

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) Beckerman, Stacie F.	2. Court or Organization U.S. District Court, Oregon	3. Date of Report 08/01/2019
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 927 U.S. Courthouse 1000 SW Third Ave. Portland, OR 97204		
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.	Director	U.S. District Court Historical Society
2.	Director	Oregon Women Judges
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.)*

<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. 2018	Providence Health & Services (spouse's wages)
2. 2018	Self-employed spouse (writing, consulting, speaking)
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.				

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V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*

☒ NONE *(No reportable gifts.)*

SOURCE	DESCRIPTION	VALUE
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.)*

CREDITOR	DESCRIPTION	VALUE 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. Chase Bank (various accounts)	A	Interest	L	T					
2. Fidelity Investments Partners 403(b) - Vang Tar Ret 2035	B	Int./Div.	L	T					
3. Fidelity Investments Roth IRA - Fidelity Growth Strategic Fund	A	Int./Div.	J	T					
4. Fidelity Investments PHandS Value Plan 403B	D	Int./Div.	N	T					
5. Fidelity Investments PHandS DC - VITFX Restoration	C	Int./Div.	M	T					
6. Fidelity Investments PHandS 457(B) Plan - VITFX	D	Int./Div.	M	T					
7. Fidelity Investments MGH Academic Annuity - Vang Tar Ret 2035	A	Int./Div.	J	T					
8. pxFidelity Investments PHandS 401(A) Service - VITFX	B	Int./Div.	L	T					
9. Fidelity Investments MGH TSA - Vang Tar Ret 2035	A	Int./Div.	K	T					
10. Oregon College Savings Plan Aggressive 1 Portfolio		None	M	T					
11. Oregon College Savings Plan Aggressive Portfolio 2		None	M	T					
12. Oregon College Savings Plan U.S. Equity Index Portfolio 1		None	M	T					
13. Oregon College Savings Plan U.S. Equity Index Portfolio 2		None	M	T					
14. TIAA-CREF Retirement Savings Plan (H)									
15. -- CREF Equity Index R3		None	L	T					
16. -- CREF Fond Market R3		None	J	T					
17. -- CREF Global Equities R3		None	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 = \$250,000.001 - \$500,000.000	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	

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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. -- CREF Money Market R3		None	J	T					
19. Empower Retirement Skadden Arps Savings Plan (H)									
20. -- Vanguard Institutional Index I		None	M	T					
21. -- ClearBridge Small Cap Growth		None	L	T					
22. -- T. Rowe Price Growth Stock Trust		None	K	T					
23. -- Dodge & Cox Stock		None	J	T					
24. -- Vanguard Total Bond Market Index I		None	J	T					
25. Charles Schwab Roth Conversion IRA (H)									
26. -- BDX	A	Dividend	J	T					
27. -- LOW	A	Dividend	J	T	Sold (part)	10/12/18	J	C	
28. -- PEP	A	Dividend	J	T					
29. -- PNC	A	Dividend	J	T					
30. -- PFE	A	Dividend	J	T					
31. -- MA	A	Dividend	K	T					
32. -- Schwab Value Advantage Fund	A	Dividend	K	T					
33. -- CL	A	Dividend	J	T					
34. -- ETN	A	Dividend			Sold	12/5/18	J	C	

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35. -- BCE	A	Dividend	J	T					
36. -- RSG	A	Dividend	J	T					
37. -- JNJ	A	Dividend	J	T					
38. -- UPS	A	Dividend			Sold	10/5/18	J	C	
39. -- MSFT	A	Dividend	K	T					
40. -- UN	A	Dividend	J	T					
41. -- XOM		None			Sold	02/12/18	J		
42. -- PX	A	Dividend			Merged (with line 64)	10/31/18	J		
43. -- IBM	A	Dividend			Sold	10/15/18	J		
44. -- SLB	A	Dividend			Sold	12/21/18	J		
45. -- TMO	A	Dividend	J	T					
46. -- LLL	A	Dividend	J	T					
47. -- MCD	A	Dividend	J	T					
48. -- PKG	A	Dividend			Sold	10/10/18	J	B	
49. -- AGN	A	Dividend	J	T					
50. -- GOOG		None	J	T					
51. -- NSRGY	A	Dividend	J	T					

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52. -- WFC	A	Dividend	J	T					
53. -- CMCSA	A	Dividend	J	T	Buy (add'l)	5/17/18	J		
54. -- DLTR		None	J	T	Buy (add'l)	9/7/18	J		
55. -- LIMAF	A	Dividend			Sold	11/30/18	J		
56. -- CHTR		None	J	T	Buy (add'l)	5/17/18	J		
57. -- HCMLF		None	J	T	Buy (add'l)	8/7/18	J		
58. -- ORCL	A	Dividend	J	T					
59. -- CVX	A	Dividend	J	T	Buy	2/12/18	J		
60. -- DWDP	A	Dividend	J	T	Buy	1/19/18	J		
61.					Buy (add'l)	5/7/18	J		
62.					Buy (add'l)	8/7/18	J		
63.					Sold (part)	12/5/18	J		
64. -- LIN		None	J	T	Open	10/31/18	J		
65. -- TEL		None	J	T	Buy	11/30/18	J		
66. -- TXN		None	J	T	Buy	12/3/18	J		
67. Charles Schwab Simplified Employee Plan (H)									
68. -- Vanguard Total Stock Market ETF		None	J	T					

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69. -- Cash and money market		None	J	T					
70. Charles Schwab Brokerage Account (H)									
71. --Schwab Value Advantage Money Market Fund	A	Dividend	M	T					
72. -- LOW	A	Dividend	K	T	Sold (part)	10/12/18	K	E	
73. -- ABC	A	Dividend	K	T	Sold (part)	1/5/18	K	E	
74. -- BDX	A	Dividend	L	T					
75. -- PNC	B	Dividend	L	T					
76. -- PFE	B	Dividend	L	T					
77. -- MA	A	Dividend	L	T					
78. -- ETN	B	Dividend	L	T					
79. -- PEP	B	Dividend	L	T					
80. -- RSG	B	Dividend	L	T					
81. -- BCE	B	Dividend	K	T					
82. -- JNJ	B	Dividend	L	T					
83. -- CL	B	Dividend	K	T					
84. -- UN	B	Dividend	L	T					
85. -- MSFT	B	Dividend	M	T					

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86. -- SLB	A	Dividend			Sold	12/3/18	K		
87. -- UPS	B	Dividend	K	T	Sold (part)	10/15/18	J	C	
88. -- TMO	A	Dividend	L	T					
89. -- LLL	B	Dividend	L	T					
90. -- XOM	B	Dividend	K	T	Sold (part)	2/12/18	K		
91. -- CAT	B	Dividend	K	T					
92. -- MCD	B	Dividend	K	T					
93. -- IBM	A	Dividend			Sold	10/15/18	K	D	
94. -- PX	A	Dividend			Merged (with line 120)	10/31/18	K		
95. -- PKG	A	Dividend			Sold (part)	1/19/18	J	D	
96.					Sold	10/10/18	K	D	
97. -- WFC	B	Dividend	K	T					
98. -- AGN	A				Buy (add'l)	8/16/18	J		
99.					Sold	12/14/18	K		
100. -- GOOG		None	L	T					
101. -- NSRGY	A	Dividend	K	T					
102. -- CHTR		None	K	T	Buy (add'l)	5/17/18	J		

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103.					Sold (part)	6/21/18	J		
104. -- CMCSA	A	Dividend	K	T	Buy (add'l)	5/17/18	K		
105.					Sold (part)	6/22/18	J		
106. -- DLTR		None	K	T	Buy (add'l)	9/7/18	K		
107. -- ORDF		None			Buy (add'l)	8/7/18	K		
108.					Sold (part)	11/9/18	K		
109.					Sold	12/17/18	K		
110. -- ORCL	A	Dividend	L	T					
111. -- LIMAF	A	Dividend			Buy (add'l)	8/16/18	J		
112.					Sold	11/30/18	K		
113. -- TJX		None			Sold	1/5/18	K	B	
114. -- CVX	A	Dividend	K	T	Buy	2/12/18	K		
115. -- DWDP	A	Dividend	K	T	Buy	1/19/18	K		
116.					Buy (add'l)	5/7/18	J		
117.					Buy (add'l)	8/7/18	J		
118.					Sold (part)	11/9/18	J		
119.					Buy (add'l)	12/21/18	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 H2 ~More than \$5,000,000	E ~\$15,001 - \$50,000
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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. -- LIN	A	Dividend	K	T	Open	10/31/18	K		
121. -- TXN		None	K	T	Buy	12/3/18	K		
122. -- TEL		None	K	T	Buy	11/30/18	K		
123. Ardent Companies (commercial investments)	E	Int./Div.	N	T	Buy (add'l)	6/26/18	K		
124.					Buy (add'l)	12/7/18	K		
125. Crowdstreet (H)									
126. -- KEX PDX LLC	A	Interest	K		Buy	5/25/18	K		
127. -- Trails at Hunter Pointe	A	Interest	L		Buy	11/19/18	K		
128. -- Peloton Residences		None			Buy	9/5/18	K		
129. -- BV Multifamily Fund I	A	Interest	J		Buy	9/13/18	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 \$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

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Name of Person Reporting

Beckerman, Stacie F.

Date of Report

08/01/2019

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

In Section VII, Lines 42, 64, 94, and 120, please note that PX merged with LIN on 10/31/18. The codes in the PX rows accurately reflect that I disposed of PX shares via a merger (and therefore I no longer hold those shares), but there was no merger option for share acquisition of LIN shares. Instead, I chose the "open" code.

FINANCIAL DISCLOSURE REPORT

Page 13 of 13

Name of Person Reporting

Beckerman, Stacie F.

Date of Report

08/01/2019

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/ Stacie F. Beckerman

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
Administrative Office of the United States Courts
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Washington, D.C. 20544