ **Charles A. Stampelos**

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
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