

FINANCIAL DISCLOSURE REPORT
FOR CALENDAR YEAR 2004

Report Required by the Ethics
in Government Act of 1978
(5 U.S.C. app. §§ 101-111)

1. Person Reporting (Last name, First name, Middle initial) Bertelsman, William O	2. Court or Organization KY-ED	3. Date of Report 5/9/2005
4. Title (Article III Judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Judge (Senior)	5. ReportType (check appropriate type) ☐ Nomination, ☐ Date ☐ Initial ☒ Annual ☐ Final	6. Reporting Period 1/1/2004 to 12/31/2004
7. Chambers or Office Address 35 West Fifth Street, Rm. 505 P. O. Box 1012 Covington, KY 41012-1012	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.)

POSITION

NAME OF ORGANIZATION/ENTITY

1. Adjunct Teacher (part-time)(one class)

Salmon P. Chase College of Law, Northern Kentucky University, Highland Heights, KY

2. Owner

529 Trust Plans #1-#9

II. AGREEMENTS. (Reporting individual only; see pp. 14-16 of filing instructions)

☒ **NONE** - (No reportable agreements.)

DATE

PARTIES AND TERMS

1.

RECEIVED
2005 MAY 16 A 10:50
FINANCIAL
DISCLOSURE OFFICE

FINANCIAL DISCLOSURE REPORT

Name of Person Reporting

Bertelsman, William O

Date of Report

5/9/2005

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.)DATESOURCE AND TYPEGROSS INCOME

(yours, not spouse's)

1. 2004

Salmon P. Chase College of Law -- teaching fee

1,816

B. Spouse's Non-Investment Income - (If you were married during any portion of the reporting year, please complete this section. Dollar amount not required except for honoraria.)☐ **NONE** - (No reportable non-investment income.)DATESOURCE AND TYPE

1. 2004

Council on Postsecondary Education

IV. REIMBURSEMENTS -- transportation, lodging, food, entertainment.

(Includes those to spouse and dependent children. See pp. 25-27 of instructions.)

☒ **NONE** - (No such reportable reimbursements.)SOURCEDESCRIPTION

1.

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V. GIFTS. (Includes those to spouse and dependent children. See pp. 28-31 of instructions.)

☒ **NONE** - (No such reportable gifts.)

SOURCE

DESCRIPTION

VALUE

1.

VI. LIABILITIES. (Includes those of spouse and dependent children. See pp. 32-34 of instructions.)

☒ **NONE** - (No reportable liabilities.)

CREDITOR

DESCRIPTION

VALUE CODE

1.

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VII. INVESTMENTS and TRUSTS — income, value, transactions (includes those of the spouse and dependent children. See pp. 34-57 of filing instructions.)

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, merger, redemption)	If not exempt from disclosure			
						(2) Date: Month - Day	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
☐ NONE (No reportable income, assets, or transactions)									
1. Victory Gradison Government Reserve #1	A	Dividend	L	T					
2. Dreyfus Municipal Bond Fund	B	Interest	K	T					
3. Dreyfus Intermediate Municipal Bond Fund	C	Interest	L	T					
4. Dreyfus Gold Fund		None	K	T					
5. Victory Tax Free Fund	A	Dividend			Sold	5/11	J	A	
6. Legg Mason Europe Fund (stock)	A	Dividend	J	T					
7. U.S. Bank, Fort Thomas, KY	A	Interest	J	T					Merged #36 with this
8. Dreyfus Short Intermedidate Municipal Bond Fund	B	Interest	L	T					
9. Dupree, Kentucky- Short/Med. Fund	A	Interest	L	T					
10. Dupree, Kentucky - Tax Free Fund	B	Interest	N	T					Merged #89 with this
11. [REDACTED] Undeveloped Lots in Charlotte Co., Florida		None	J	W					
12. [REDACTED] Undeveloped Lots in Port Charlotte, Florida		None			Sold	7/13	K	E	
13. Providence Montessori Kentucky (School)	A	Interest	K	T					
14. Fifth Third Bank (Account)	A	Interest	K	T					
15. Star Bank Stellar Fund	A	Dividend			Sold	4/8	K	A	
16. Citizens Bank of Campbell County, KY (shares)	A	Dividend	K	T					
17. Fifth Third Bank, Fort Thomas, KY (Common Shares)	A	Dividend	M	T					
18. Victory Established Value Fund G	A	Dividend	K	T					

1. Income/Gain Codes: 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
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19. Dreyfus Growth & Income Fund	A	Dividend	J	T					
20. Estill County, Kentucky PPC [REDACTED]	A	Interest			Matured	8/2	J	A	
21. Kentucky League of Cities (Dayton, KY) [REDACTED]	A	Interest	J	T					
22. Kentucky League of Cities (Dayton, KY) [REDACTED]	A	Interest			Redeemed	8/2	K	A	
23. Victory Gradison Government Reserve 2	A	Dividend	J	T					
24. Floyd County, Kentucky (School) [REDACTED]	A	Interest			Redeemed	9/1	J	A	
25. Bank of Kentucky (Account)	C	Interest	L	T					
26. Lincoln County, KY (Public Property) [REDACTED]	A	Interest	J	T					
27. Procter & Gamble - Common stock	A	Dividend	K	T					
28. Citizens Bank of Campbell Co., Kentucky (Accounts)	D	Interest	M	T					
29. Victory Small Company Fund	A	Dividend	J	T					
30. NCR Corp. (common stock)		None	J	T					
31. Pomeroy Computer Res. (Common stock)		None	J	T					
32. BankAmerica Corp. (Common stock)	A	Dividend	K	T					
33. Bank of Kentucky (Account)	C	Interest	L	T					
34. United States Savings Bonds (I)	B	Interest	L	T					
35. Kentucky Interlocal School [REDACTED] (due 12/1/04)	A	Interest			Redeemed	12/1	J	A	
36. Star Bank (now US Bank) (Account)	A	Interest	J	T					Merged with #7 above

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37. Carrollton & Henderson KY (Public Energy) [REDACTED]	A	Interest	J	T					
38. American Int'l Group, Inc.	A	Dividend	K	T					
39. Conagra Foods, Inc.	A	Dividend	J	T					
40. First Data Corp.	A	Dividend	K	T					
41. Sherwin Williams	A	Dividend	J	T					
42. Tyco International Ltd.	A	Dividend	J	T					
43. Scudder Dremar High Return Fund	A	Dividend	K	T					
44. Russell County, KY Hospital	A	Interest	K	T					
45. Mill Valley One Ltd. (Ltd. partnership) (promissory note)	A	Interest	J	T					
46. American Express Co.	A	Dividend	J	T					
47. Kroger Co.	A	Dividend	J	T					
48. Merck & Company, Inc.	A	Dividend			Sold	12/31	J	A	
49. Sun Microsystems, Inc.		None			Sold	9/20	J	A	
50. Ross Sinclair Brokerage(Account)	A	Dividend	J	T					
51. Harlan County, KY Health Care Facs Laurel Prj [REDACTED]	A	Interest	K	T					
52. Eastern Ky Univ Revs.Sys Due 2/1/09 [REDACTED]	A	Interest	J	T					
53. Victory Stock Index Fund (Account)	A	Dividend	J	T					
54. Barboursville Ky EDL Bldg Rev (Union College) [REDACTED]	A	Interest	J	T					

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55. Victory Gradison Government Reserve #3	A	Dividend	J	T					
56. Kentucky State Property & Bldg. [REDACTED]	A	Interest	K	T					
57. J.M.Smucker Co.	A	Dividend	J	T					
58. Ageere Systems Inc.	A	Dividend			Sold	1/13	J	A	
59. Comcast Corp. Class A	A	Dividend	J	T					
60. 529 Trust #1	B	Interest	M	T					
61. 529 Trust #2	B	Interest	M	T					
62. 529 Trust #3	B	Interest	M	T					
63. 529 Trust #4	B	Interest	M	T					
64. 529 Trust #5	B	Interest	M	T					
65. 529 Trust #6	B	Interest	M	T					
66. Allstate Corp.	D	Dividend	N	T					
67. BP PLC	B	Dividend	L	T					
68. Burlington No. Santa Fe	A	Dividend			Sold	6/18	J	B	
69. Burlington Resources	A	Dividend	J	T					
70. Chevron-Texaco Corp.	B	Dividend	K	T					
71. Cinergy Corp.	A	Dividend	J	T					
72. Clorox Co.	B	Dividend	L	T					

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73. Conoco Phillips	A	Dividend	J	T					
74. Exxon Mobil Corp.	A	Dividend	K	T					
75. General Mills Inc.	A	Dividend	K	T					
76. Kerr McGee Corp.	A	Dividend	J	T					
77. Pepsico Inc.	C	Dividend	M	T					
78. Pfizer, Inc.	D	Dividend	M	T					
79. Procter & Gamble Co.	E	Dividend	O	T					
80. J.M. Smucker	A	Dividend	J	T					Merged with #57
81. Southern Co.	C	Dividend	L	T					
82. Sunoco, Inc.	A	Dividend	K	T					
83. Wachovia Corp.	A	Dividend	K	T					
84. Whirlpool Corp.	A	Dividend	J	T					
85. Wisconsin Energy Corp.	B	Dividend	L	T					
86. Xcel Energy, Inc.	A	Dividend	J	T					
87. Yum Brands, Inc.	A	Dividend	L	T					
88. U.S. Savings Bonds (H)	A	Interest	K	T					
89. Dupree Mutual Funds	D	Dividend	M	T					Merged with #10 above
90. 529 Trust #7	B	Interest	M	T					

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91. 529 Trust #8	B	Interest	M	T					
92. 529 Trust #9	B	Interest	M	T					
93. Louisville & Jefferson Co., KY Metro Sewer & Drain Bond	C	Interest	K	T					
94. Elizabethtown, KY Public Properties Bond	B	Interest	K	T					
95. University of Louisville, KY Educational Bldg. Bond	B	Interest	K	T					
96. Kentucky State Turnpike Authority Bond	C	Interest	K	T					
97. Kentucky State Property & Bldgs. Communication Revenue Bond	C	Interest	K	T					
98. Northern Kentucky Water District Bond	B	Interest	K	T					
99. Clay County, KY Justice Center Bond	B	Interest	K	T					
100. Owensboro, KY Public Project Bond	B	Interest	K	T					
101. Kentucky State Property & Bldgs Revenue Bond	C	Interest	K	T					
102. E-Trade Account	A	Interest	J	T	Buy	9/20	J		
103. Ky. State Turnpike Bond 3.6%	A	Interest	J	T	Buy	9/8	J		
104. Ky. State Turnpike Bond 3.75%	A	Interest	K	T	Buy	9/8	K		
105. Automatic Data Processing, Inc.	A	Dividend	K	T	Buy	1/8	K		
106. Johnson & Johnson	A	Dividend	K	T	Buy	1/8	K		
107. T-Rowe Price Equity Index 500	A	Interest	K	T	Buy	12/31	K		*Bought 2002 - prev. omitted
108. Templeton Foreign Fund C1 A	A	Interest	K	T	Buy	12/15	K		*Bought 2003 - prev. omitted

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109. Growth Fund of America	A	Interest	K	T	Buy	12/31	K		*Bought 2002- prev.omitted
110. Ky. State Property & Bldg. Commn. Bond	A	Interest	K	T	Buy	10/30	K		*Bought 2003 - prev.omitted

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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. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature

Date

May 9, 2005

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