

AO 10
Rev. 1/2010

**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) James, Robert G.	2. Court or Organization U.S. District Court, Louisiana	3. Date of Report 05/11/2010
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. Courthouse 201 Jackson Street, Suite 201 Monroe, LA 71201	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. Partner	James Real Estate
2. Member	Judd & Company, LLC
3. Member	James Minerals, LLC
4. Member	Whitten - James Real Estate, LLC
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. 2009	Louisiana State Employees Retirement System
2.	
3.	

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2009 MAY 17 P 1:16
U.S. DISTRICT COURT
MONROE, LA

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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. 2009	Louisiana State Employees Retirement System	\$34,939.00
2. 2009	James Minerals, LLC (partnership income)	\$1,761.00
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. 2009	Lincoln Parish District Attorney
2. 2009	State of Louisiana
3. 2009	James Minerals, LLC (partnership income)
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.				
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. Louise W. Tyler	 Shares Walmart	\$12,012.00
2. James E. Davison	See note in part VIII for description.	\$7,100.00
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. Community Trust Bank	Real Estate Loan	L
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. Timber Property, Vienna, La (Woodvale)		None	K	W					
2. Timber Property, Union Parish, La. (cabin)		None	K	W					
3. James Real Estate	F	Rent	N	W					
4.	A	Royalty							
5. Judd & Company, LLC (17.10%)	C	Royalty	M	W					
6. JP Morgan Chase, Accounts	A	Interest	J	T					
7. Undeveloped Property, Lincoln Parish, LA (1/3 int.) (Slaton)		None	J	W					
8. [REDACTED], Bienville Parish, La (1/3 int.) (Weyerhaeuser)		None	J	W					
9. Timber Property #1, Bienville Parish, La (1/3 int.) (Smelly)		None	K	W	Sold (part)	12/31/09	J	C	Ewing Timber
10. Timber Property #2, Bienville Parish, La (1/3 int.) (Neal)		None	K	W					
11. [REDACTED], Union Parish, LA (Middle Fork)		None	M	W					
12. Undeveloped property, Jackson Parish, LA (1/3 int.) (farm)		None	J	W					
13. IRA #3	A	Dividend	K	T					
14. -Fidelity Investments-Four-In-One Index									
15. Community Trust Bank, Accounts	C	Interest	K	T					
16. Jackson Parish, LA property (1/6 int) (Hutcheson)		None	J	W					
17. Jackson Parish, LA property (1/3 int) (Steele/Sherrard)	B	Rent	K	W	Sold (part)	12/31/09	J	A	Timber sale, Ewing Timber

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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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. Jackson Parish, LA property (1/3 int) (Steele Hard 40)	A	Rent	K	W	Sold (part)	12/31/09	J	A	Timber sale, Ewing Timber
19. Jackson Parish, LA property (1/3 int) (Goodwood)		None	J	W					
20. Bienville parish, LA property (1/3 int) (Gates)		None	J	W					
21. Union Parish, LA property (Franklin)		None	J	W					
22. Lincoln Parish, LA mineral interest (1/3 int)	D	Rent	J	W					
23. [REDACTED] (Goldsmith Estate)		None	J	W					
24. 1st National Bank, Account "X"		None	J	T					
25. Smith Barney - Brokerage Account									
26. -Wal Mart	A	Dividend	J	T	Buy	05/01/09	J		Gift from Louise W. Tyler
27.					Sold (part)	06/16/09	K	E	
28. Fidelity Investments - Brokerage Account #4									
29. -Cash	A	Interest	K	T					
30. -AFLAC Inc	A	Dividend	K	T	Sold (part)	03/03/09	J	A	
31. -Automatic Data Processing, Inc	A	Dividend	J	T	Sold (part)	03/05/09	J	A	
32. -Devon Energy	A	Dividend	J	T	Sold (part)	03/05/09	J	A	
33. -Diageo PLC	A	Dividend	J	T	Sold (part)	03/03/09	J	A	
34. -Encana Corp	A	Dividend			Sold	03/05/09	J	B	

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35. -Pepsico Inc	A	Dividend	J	T	Sold (part)	03/05/09	J	A	
36. -Air Products & Chem	A	Dividend	K	T	Buy	06/19/09	J		
37. -Intel Corp	A	Dividend	K	T	Buy	06/19/09	J		
38. -Ishares TR Russell Midcap Growth	A	Dividend	K	T	Buy	02/04/09	K		
39.					Buy (add'l)	06/19/09	J		
40.					Sold (part)	03/03/09	K	A	
41.					Sold (part)	09/18/09	J	B	
42. -Ishares TR Russell 2000 value index	A	Dividend	J	T	Buy	02/04/09	K		
43.					Sold	02/23/09	K	A	
44.					Buy	06/19/09	J		
45. -Ishares TR dow jones u s healthcare	A	Dividend	K	T	Buy	02/09/09	K		
46.					Sold	03/03/09	K	A	
47.					Buy	06/25/09	K		
48. -Microsoft Corp	A	Dividend	K	T	Buy	02/09/09	J		
49.					Sold	02/23/09	J	A	
50.					Buy	06/19/09	J		
51. -Nike Inc Class B	A	Dividend	K	T	Buy	06/19/09	J		

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52. -Schwab Charles Corp	A	Dividend	J	T	Buy	06/19/09	J		
53. -United Technologies Corp	A	Dividend	K	T	Buy	06/19/09	J		
54. -V F Corp	A	Dividend	K	T	Buy	06/19/09	J		
55. -Walgreen Company	A	Dividend	J	T	Buy	06/19/09	J		
56. -Waste Management Inc	A	Dividend	J	T	Buy	01/02/09	K		
57.					Sold	03/03/09	J	A	
58.					Buy	06/19/09	J		
59. -Waters Corp			J	T	Buy	06/19/09	J		
60. -Mathews Asian Growth & Income	A	Dividend	K	T	Buy	06/17/09	K		
61. Deferred Compensation - Wells Fargo Bank Tr	A	Dividend	K	T					
62. Timber property, Jackson Parish, LA (Nix)			K	W	Buy	05/05/09	K		Nix & Co., LLC
63.									

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

Part V, page 3, line 2 - For reporting person and [REDACTED] to visit Mr. Davison's vacation home in Mexico on two occasions including a portion of air travel between home and Mexico and back on one occasion, lodging, some meals and some transportation while in Mexico.

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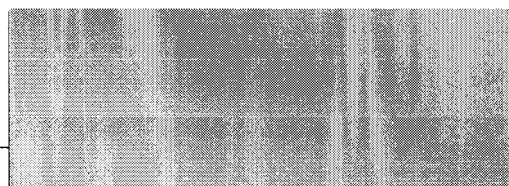
05/11/2010

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