

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) Wolf, Mark L.	2. Court or Organization District of Massachusetts	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 1 Courthouse Way Suite 5110 Boston, MA 02210	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. Chairman Emeritus, Director	Albert Schweitzer Fellowship
2. Chair	John Wilham Ward Fellowship
3. Trustee	Personal Residence Trust
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.	

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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.	New York Patent Law Association	3/27-3/29	New York, NY	dinner of the federal judiciary	(Transportation, food, lodging)
2	Hofstra U Law School	10/18-10/19	Garden City, NY	presentation at symposium	(Transportation, food, lodging)
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.)*SOURCEDESCRIPTIONVALUE

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.)*CREDITORDESCRIPTIONVALUE CODE

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. Fidelity USA (MM)	C	Dividend	K	T					
2. Bank of America (Checking)	A	Interest	K	T					
3. Bank of America (Savings)	A	Interest	K	T					
4. Atlantic Whitehall GF (Mutual)		None			Sold	03/04/09	J		
5. AIM Liq Ass MM Fund (MM)	A	Interest			Sold	03/11/09	M		
6. AIM Liq Ass MM Fund (MM)	A	Interest			Sold	03/11/09	M		
7. Atlantic Whitehall Eq Inc. Fund		None			Sold	03/04/09	K		
8. Atlantic Whitehall Midcap Growth (Mutual)		None			Sold	03/04/09	J		
9. McDonalds (Stock)	A	Dividend	K	T					
10. Foxborough MA 5 25% 11/15/09	B	Int/Div.			Sold	11/15/09	K		
11. EMC Corp MA (Stock)		None			Sold	03/06/09	J		
12. Atlantic Whitehall Midcap Growth (Mutual)		None			Sold	03/04/09	J		
13. Atlantic Whitehall Growth Fund (Mutual)		None			Sold	03/04/09	J		
14. Neuberger Berman Genesis Fund		None			Sold	03/04/09	K		
15. LILLO, LLC (Limited Liability Corp.)	E	Dividend	M	W					
16. AIM Liq Ass (MM)	A	Interest			Sold	03/09/09	J		
17. AIM Liq Ass (MM)	A	Interest			Sold	03/11/09	J		

1. Income Gain Codes

(See Columns B1 and D4)

2. Value Codes

(See Columns C1 and D3)

3. Value Method Codes

(See Column L2)

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

Q = Appraisal

U = Book Value

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

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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)
18 AIM Liq Ass (MM)	A	Interest			Sold	03/11/09	M		
19. Citizens Bank (Savings and Checkings)	A	Interest	K	W					
20 Mass. Stat. Cons MBIASERD 5.5% (Bond 11/1/12)	B	Interest			Sold	3/12/09	K	A	
21 Boston MA GO 5% 8/1/13 (Bond)	A	Interest			Sold	3/12/09	K	A	
22. Brookline MA GO 5.125% (Bond)	A	Interest			Sold	04/01/09	K		
23. MA Wr Poll ABTMT 5 15% 8/1/09	B	Interest			Sold	8/1/09	K		
24 MBTA Sales Tax 5 25% 5/1/11 (Bond)	A	Interest			Sold	3/12/09	L	B	
25 MA Wr Res. Auth 5 25% 8/1/11 (Bond)	A	Interest			Sold	3/12/09	L	C	
26 Norwell, MA FGIC 5% 11/15/15	A	Interest			Sold	3/12/09	K	A	
27 Dodge & Cox Intl Stock Fund (Mutual)		None			Sold	03/04/09	J		
28 AIM Liq Ass. MM FUnd (MM)	A	Interest			Sold	03/02/09	L		
29 Dodge & Cox Int'l stock Fund (Mutual)		None			Sold	03/04/09	J		
30 AIM Liq. Ass MM FUnd (MM)	A	Interest			Sold	03/02/09	K		
31. Atlantic Whitehall Eq. Inc. (mutual)		None			Sold	03/04/09	L		
32 Managers Time Sq Midcap Growth (Mutual)		None			Sold	03/04/09	K		
33 Atlantic Whitehall Eq. Inc. (mutual)		None			Sold	03/04/09	K		
34 Managers Time Sq Midcap Growth (mutual)		None			Sold	03/04/09	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	
3 Value Method Codes (See Column C2)					

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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)
35. Lazard emerging Market Fund (mut)		None			Sold	03/04/09	J		
36. Amer. Century Intl Disc Fund (mut)		None			Sold	03/04/09	J		
37. Lazard Emerg Markets (mutual)		None			Sold	03/04/09	J		
38. Amer. Century Intl Disc Fund		None			Sold	03/04/09	J		
39. Ishare Russell 1000 growth fund exchange		None			Sold	03/06/09	K		
40. Ishare Russell 1000 Value FUND (ETF)		None			Sold	03/06/09	J		
41. Ishare Russell Midcap Growth Fund		None			Sold	03/06/09	J		
42. Lazard Emerging Markets		None			Sold	03/06/09	J		
43. Amer. Century Intl Disc (Mut)		None			Sold	03/06/09	J		
44. Ishare Russell MSC1 EAFE inded fund (ETF)		None			Sold	03/04/09	J		
45. Ishare Russell 1000 Value (ETF)		None			Sold	03/06/09	M		
46. Ishare Russell 1000 Value (ETF)		None			Sold	03/06/09	J		
47. Ishare Russell Midcap Growth (ETF)		None			Sold	03/06/09	K		
48. Ma. St. Sales Tax 5% 8/15/17	A	Interest	K	T					
49. IRA #1	B	Dividend	L	T					
50. - CurrencyShares Japanese Yen Trust					Buy	03/12/09	J		
51.					Sold	12/16/09	J	A	

1. Income Gain Codes
(See Columns B1 and D1)

A = \$1,000 or less
F = \$50,001 - \$100,000

2. Value Codes
(See Columns C1 and D3)

J = \$15,000 or less
N = \$250,001 - \$500,000

3. Value Method Codes
(See Column C2)

P3 = \$25,000,001 - \$50,000,000
Q = Appraisal
U = Book Value

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

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52 - iShares Barclays 20+ Year Treasury Bond					Buy	03/12/09	J		
53.					Sold	06/02/09	J		
54 - iShares Barclays TIPS Bond Fund 5.298%					Buy	03/12/09	J		
55.					Sold (part)	06/02/09	J	A	
56. - iShares FTSE/Xinhua China 25 Index					Buy	03/12/09	J		
57					Sold (part)	06/02/09	J	A	
58. - iShares iBoxx Investment Grade Corporate Bond Fund					Buy	03/12/09	J		
59					Sold (part)	10/02/09	J	A	
60 - iShares GSCI Commodity Trust					Buy	03/12/09	J		
61.					Buy (add'l)	06/02/09	J		
62.					Sold (part)	10/02/09	J	A	
63					Sold	11/20/09	J	A	
64 - SPDR Barclays Capital International Treasury Bond					Buy	03/12/09	J		
65					Sold	12/16/09	J		
66 - SPDR Gold Trust					Buy	03/12/09	J		
67					Sold (part)	12/23/09	J	A	
68 - Vanguard Bond Index Fund					Buy	03/12/09	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	
3 Value Method Codes (See Column C2)					

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69 - Vanguard International Equity Index					Buy	03/12/09	J		
70					Sold (part)	06/02/09	J	A	
71 - Vanguard REIT Index					Buy	03/12/09	J		
72					Sold	07/16/09	J		
73 - Vanguard Total Stock Market Index					Buy	03/12/09	J		
74					Sold (part)	06/02/09	J	A	
75. - iShares MSCI Japan Index					Buy	03/29/09	J		
76. - iShares MSCI Hong Kong Index					Buy	04/16/09	J		
77					Sold	10/02/09	J	A	
78. - Claymore/BNY Mellon BRIC Index					Buy	06/02/09	J		
79 - iShares Barclays 7-10 Year Treasury Bond Fund					Buy	06/02/09	J		
80 - Vanguard Bond Index Fund					Buy	07/16/09	J		
81 - iShares JPMorgan USD Emerging Markets Bond Fund					Buy	10/02/09	J		
82. - iShares MSCI Germany Index					Buy	10/02/09	J		
83. - iShares Russell 2000 Index					Buy	10/02/09	J		
84 - DB Commodity Index					Buy	11/20/09	J		
85 - SPDR International Gov't Inflation-Protected Bond Index					Buy	12/16/09	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 = Estimate	T = Cash/Market	
3 Value Method Codes (See Column C2)					

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86 - WisdomTree Dreyfus Emerging Currency Fund					Buy	12/06/09	J		
87 - NASDAQ 100 Index					Buy	12/23/09	J		
88									
89									
90									
91. IRA #2	C	Dividend	M	T					
92 - CurrencyShares Japanese Yen Trust					Buy	03/12/09	J		
93					Sold	12/16/09	J	A	
94 - iShares Barclays 20+ Year Treasury Bond					Buy	03/12/09	J		
95					Sold	06/02/09	J		
96 - iShares Barclays TIPS Bond Fund 5.298%					Buy	03/12/09	K		
97					Sold (part)	06/02/09	J	A	
98 - iShares FTSE/Xinhua China 25 Index					Buy	03/12/09	J		
99					Sold (part)	06/02/09	J	A	
100 - iShares iBoxx Investment Grade Corporate Bond Fund					Buy	03/12/09	K		
101					Buy (add'l)	03/27/09	J		
102					Sold (part)	10/02/09	J	B	

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 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	E = \$15,001 - \$50,000
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3. Value Method Codes (See Column C2)				T = Cash Market	

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103. - iShares GSCI Commodity Trust					Buy	03/12/09	J		
104.					Buy (add'l)	06/02/09	J		
105.					Sold (part)	10/02/09	J	A	
106.					Sold	11/20/09	J	A	
107. - SPDR Barclays Capital International Treasury Bond					Buy	03/12/09	J		
108.					Sold	12/16/09	J	A	
109. - SPDR Gold Trust					Buy	03/12/09	J		
110.					Buy (add'l)	06/03/09	J		
111.					Sold (part)	12/23/09	J	B	
112. - Vanguard Bond Index Fund					Buy	03/12/09	J		
113.					Buy (add'l)	07/16/09	J		
114. - Vanguard International Equity Index					Buy	03/12/09	J		
115.					Sold (part)	06/02/09	J	B	
116. - Vanguard REIT Index					Buy	03/12/09	J		
117.					Sold	07/16/09	J	A	
118. - Vanguard Total Stock Market Index					Buy	03/12/09	K		
119.					Sold (part)	06/02/09	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)					

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Name of Person Reporting
Wolf, Mark L.

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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)
120					Sold	12/06/09	J	A	
121. - iShares MSCI Japan Index					Buy	03/29/09	J		
122. - iShares MSCI Hong Kong Index					Buy	04/16/09	J		
123					Sold	10/02/09	J	B	
124 - Claymore/BNY Mellon BRIC Index					Buy	06/02/09	J		
125 - iShares Barclays 7-10 Year Treasury Bond Fund					Buy	06/02/09	J		
126 - iShares JPMorgan USD Emerging Markets Bond Fund					Buy	10/02/09	J		
127. - iShares MSCI Germany Index					Buy	10/02/09	J		
128 - iShares Russell 2000 Index					Buy	10/02/09	J		
129 - DB Commodity Index					Buy	11/20/09	J		
130. - SPDR International Gov't Inflation-Protected Bond Index					Buy	12/16/09	J		
131 - WisdomTree Dreyfus Emerging Currency Fund					Buy	12/06/09	J		
132 - NASDAQ 100 Index					Buy	12/23/09	J		
133									
134									
135									
136 BROKERAGE ACCOUNT #1									

1. Income Gain Codes (See Columns B1 and B4)	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 = \$55,000,001 - \$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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Wolf, Mark L.

Date of Report

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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)
137. CurrencyShares Japanese Yen Trust		None			Buy	03/16/09	J		
138					Buy (add'l)	04/02/09	J		
139.					Sold	12/16/09	J	A	
140 iShares Barclays 1-3 Year Treasury Bond Fund	A	Dividend	K	T	Buy	03/16/09	K		
141.					Buy (add'l)	04/02/09	J		
142					Buy (add'l)	06/02/09	J		
143.					Buy (add'l)	11/17/09	J		
144. iShares Barclays 20+ Year Treasury Bond	A	Dividend			Buy	03/16/09	J		
145.					Buy (add'l)	04/02/09	J		
146					Sold	06/02/09	J		
147 iShares Barclays TIPS Bond Fund 5.298%	A	Dividend	K	T	Buy	03/16/09	J		
148					Buy (add'l)	04/02/09	J		
149					Sold (part)	06/02/09	J	A	
150					Buy (add'l)	11/17/09	J		
151 iShares FTSE/Xinhua China 25 Index	A	Dividend	J	T	Buy	03/16/09	J		
152 iShares iBoxx Investment Grade Corporate Bond Fund	A	Dividend			Buy	03/16/09	J		
153					Buy (add'l)	04/02/09	J		

1. Income/Gain Codes
(See Columns B1 and D4)

2. Value Codes
(See Columns C1 and D3)

3. Value Method Codes
(See Column C2)

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

Q = Appraisal

U = Book Value

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

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Name of Person Reporting

Wolf, Mark L.

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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)
154.					Sold	10/02/09	J	A	
155 SPDR Barclays Capital International Treasury Bond		None			Buy	03/16/09	J		
156					Buy (add'l)	04/02/09	J		
157.					Sold	12/16/09	J	B	
158 SPDR Gold Trust		None	J	T	Buy	03/16/09	J		
159.					Buy (add'l)	04/02/09	J		
160.					Sold (part)	12/09/09	J	A	
161. Vanguard Bond Index Fund	A	Dividend	K	T	Buy	03/16/09	J		
162.					Buy (add'l)	03/16/09	J		
163					Buy (add'l)	04/02/09	J		
164.					Buy (add'l)	11/17/09	J		
165. Vanguard Total Stock Market Index	A	Dividend	J	T	Buy	03/16/09	J		
166					Buy (add'l)	04/02/09	J		
167 iShares MSCI Japan Index	A	Dividend	J	T	Buy	03/26/09	J		
168					Buy (add'l)	04/02/09	J		
169. iShares MSCI Hong Kong Index	A	Dividend			Buy	04/16/09	J		
170.					Sold	10/02/09	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

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

H2 = 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

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Name of Person Reporting

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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-I)	(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)
171. iShares 7-10 Year Treasury Bond Fund	A	Dividend	J	T	Buy	06/02/09	J		
172.					Buy (add'l)	11/17/09	J		
173. iShares GSCI Commodity Trust		None			Buy	06/02/09	J		
174.					Sold	10/02/09	J		
175. iShares JPMorgan USD Emerging Markets Bond Fund	A	Dividend	J	T	Buy	10/02/09	J		
176					Buy (add'l)	12/16/09	J		
177 iShares MSCI Germany Index	A	Dividend	J	T	Buy	10/02/09	J		
178 iShares Russell 2000 Index	A	Dividend	J	T	Buy	10/02/09	J		
179. iShares Barclays Short Treasury Bond Fund	A	Dividend	K	T	Buy	10/28/09	K		
180					Buy (add'l)	11/17/09	J		
181 SPDR International Gov't Inflation-Protected Bond Index	A	Dividend	J	T	Buy (add'l)	12/16/09	J		
182. WisdomTree Dreyfus Emerging Currency Fund	A	Dividend	J	T	Buy	12/06/09	J		
183 NASDAQ 100 Index		None	J	T	Buy	12/23/09	J		
184.									
185.									
186.									
187.									

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 PJ = \$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 H = \$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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Name of Person Reporting
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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)
188 BROKERAGE ACCOUNT #2									
189 McDonald's Corp	A	Dividend	K	T					
190									
191.									
192 BROKERAGE ACCOUNT #3									
193 CurrencyShares Japanese Yen Trust		None			Buy	03/12/09	J		
194					Sold	12/16/09	J	A	
195 iShares Barclays 20+ Year Treasury Bond	A	Dividend			Buy	03/12/09	K		
196.					Sold	06/02/09	J		
197 iShares Barclays TIPS Bond Fund 5 298%	B	Dividend	K	T	Buy	03/12/09	K		
198					Sold (part)	06/02/09	J	A	
199 iShares FTSE/Xinhua China 25 Index	A	Dividend	K	T	Buy	03/12/09	J		
200					Buy (add'l)	03/12/09	J		
201					Sold (part)	06/02/09	J	B	
202 iShares GSCI Commodity Trust		None	J	T	Buy	03/12/09	J		
203					Buy (add'l)	03/12/09	J		
204					Buy (add'l)	06/02/09	K		

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)	O = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	F = 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 mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
205					Sold (part)	10/02/09	K	B	
206. 1Shares iBoxx Investment Grade Corporate Bond Fund	B	Dividend	K	T	Buy	03/12/09	J		
207					Buy (add'l)	03/12/09	J		
208.					Buy (add'l)	03/12/09	J		
209.					Buy (add'l)	03/12/09	J		
210					Buy (add'l)	03/12/09	J		
211					Sold (part)	10/02/09	K	C	
212. SPDR Barclays Capital International Treasury Bond		None			Buy	03/12/09	K		
213					Sold	12/16/09	J	B	
214 SPDR Gold Trust		None	K	T	Buy	03/12/09	K		
215					Sold (part)	12/23/09	K	B	
216. Vanguard Bond Index Fund	A	Dividend	K	T	Buy	03/12/09	J		
217.					Buy (add'l)	07/13/09	J		
218 Vanguard International Equity Index	A	Dividend	J	T	Buy	03/12/09	K		
219					Sold (part)	06/02/09	J	C	
220. Vanguard REIT Index	A	Dividend			Buy	03/12/09	J		
221					Buy (add'l)	03/12/09	J		

1 Income Gain Codes. (See Columns B1 and D4)	A = \$1,000 or less B = \$50,001 - \$100,000 C = \$15,000 or less D = \$250,001 - \$500,000 E = \$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 I1 = 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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Name of Person Reporting

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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)
222					Sold	07/13/09	J	B	
223 Vanguard Total Stock Market Index	B	Dividend	L	T	Buy	03/12/09	J		
224					Buy (add'l)	03/12/09	J		
225					Buy (add'l)	03/12/09	J		
226					Buy (add'l)	03/12/09	J		
227					Buy (add'l)	03/12/09	J		
228					Buy (add'l)	03/12/09	J		
229					Buy (add'l)	03/12/09	J		
230					Buy (add'l)	03/12/09	J		
231					Sold (part)	06/02/09	J	C	
232					Sold (part)	12/06/09	J	B	
233 iShares MSCI Japan Index	A	Dividend	J	T	Buy	03/26/09	J		
234 Claymore/BNY Mellon BRIC Index	A	Dividend	J	T	Buy	06/02/09	J		
235 iShares Barclays 7-10 Year Treasury Bond	A	Dividend	K	T	Buy	06/02/09	K		
236 iShares MSCI Hong Kong Index	A	Dividend			Buy	06/03/09	J		
237					Sold	10/02/09	J	A	
238 iShares JPMorgan USD Emerging Markets Bond Fund	A	Dividend	K	T	Buy	10/02/09	K		

1. Income/Gain Codes

(See Columns B1 and D4)

2. Value Codes

(See Columns C1 and D3)

3. Value Method Codes

(See Column C2)

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

Q = Appraisal

U = Book Value

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

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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)
239. iShares MSCI Germany Index	A	Dividend	J	T	Buy	10/02/09	J		
240. iShares Russell 2000 Index	A	Dividend	K	T	Buy	10/02/09	K		
241. SPDR International Gov't Inflation-Protected Bond Index	A	Dividend	J	T	Buy	12/16/09	J		
242. WisdomTree Dreyfus Emerging Currency Fund	A	Dividend	J	T	Buy	12/16/09	J		
243. NASDAQ 100 Index		None	J	T	Buy	12/23/09	J		
244.									
245.									
246.									
247. BROKERAGE ACCOUNT #4	B	Dividend	L	T					
248. CurrencyShares Japanese Yen Trust		None			Buy	03/12/09	J		
249.					Sold	12/16/09	J	A	
250. iShares Barclays 1-3 Year Treasury Bond	A	Dividend	J	T	Buy	03/12/09	J		
251.					Buy (add'l)	03/12/09	J		
252.					Sold (part)	06/17/09	J		
253.					Buy (add'l)	10/23/09	J		
254. iShares Barclays 20+ Year Treasury Bond	A	Dividend			Buy	03/12/09	J		
255.					Sold	06/02/09	J		

1 Income Gain Codes.
(See Columns B1 and D4)

2 Value Codes
(See Columns C1 and D3)

3 Value Method Codes
(See Column C2)

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

Q = Appraisal

U = Book Value

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

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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)
256. iShares Barclays TIPS Bond Fund 5.298%	A	Dividend	J	T	Buy	03/12/09	J		
257					Sold (part)	06/02/09	J	A	
258. iShares FTSE/Xinhua China 25 Index	A	Dividend	J	T	Buy	03/12/09	J		
259.					Sold (part)	06/02/09	J	A	
260. iShares iBoxx Investment Grade Corporate Bond Fund	A	Dividend			Buy	03/12/09	J		
261.					Sold	10/02/09	J	A	
262 SPDR Barclays Capital International Treasury Bond		None			Buy	03/12/09	J		
263					Sold	12/16/09	J	A	
264 SPDR Gold Trust		None	J	T	Buy	03/12/09	J		
265.					Sold (part)	12/09/09	J	A	
266 Vanguard Bond Index Fund	A	Dividend	J	T	Buy	03/12/09	J		
267 Vanguard Total Stock Market Index	A	Dividend	J	T	Buy	03/12/09	J		
268.					Sold (part)	06/02/09	J	A	
269 iShares MSCI Japan Index	A	Dividend	J	T	Buy	03/26/09	J		
270 iShares MSCI Hong Kong Index	A	Dividend			Buy	04/16/09	J		
271					Sold	10/02/09	J	A	
272 iShares Barclays 7-10 Year Treasury Bond	A	Dividend	J	T	Buy	06/02/09	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	
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 mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)	
273. iShares GSCI Commodity Trust		None			Buy	06/02/09	J			
274					Sold	10/02/09	J			
275 iShares JPMorgan USD Emerging Markets Bond Fund	A	Dividend	J	T	Buy	10/02/09	J			
276					Buy (add'l)	12/16/09	J			
277. iShares MSCI Germany Index	A	Dividend	J	T	Buy	10/02/09	J			
278 Russell 2000 Index	A	Dividend	J	T	Buy	10/02/09	J			
279. SPDR International Gov't Inflation-Protected Bond Index	A	Dividend	J	T	Buy	12/16/09	J			
280 WisdomTree Dreyfus Emerging Currency Fund	A	Dividend	J	T	Buy	12/16/09	J			
281 NASDAQ 100 Index		None	J	T	Buy	12/23/09	J			
282.										
283.										
284										
285 CHARLES SCHWAB MONEY MARKET ACCOUNT	A	Dividend	K	T						
286										
287										
288.										

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

At the beginning of 2009 many of the assets owned by [REDACTED] and me continued to be held and managed by Atlantic Trust Peli Rudman ("ATPR"), an investment advisory firm. In March, 2009, many of those assets were sold in connection with a transition to another investment advisory firm, Windward Investments ("Windward").

ATPR and Windward provided the information contained in this Report concerning assets that were in their custody for parts of 2009. That information is, to the best of my knowledge, accurate and complete.

In my Financial Disclosure Report for 2008, in Part VII, lines 31 and 32, two sales of Dodge & Cox Stock Fund were reported as "Sold (part)." The second entry should have stated "Sold" because all of the remainder of that Fund was sold on October 8, 2008. No Dodge & Cox Stock Fund was owned in 2009 and, therefore, it is not included in Part VII of this Report.

This Report, in Part VII beginning on lines 49 and 91, provides information concerning two IRAs. Although not designated as such in my Reports for prior years, [REDACTED] and I had IRAs managed by ATPR. Not recognizing that there are different reporting requirements for Aggregate Ownership Arrangements such as IRAs, in the past I reported more details concerning the assets in [REDACTED] IRAs than required. The two IRAs included in this Report are "rollover IRAs" for federal tax purposes. The assets in them were acquired by Windward with the proceeds of the assets in our IRAs selected and managed by ATPR. The information concerning the IRAs in this Report is provided in the manner prescribed for Aggregate Ownership Arrangements.

While [REDACTED] and I invest in what Windward calls "Funds," through which identical investments are made simultaneously for many investors, these are not mutual funds, rather various index shares are bought and sold for [REDACTED] individual accounts at various times. Therefore, there are many transactions described in this Report which would not be required to be reported if [REDACTED] were invested in mutual funds which engaged in similar transactions.

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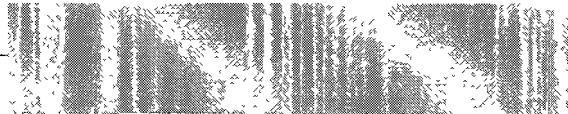
05/14/2010

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:

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Administrative Office of the United States Courts
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One Columbus Circle, N.E.
Washington, D.C. 20544