

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) Lodge, Edward J.	2. Court or Organization DISTRICT COURT, Idaho	3. Date of Report 05/07/2010
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 550 West Fort Street Boise, ID 83724	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. Retired District Judge	State of Idaho
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. 1987	Retirement - State District Judge - 75% full pay
2.	
3.	

Lodge, Edward J.

FINANCIAL DISCLOSURE REPORT

Page 2 of 8

Name of Person Reporting

Lodge, Edward J.

Date of Report

05/07/2010

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	State of Idaho Retired District Judge	\$85,157.28
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. 2009	State Senator
2. 2009	Public Employer Retirement System of Idaho
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.				
2.				
3.				
4.				
5.				

FINANCIAL DISCLOSURE REPORT

Page 3 of 8

Name of Person Reporting

Lodge, Edward J.

Date of Report

05/07/2010

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.		

FINANCIAL DISCLOSURE REPORT

Page 4 of 8

Name of Person Reporting

Lodge, Edward J.

Date of Report

05/07/2010

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. Lodge [REDACTED] (Partnership) Dry Land Pasture Malheur County		None	N	W					
2. Ldge [REDACTED] (Partnership) US Bank-Checking Account	A	Interest	J	T					
3. Dry Pasture Canyon County, ID [REDACTED]		None	N	W					
4. Livestock [REDACTED] cows, [REDACTED] bulls, [REDACTED] heifers		None	K	W					
5. Cattle Sales		None			Sold	12/31/09	J	D	auction
6. HJ Hines	C	Dividend	M	T					
7. Key Bank Market Account	A	Interest	L	T					
8. Key Bank - [REDACTED]	A	Interest	K	T					
9. Windridge Farm 50% interest in land house, barn & vineyard		None	M	W					
10. Checking (sweep) Account Key Bank Caldwell, ID	A	Interest	K	T					
11. Property Canyon County		None	M	W					
12. Edward J. Lodge Key Bank Private Banking (sweep) Account	B	Interest	L	T					
13. Idaho Independent Bank	A	Interest	M	T					
14. Washington Mutual (purchased by Chase Bank)	A	Interest	L	T					
15. American Funds: Growth Fund of America Mutual Fund	A	Dividend			Sold	11/09/09	J	A	
16. Oppenheimer: Opp. Small Cap Mutual Fund	A	Dividend			Sold	11/09/09	J	A	
17. Security: Security Mid Cap Mutual Fund	A	Dividend			Sold	11/09/09	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	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)					

FINANCIAL DISCLOSURE REPORT

Page 5 of 8

Name of Person Reporting

Lodge, Edward J.

Date of Report

05/07/2010

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)
18. American Funds: Europacific Growth Mutual Fund	A	Dividend			Sold	11/09/09	J	A	
19. American Funds: Capital Income Builder Mutual Fund	A	Dividend	J	T					
20. Franklin Templeton: Franklin Income Mutual Fund	A	Dividend	J	T					
21. Chevron Stock	A	Dividend	J	T					
22. Sysco Stock	A	Dividend	J	T					
23. Del Monte Stock	A	Dividend	K	T					
24. Supervalu Stock	A	Dividend	J	T					
25. Franklin Templeton Mutual: Beacon Funds Mutual Fund	A	Dividend			Sold	11/09/09	J	A	
26. American Funds: Capital Income Builder Mutual Fund	B	Dividend	K	T					
27. Calamos: Calamos Strategic Mutual Fund	A	Dividend	J	T					
28. Franklin Templeton: Franklin Income Mutual Fund	B	Dividend	K	T					
29. American Funds: Income Fund of America Mutual Fund	A	Dividend	J	T	Sold (part)	12/09/09	J	A	
30. Black Rock Blackrock Equity Dividend	A	Dividend	J	T					
31. American Funds Capital World Growth and Income	A	Dividend	J	T					
32. Black Rock Blackrock Equity Dividend	A	Dividend			Sold	11/11/09	J	A	
33. Oppenheimer: Oppenheimer International Bond	A	Dividend	J	T					
34. Blackrock: Blackrock Global Allocation	A	Dividend	J	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
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

Page 6 of 8

Name of Person Reporting

Lodge, Edward J.

Date of Report

05/07/2010

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 J (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)
35. Stonegate Bank CD	A	Interest			Matured	03/09/09	L	A	
36. Stonegate Bank CD	A	Interest			Matured	04/09/09	L	A	
37. Cathay Bank CD	B	Interest			Matured	06/09/09	L	B	
38. D.A. Davidson Money Market	A	Interest	O	T					
39. Bank of North Carolina	A	Interest			Matured	06/09/09	L		see additional information
40. Cascade Bank Everett CD	A	Interest			Matured	07/09/09	L		see additional information
41. Wilmington Savings CD	A	Interest			Matured	07/09/09	K		see additional information
42. Oneida CO ID GO Bonds	A	Interest	K	T	Buy	06/09/09	K		
43. University of Id Rev. Bonds	A	Interest	K	T	Buy	04/09/09	K		
44. Blackrock Global Mutual Funds	A	Dividend	K	T	Buy	12/09/09	K		
45. Eaton Vance Global Macro Mutual Funds	C	Dividend	L	T	Buy	12/09/09	L		
46. 1-Shares Tips	A	Dividend	K	T	Buy	07/09/09	K		
47. Twin Falls - Cassia UTGO Ref. Bonds	A	Interest	K	T	Buy	09/09/09	K		
48. Blackrock: Blackrock Global Allocation	A	Dividend	K	T	Buy	11/09/09	K		

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 \$5,000,000	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

Page 7 of 8

Name of Person Reporting

Lodge, Edward J.

Date of Report

05/07/2010

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

Investments & Trusts:

Matured CD's went to money market which raised money market values.

Line 40 purchased on 04/17/09

Line 41 purchases on 04/03/09

Line 42 purchased on 04/03/09

FINANCIAL DISCLOSURE REPORT

Page 8 of 8

Name of Person Reporting

Lodge, Edward J.

Date of Report

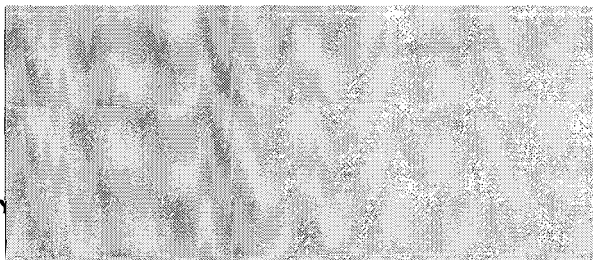
05/07/2010

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.

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILFULLY
AND CRIMINAL SANCTIONS (5 U.S.C. app. § 104)



T TO CIVIL

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