

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2018

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) Bade, Bridget S.	2. Court or Organization U.S. District Court, Arizona	3. Date of Report 4/23/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Magistrate Judge - Full Time	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2018 to 12/31/2018
7. Chambers or Office Address Sandra Day O'Connor U.S. Courthouse 401 W. Washington Street, Suite 321 Phoenix, Arizona 85003		
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.		

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.	Co-Trustee	Trust #1 (revocable trust)
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.		
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.)*DATESOURCE AND TYPEINCOME
(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.)*DATESOURCE AND TYPE

1. 2018

Self-Employed Attorney

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.)*SOURCEDATESLOCATIONPURPOSEITEMS PAID OR PROVIDED

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.		
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.		

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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. (H) ACCOUNTS									
2. Arizona Central Credit Union	A	Interest	L	T					
3. (H) BSB ROTH IRA - BAIRD									
4. ACSYX - Invesco Comstock Fund	A	Dividend	J	T					
5.	A	Distribution							
6. MQLFX - MFS Limited Maturity Fund	A	Dividend	J	T					
7. (H) TWB ROTH IRA - BAIRD									
8. NYVCX - Davis NY Venture Fund	A	Dividend	J	T					
9.	A	Distribution							
10. MQLFX - MFS Limited Maturity Fund	A	Dividend	J	T					
11. (H) MNB COVERDELL ESA - BAIRD									
12. NYVCX - Davis NY Venture Fund	A	Dividend	K	T					
13.	C	Distribution							
14. (H) BSB ROLLOVER IRA - BAIRD									
15. Baird Money Market Account	A	Interest	J	T					
16. C common stock	A	Dividend	J	T					
17. ESRX common stock		None			Merged (with line 18)	12/24/18	J	A	

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
(See Columns B1 and D4)	F = \$50,001 - \$100,000	G = \$100,001 - \$1,000,000	H1 = \$1,000,001 - \$5,000,000	H2 = More than \$5,000,000	
2. Value Codes	J = \$15,000 or less	K = \$15,001 - \$50,000	L = \$50,001 - \$100,000	M = \$100,001 - \$250,000	
(See Columns C1 and D3)	N = \$250,001 - \$500,000	O = \$500,001 - \$1,000,000	P1 = \$1,000,001 - \$5,000,000	P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
(See Column C2)	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
	U = Book Value	V = Other	W = Estimated		

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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				
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18. CI common stock (ESRX merged with CI on 12/24/18)		None	J	T					
19. GE common stock	A	Dividend	J	T					
20. HD common stock	A	Dividend	K	T					
21. MRK common stock	A	Dividend	J	T					
22. MSFT common stock	A	Dividend	K	T					
23. PG common stock	A	Dividend	J	T					
24. XCEL common stock	A	Dividend	K	T					
25. (H) TWB ROLLOVER IRA - BAIRD									
26. Baird Money Market Account	A	Interest	J	T					
27. MO common stock	A	Dividend	J	T					
28. BAC common stock	A	Dividend	J	T					
29. C common stock	A	Dividend	J	T					
30. CSCO common stock	A	Dividend	K	T					
31. COP common stock	A	Dividend	K	T					
32. GE common stock	A	Dividend	J	T					
33. INTC common stock	A	Dividend	J	T					
34. JPM common stock	A	Dividend	J	T					

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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	

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35. JNJ common stock	A	Dividend	K	T					
36. KHC common stock	A	Dividend	J	T					
37. MRK common stock	A	Dividend	J	T					
38. MSFT common stock	A	Dividend	J	T					
39. MDLZ common stock	A	Dividend	J	T					
40. PM common stock	B	Dividend	K	T					
41. PFE common stock	A	Dividend	J	T					
42. PSX common stock	A	Dividend	J	T					
43. DBO - Powershares DB Multi Sector Commodity Trust Oil Fund	A	Distribution	J	T					
44. XCEL common stock	A	Dividend	J	T					
45. BSPAX - iShares S&P 500 Index Fund	A	Dividend	K	T					
46.	A	Distribution							
47. (H) BSB ROLLOVER IRA - BEACON POINTE									
48. FDIC Insured Deposit Account - Cash	A	Interest	J	T					
49. IWB - iShares Russell 1000 Index Fund	A	Dividend	K	T					
50. CHDVX - Cullen Value High Dividend Equity Fund	A	Dividend	K	T	Buy (add'l)	12/13/18	J		
51.	C	Distribution							

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52. SGIIX - First Eagle Global Fund	A	Dividend	K	T					
53.	B	Distribution							
54. SDRIX - Swan Defined Risk Fund	A	Dividend	K	T					
55. GE common stock	A	Dividend	J	T					
56. GS common stock	A	Dividend	J	T					
57. BSIIX - BlackRock Strategic Income Opps Instl Fund	A	Dividend	K	T					
58. DHSCX - Diamond Hill Small Cap Fund		None			Sold	01/09/18	J	A	
59. BPRIX - BP L/S Research Instl Fund		None			Sold	01/09/18	J	A	
60. HAVLX - Harbor Large Cap Value Fund	A	Dividend	K	T	Buy	01/09/18	K		
61.	A	Distribution							
62. (H) TRUST #1 - BEACON POINTE (formerly joint tenant account)									
63. FDIC Insured Deposit Account - Cash	A	Interest	J	T					
64. SGIIX - First Eagle Global Fund	A	Dividend	K	T					
65.	A	Distribution							
66. SDRIX - Swan Defined Risk Fund	A	Dividend	K	T	Buy (add'l)	05/31/18	J		
67.					Buy (add'l)	12/14/18	J		
68. DHSCX - Diamond Hill Small Cap Fund	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
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69.	A	Distribution							
70. BAC common stock	A	Dividend	J	T					
71. AEPFX - American Funds Europacific Growth Fund	A	Dividend			Buy (add'l)	01/09/18	J		
72.					Sold	12/13/18	K	A	
73. HILVX - Harbor Large Cap Value Fund	A	Dividend	J	T	Buy	05/31/18	J		
74.	A	Distribution							
75. IEFA - iShares Core MSCI EAFE ETF		None	K	T	Buy	12/13/18	K		
76. (H) TWB ROLLOVER IRA - BEACON POINTE									
77. FDIC Insured Deposit Account - Cash	A	Interest	J	T					
78. GS common stock	A	Dividend	J	T					
79. DHSIX - Diamond Hill Small Cap Fund	A	Dividend	K	T					
80.	B	Distribution							
81. BSIIX - BlackRock Strategic Income Opps Instl Fund	A	Dividend	L	T	Buy (add'l)	05/31/18	K		
82. MWTRX - Metropolitan West Total Return Bond Fund	A	Dividend			Sold	05/31/18	K	A	
83. FPACX - FPA Crescent Fund	A	Dividend	J	T					
84.	A	Distribution							
85. SDRIX - Swan Defined Risk Fund	A	Dividend	K	T					

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86. BPRIX - BP L/S Research Instl Fundv		None			Sold	01/09/18	K	A	
87. ODVYX - Oppenheimer Developing Markets Fund	A	Dividend	K	T					
88. CHDEX - Cullen High Dividend Equity Retail Fund		None			Sold	01/09/18	K	A	
89. CHDVX - Cullen High Dividend Equity Instl Fund	A	Dividend	K	T	Buy	01/09/18	K		
90.	B	Distribution							
91. SGENX - First Eagle Global Fund	A	Dividend	J	T					
92.	A	Distribution							
93. (H) TWB ROLLOVER IRA - BEACON POINTE - SARATOGA VALUE									
94. FDIC Insured Deposit Account - Cash	A	Interest	J	T					
95. TISXX - Federated US Treasury Cash Reserves Fund	A	Interest	L	T					
96. MMM common stock		None			Sold	01/18/18	J	B	
97. AAPL common stock	A	Dividend	J	T					
98. ACN common stock	A	Dividend	J	T					
99. BDX common stock	A	Dividend	J	T					
100. BRK B common stock	A	Dividend	J	T					
101. BIIB common stock		None	J	T					
102. CHRW common stock	A	Dividend	J	T					

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103. CTSH common stock	A	Dividend	J	T					
104. CSCO common stock	A	Dividend	J	T	Sold (part)	02/15/18	J	A	
105. TPR common stock		None			Sold	02/06/18	J	A	
106. KO common stock	A	Dividend	J	T					
107. IBM common stock	A	Dividend	J	T	Buy (add'l)	04/04/18	J		
108. JNJ common stock	A	Dividend	J	T					
109. MDT common stock	A	Dividend	J	T					
110. MSFT common stock	A	Dividend	J	T					
111. NKE common stock	A	Dividend	J	T					
112. NVO common stock	A	Dividend	J	T					
113. OMC common stock	A	Dividend	J	T					
114. ORCL common stock	A	Dividend	J	T					
115. PEP common stock	A	Dividend	J	T					
116. PHI common stock	A	Dividend	J	T					
117. PG common stock	A	Dividend	J	T					
118. RBGLY common stock	A	Dividend	J	T	Buy	04/30/18	J		
119. SBUX common stock	A	Dividend	J	T	Buy	06/05/18	J		

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120. TSS common stock		None			Sold	01/05/18	J	A	
121. UTX common stock	A	Dividend	J	T	Buy (add'l)	11/27/18	J		
122. VAR common stock	A	Dividend	J	T	Sold (part)	01/25/18	J	A	
123. WMT common stock	A	Dividend	J	T	Sold (part)	01/05/18	J	A	
124. DIS common stock	A	Dividend	J	T					
125. (H) LIFE INSURANCE POLICIES									
126. Northwestern Mutual Whole Life	A	Dividend	J	T					
127. Northwestern Mutual Adjustable CompLife	A	Dividend	J	T					
128. Northwestern Mutual Adjustable CompLife	A	Dividend	J	T					
129. Northwestern Mutual Whole Life	A	Dividend	J	T					
130. Northwestern Mutual 65 Life	A	Dividend	J	T					
131. (H) OFFICE CONDO									
132. TBM2 Investments LLC - office condo in Tempe, AZ	F	Rent	O	W					
133. (H) TBM2 PROMISSORY NOTE									
134. Promissory Note from TBM2 Investments LLC	E	Interest	N	T					
135.									
136.									

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	

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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.									
138.									
139.									

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	

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

Part I. Positions. The judge is the co-trustee of Trust #1, which is a revocable trust. The assets held in the name of Trust #1 include a brokerage account reported in Part VII, lines 62-75, the judge's personal residence, and the membership interests in TBM2 Investments LLC. The residence does not have to be reported in Part VII, and the assets of TBM2 Investments LLC are reported in Part VII, lines 135-36.

Part VII. The TDAM Municipal Portfolio and the TDAM Government Portfolio listed on lines 50, 64, 75 and 91 of the judge's 2017 Annual Report were replaced the FDIC Insured Deposit Accounts listed on lines 48, 63, 77 and 94 of this Annual Report. Beacon Pointe changed the manner in which they manage cash in investment accounts. Previously, they used money market funds managed by TD Ameritrade, which included the TDAM Municipal Portfolio and the TDAM Government Portfolio. Now, they use FDIC insured accounts. In addition, a significant portion of the TDAM Municipal Portfolio on line 91 of the judge's 2017 Annual Report is now held in TISXX - Federated US Treasury Cash Reserves on line 95 of this Annual Report, which is a different money market account. All of these accounts/money market funds simply represent different ways to hold and manage cash that has not been deployed for long-term investment.

Part VII. Office condo. The membership interests in TBM2 Investments LLC are owned equally by the judge and her spouse through Trust #1. The judge's spouse is the manager of the LLC.

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

Signature: **s/ Bridget S. Bade**

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 104)

Committee on Financial Disclosure
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