

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) Davis, William E.	2. Court or Organization U.S. Court of Appeals, 5th Cir	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. Circuit 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 800 Lafayette St Suite 5100 Lafayette, LA 70501	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. Partner

Partnership composed of Michael R. Morton and me on property listed under Item VII. Partnership exists solely to own and rent real estate

2.

3.

4.

5.

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

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

DATE

PARTIES AND TERMS

1.

2.

3.

Davis, William E.

FINANCIAL DISCLOSURE REPORT

Page 2 of 8

Name of Person Reporting

Davis, William E.

Date of Report

05/11/2010

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.		
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. 12-31-09	Tanner Companies, Inc. (self-employed retail sales-women's clothing (S))
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.	FREE	July 17-23	Gallatin Gateway, MT	Educational Seminar	Transportation, Food, Housing
2.	George Mason University School of Law	Oct. 18-21	San Diego, CA	Educational Seminar	Transportation, Food, Housing
3.					
4.					
5.					

FINANCIAL DISCLOSURE REPORT

Page 3 of 8

Name of Person Reporting

Davis, William E.

Date of Report

05/11/2010

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. Whitney National Bank,, successor to First National Bank, Lafayette, LA 70509	An in rem mortgage (no personal liability) is in effect on office building and warehouse	M
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

FINANCIAL DISCLOSURE REPORT

Page 4 of 8

Name of Person Reporting

Davis, William E.

Date of Report

05/11/2010

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 I (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 I (A-H)	(5) Identity of buyer/seller (if private transaction)
1. Checking acct., Whitney Bank Lafayette, LA	A	Interest	J	T					
2. 1/2 Interest-New Iberia, LA, office building & warehouse	E	Rent	M	W					
3. Common stock, Land Coast Insulation, Inc.	C	Dividend	M	W					
4. Vanguard Short Term Tax Exe (1/2 interest)	B	Interest	L	T					
5. Vanguard Inter-Term Tax Exempt	C	Interest			Sold	06/16/09	M		
6. Vanguard Tax Exempt Money Mkt	A	Interest	M	T	Buy	06/16/09	M		
7. Vanguard Short-Term Tax Ex. Admiral	C	Dividend	M	T					
8. Vanguard Limited Term Tax Exempt	B	Dividend	K	T					
9. Vanguard Health Care Fund	A	Dividend	J	T					
10. Vanguard Total Int'l Stock Fund Index	A	Dividend	K	T					
11. Vanguard Money Mkt Fund	A	Interest	J	T					
12. Vanguard GNMA Fund	A	Dividend	K	T					
13. Vanguard Total Stock Mkt Fund (IRA)	B	Dividend	M	T					
14. Louisiana Stad & Expo Dist. (Bond)	A	Interest	K	T					
15. New Orleans, LA Pub. Impt. (Bond)	C	Interest			Redeemed	11/2/09	L		
16. Louisiana LOC Govt. Environment Bond	A	Int./Div.	K	T	Buy	08/14/09	K		
17. Whitney CD	A	Interest	L	T	Buy	11/25/09	L		

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

FINANCIAL DISCLOSURE REPORT

Page 5 of 8

Name of Person Reporting

Davis, William E.

Date of Report

05/11/2010

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☐ 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. Chase CE ☐ Converted to Vanguard	D	Interest			Sold	6/10/09	M		
19. Chase CD ☐ Converted to Vanguard	A	Interest			Sold	06/10/09	K		
20. Vernon Parish Bond	A	Interest	K	T					
21. Smith Barney converted to CitiBankDakota Bank Deposit Progra	A	Interest	J	T					
22. Royal Bank of Scotland ☐	A	Dividend	J	T					
23. Citigroup Inc.	A	Dividend	J	T					
24. Duff Phelps DNP Select Income Fund	A	Dividend	J	T					
25. Eaton Vance Income Fund	B	Dividend	K	T					
26. Citigroup Capital	B	Interest	K	T					
27. Ernest Morial - New Orleans, LA (Bond)	A	Interest	K	T					
28. General Electric Capital Corp.	A	Interest	J	T					
29. General Motors	A	Dividend	K	T					
30. Intel Corp.	A	Interest	J	T					
31. Jefferson Parish LA Rev. Pub (Bond)	B	Distribution	K	T					
32. Progress Energy Inc.	A	Interest	J	T					
33. Regions FDIC	A	Dividend	J	T					
34. Regions Bank CD	B	Dividend	K	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 D1)	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 6 of 8

Name of Person Reporting

Davis, William E.

Date of Report

05/11/2010

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35. BAC Capital Trust	A	Dividend	J	T					
36. Royal Bank of Scotland	A	Dividend	J	T					
37. USB Capital	B	Dividend	K	T					
38. Cisco Systems		None	J	T					
39. Webster Parish School (Bond)	B	Interest	K	T					
40. Urstadt Biddle Properties	A	Interest	J	T					
41. Edge Petroleum	A	Royalty	J	T					
42. Home Bank Stock	A	Dividend	K	T					
43. Alabama Power	A	Interest	K	T					
44. Western Asset	A	Interest	J	T					
45. Whitney Holding	A	Dividend	K	T					
46. Municipal Bond New Orleans, LA Public Improvement	A	Interest	J	T					
47. Whitney Holding	A	Interest	J	T					
48. Montag & Caldwell Growth (IRA) (X)		None	J	T					

1. Income Gain Codes

(See Columns B1 and D4)

2. Value Codes

(See Columns C1 and D3)

3. Value Method Codes

(See Column C2)

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P2 = \$5,000,001 - \$25,000,000

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FINANCIAL DISCLOSURE REPORT
Page 7 of 8

Name of Person Reporting

Davis, William E.

Date of Report

05/11/2010

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

Line 48. _____ | IRA, inadvertently omitted from previous years.

FINANCIAL DISCLOSURE REPORT

Page 8 of 8

Name of Person Reporting	Date of Report
Davis, William E.	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