

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2009

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) Matz, Howard A.	2. Court or Organization Central District of California	3. Date of Report 05/14/2010
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Judge - Active	5a. Report Type (check appropriate type) ☐ Nomination, Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2009 to 12/31/2009
7. Chambers or Office Address U.S. District Court 312 N. Spring St., Room 170 Los Angeles, CA 90012	8. On the basis of the information contained in this Report and any modifications pertaining thereto, it is, in my opinion, in compliance with applicable laws and regulations. Reviewing Officer _____ Date _____	

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. Sign on last page.

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. Co-Trustor and Co-Trustee	Trust
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.	

RECEIVED
200 MAY 17 PM 12 02
DISTRICT CLERK

Matz, Howard A.

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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.	
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. State Bar of California	November 12-13, 2009	Dana Point, California	Recipient of Award	Reimbursement for food and lodging, \$600.00
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 (I-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date Month - Day	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. TRUST NO. 3		D Dividend		O					
2. AllianceBernstein Tax Mged					Buy	1/5	J		
3. AllianceBernstein Tax Mged					Sold	1/8	J	A	
4. AllianceBernstein Tax Mged					Sold	1/30	J	A	
5. AllianceBernstein Tax Mged					Sold	2/27	J	B	
6. AllianceBernstein Tax Mged					Sold	3/31	J	D	
7. AllianceBernstein Tax Mged					Sold	4/7	J	A	
8. AllianceBernstein Tax Mged					Sold	4/30	J	A	
9. AllianceBernstein Tax Mged					Sold	5/29	J	A	
10. AllianceBernstein Tax Mged					Sold	6/30	J	A	
11. AllianceBernstein Tax Mged					Sold	7/13	J	A	
12. AllianceBernstein Tax Mged					Sold	7/31	J	A	
13. AllianceBernstein Tax Mged					Sold	8/31	J	A	
14. AllianceBernstein Tax Mged					Sold	9/4	L	E	
15. AllianceBernstein Tax Mged					Sold	10/21	J	A	
16. AllianceBernstein Tax Mged					Buy	12/22	J		
17. Bernstein California Municipal Portfolio					Sold	1/8	J	A	

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 R = Cost (Real Estate Only) V = Other	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 S = Assessment W = Estimated	D = \$5,001 - \$15,000 H2 = More than \$5,000,000 M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000 T = Cash Market	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)					
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value				

	(2)		(4)
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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	
3. Value Method Codes (See Column C2)					

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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 Month - Day	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
35. Alliance Bernstein Wealth Apprec					Buy	12/21	J		
36. TRUST ONE	D	Dividend	N	T					
37. Allianz Occ Opport.									
38. Artisan Intl. Fund									
39. AT&T					Sold	9/2	J		
40. Black Rock Equity Dividend Fund									
41. Comcast Corp					Sold	9/2	J		
42. Fidelity Advisor Mid Cap III					Sold	5/28	J	B	
43. Fidelity Floating Rate High Income					Buy	1/23	J		
44. Fidelity Floating Rate High Income					Sold	5/15	J	A	
45. General Electric									
46. Goldman Sachs Small Cap Value Institutional					Sold	6/18	J	A	
47. Harbor Capital Appreciation					Sold	2/18	J	A	
48. Harbor International Fund					Sold	7/1	J	A	
49. JP Morgan Mid. Cap Value									
50. Merger Fund									
51. Morgan Stanley Inst. Emerging Markets									

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52. Permanent Portfolio					Sold	1/22	J	A	
53. Permanent Portfolio					Sold	5/15	J	A	
54. Schwab Money Fund									
55. Selected American Shares									
56. SPDR S&P Int'l Small Cap					Sold	6/1	J	A	
57. Verizon Comm.									
58. Walt Disney Co.									
59. Fidelity Contra Fund					Buy	2/19	J		
60. TCW Total Return Bond Fund					Buy	5/18	K		
61. TCW Total Return Bond Fund					Sold	12/14	K	B	
62. Morgan Stanley Inst. Mid Cap Fund					Buy	5/29	J		
63. Oakmark International Small Cap Fund					Buy	6/3	J		
64. ICM Small Company Portfolio					Buy	6/19	J		
65. Dodge & Cox Intl. Stock Fund					Buy	7/2	J		
66. Forward Tactical Growth Inst.					Buy	12/15	J		
67. JP Morgan Strategic Income Fund					Buy	12/15	J		
68. IRA ROLLOVER	E	Dividend	P1	T					

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69. Allianz Occ Opport									
70. Artisan International									
71. Chesapeake Core Fund					Sold	2/19	L	A	
72. Dodge & Cox Intl. Stock Fund									
73. Dodge & Cox Stock Fund					Sold	2/2	L	A	
74. Fidelity Floating Rate High Income					Buy	1/23	K		
75. Fidelity Floating Rate High Income					Buy	4/29	K		
76. Fidelity Floating Rate High Income					Sold	5/22	L	D	
77. Fidelity Floating Rate High Income					Sold	6/29	K	B	
78. ICM Small Company Portfolio									
79. JP Morgan Mid-Cap Value Fund									
80. Merger Fund									
81. MS Inst. Emerging Markets									
82. MS Inst. Mid-Cap Growth									
83. Oakmark Intl. Small Cap Fund									
84. Permanent Portfolio					Sold	1/22	K	A	
85. Permanent Portfolio					Buy	4/29	K		

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86. Permanent Portfolio					Sold	5/19	L	A	
87. Selected American Shares									
88. Schwab Money Fund									
89. Black Rck Equity Dividend Fund					Buy	2/3	L		
90. Fidelity Contra Fund					Buy	2/20	L		
91. TCW Total Return Bond Fund					Buy	5/20	L		
92. TCW Total Return Bond Fund					Buy	5/26	L		
93. TCW Total Return Bond Fund					Buy	6/30	K		
94. TCW Total Return Bond Fund					Sold	12/14	M	D	
95. Forward Tactical Growth Inst. Fund					Buy	12/15	L		
96. JP Morgan Strategic Income Fund					Buy	12/15	L		
97. TRUST NO. TWO	E	Interest	O	T					
98. Oppenheimer M/M									
99. Whittier CA Bon									
100. Calif. St G/O Bond 2035									
101. Contra Costa LA Bond									
102. Hayward CA Bond					Redeemed	8/3	K	C	

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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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103. Calif. St G/O 2033									
104. CA Edl Fac Bond									
105. San Bernardino Bond									
106. Cal St G/O Bond 2015									
107. Torrance CA Bond									
108. Capistrano CA Bond									
109. South Tahoe					Buy	8/5	K		
110. Bonita Canyon CA Bond									
111. Cerritos CA Bond									
112. Willis CA Bond									
113. Cupertino CA Bond									
114. Calif. HPA (Purchase 2005)					Redeemed	12/1	K	A	
115. Calif. Stwde 5/75% (State Water Dev.)									
116. Calif. HFA 5.975%									
117. Bell Gardens 5%									
118. TRUST NO. 6	B	Interest	L	T					
119. TIAA-CREF	D	Interest	N	T					

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120. Israel Bonds	A	Interest	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	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
	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 (See Columns C1 and D3)	J = \$15,000 or less	K = \$15,001 - \$50,000	L = \$50,001 - \$100,000	M = \$100,001 - \$250,000	
	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 (See Column C2)	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
	U = Book Value	V = Other	W = Estimated		

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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part 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 _____

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 104)

FILING INSTRUCTIONS

Mail signed original and 3 additional copies to:

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544