

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2017

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) Bohm, Jeffrey E.	2. Court or Organization U.S. Bankruptcy Court	3. Date of Report 02/03/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Bankruptcy Judge - Active Status	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☒ Amended Report	6. Reporting Period 01/01/2017 to 12/31/2017
7. Chambers or Office Address 6202 Bob Casey Fed Courthouse 515 Rusk Street Houston, Texas 77002		
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.	Trustee	Trust Account #1
2.	Trustee	Trust Account #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.)*

<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. 2017	Employees Retirement System of Texas - Retirement
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. State Bar of Texas	May 31 - June 1, 2017	San Antonio, TX	Non-FJC educational seminar or program	Lodging, Mileage
2. Oklahoma State University	November 14-16, 2017	Stillwater, OK	Speech & guidance to students regarding law matters	Airfare, Lodging, Meals
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.	Chase Southwest Airlines VISA	Credit Card	K
2.	Northwestern Whole Life Insurance Policy	Whole Life Insurance Policy Loan	K
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. University Federal Credit Union accounts	A	Interest	K	T					
2. Texas Health Credit Union account	A	Interest	J	T					
3. Wells Fargo Bank, N.A. accounts	A	Interest	K	T					
4. Bank of America, N.A. account	A	Interest	K	T					
5. Duke Energy Corp. common (DRIP Shares)	A	Dividend	J	T					
6. Glaxosmithkline PLC com (DRIP Shares)	A	Dividend	J	T					
7. Whole Foods Mkt Inc. common	A	Dividend			Sold	09/29/17	J	D	
8. T Rowe Price Growth Stock Fund	E	Dividend	N	T					
9. IRA # 1 (H)									
10. - University Federal Credit Union - Cash Account	A	Interest	J	T					
11. IRA # 2 (H)									
12. - University Federal Credit Union - Cash Account	A	Interest	J	T					
13. IRA # 3 (H)									
14. - Fidelity Government Cash Reserves (formerly Cash & Money Mkt Funds)	A	Interest	J	T					
15. - Templeton Global Bond Fund Advisor Class	A	Dividend	J	T					
16. - American Funds: The Growth Fund of America CI F3 (formerly CI F2)	A	Dividend	J	T					
17. - Carillon Eagle Small Cap Growth Fd CI 1 (formerly Eagle SCGFd CIA)	A	Dividend	J	T					

1. Income Gain Codes:	A = \$1,000 or less (See Columns B1 and D4)	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	F = \$50,001 - \$100,000 J = \$15,000 or less (See Columns C1 and D3)	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes	N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000 (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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18. - American Funds: Europacific Growth Fd Class F3 (formerly CI F2)	A	Dividend	J	T					
19. - Gabelli Ent Mgr & Acq Fd CI Y (formerly CI A)	A	Dividend	J	T					
20. - Invesco Intl Growth Fund CI Y	A	Dividend	J	T					
21. - Fidelity Advisor New Insights Fd CI I	A	Dividend	J	T					
22. - Gateway Fd CI Y	A	Dividend	J	T					
23. - MFS Mid Cap Value Fund Class I	A	Dividend	J	T					
24. - Delaware Diversified Incm Fd CI I	A	Dividend	J	T					
25. - Doubleline Total Return Bond Fd CI I	A	Dividend	J	T					
26. - First Eagle Overseas Class I	A	Dividend	J	T					
27. - Invesco Developing Markets CI Y	A	Dividend	J	T					
28. - Invesco European Growth Fund Class Y	A	Dividend	J	T					
29. - JPMorgan High Yield Bond Fund Select CI	A	Dividend	J	T					
30. - Loomis Sayles Bond Instl	A	Dividend	J	T					
31. - MFS Emerging Markets Debt Fund CI I	A	Dividend	J	T					
32. - MFS International New Discovery CI I	A	Dividend	J	T					
33. - Nuveen Large-Cap Value Fund Class I	B	Dividend	J	T					
34. - SPDR S&P 500 ETF Turst Unit Ser 1 S&P	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. - Franklin Templeton Gbl Currency Adv Cl	A	Dividend	J	T					
36. - Thornburg Intl Value Cl Instl	A	Dividend	J	T					
37. - Undiscovered Mgrs Behavior Value Cl L	A	Dividend	J	T					
38. - Van Eck Global Hard Assets Fund Y		None	J	T					
39. - Voya Global Real Estate Class I	A	Dividend	J	T					
40. - Voya Mid Cap Opportunities Cl I	A	Dividend	J	T					
41. IRA #4 (H)									
42. - Ameriprise Insured Money Market	A	Interest	J	T					
43. - Invesco Real Estate Cl Y (formerly Cl A)	A	Dividend	J	T					
44. - Oppenheimer Funds:Opp Mid Cap Value - Y (formerly Value - A)	A	Dividend	J	T					
45. - Invesco Val Opps Cl Y (formerly Cl A)	A	Dividend	J	T					
46. - MFS Family of Funds:MFS Utilities - Cl I (formerly Cl A)	A	Dividend			Sold	05/05/17	J	C	
47. - iShares Transportation Average ETF	A	Dividend	J	T					
48. - iShares U S Consumer Services ETF	A	Dividend	K	T					
49. - iShares U S Healthcare ETF	A	Dividend	J	T					
50. - iShares U S Pharmaceuticals ETF	A	Dividend	J	T					
51. - iShares Select Dividend ETF	A	Dividend	K	T	Buy	05/11/17	J		

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52. IRA # 5 (H)									
53. - RVS Retirement Advisor Advantg 4 Var Ann		None	L	T					
54. 457 Deferred Compensation Plan at State of Texas		None	K	T					
55. 401K at State of Texas	D	Dividend	O	T					
56. RiverSource Variable Univ Life Insurance Policy (see part VIII)		None	L	T					
57. Northwestern Whole Life Insurance Policy	C	Dividend	M	T					
58. Whirlpool Corp. common	A	Dividend	J	T					
59. Pfizer Inc common	A	Dividend	J	T					
60. IRA # 8 (H) (see part VIII)									
61. - Fidelity Advisor New Insights Fund Cl I	D	Dividend	M	T					
62. - Invesco Sm Cap Discovery Fd (formerly Cl A)	C	Dividend	K	T					
63. - Doubleline Total Return Bd Fd Cl I	A	Dividend	K	T					
64. - Bank Deposit Sweep Program	A	Interest	K	T					
65. - Meridian Growth Fund Investor (formerly Fund Legacy)	B	Dividend	K	T					
66. - Nuveen Large Cap Value Fd Cl I	D	Dividend	M	T					
67. - Alger Spectra Fund Cl Z (formerly Cl I)	B	Dividend	K	T					
68. - Delaware Diversified Incm Fd Cl I	B	Dividend	K	T					

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69. - First Eagle Overseas Class I	A	Dividend	K	T					
70. - Franklin Templeton Gbl Currency Adv Cl	A	Dividend	J	T					
71. - Gabelli Enterprise Mergers & Acq Fd Cl Y	A	Dividend	K	T					
72. - Gateway Fund Class Y	A	Dividend	K	T					
73. - Invesco Small Cap Value Fd Cl Y		None			Sold	03/08/17	K	D	
74. - iShares Russell 2000 Value ETF	A	Dividend	K	T					
75. - JPMorgan High Yield Bond Fund Cl I (formerly Select Cl)	A	Dividend	J	T					
76. - Loomis Sayles Bond Instl	B	Dividend	K	T					
77. - MFS Mid Cap Value Fund Cl I	A	Dividend	K	T					
78. - Nuveen Symphony Flt Rate Income Cl I	A	Dividend	J	T					
79. - Sector SPDR Tr Shs Ben Int Consumer Staples	B	Dividend	L	T					
80. - SPDR S&P 500 ETF Trust Unit Ser 1 S&P	A	Dividend	K	T	Sold (part)	03/08/17	L	D	
81. - SPDR Ser Tr S&P Divid ETF	A	Dividend			Sold	03/08/17	L	D	
82. - Van Eck Global Hard Assets Fund Y		None	K	T					
83. - Vanguard Bd Index Fd Inc Total Bd Market ETF	A	Dividend	K	T					
84. - VOYA Global Real Estate Class I	C	Dividend	K	T					
85. - Invesco Developing Markets CL Y	A	Dividend	L	T	Buy	03/08/17	L		

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86. - Invesco Intl Growth Fund Class Y	B	Dividend	K	T	Buy	03/08/17	K		
87. - T Rowe Price Intl Value Equity Cl 1	B	Dividend	K	T	Buy	03/06/17	K		
88. InvenTrust Properties Corp	A	Dividend	J	T					
89. Powell Mineral Trust - (see part VIII)	F	Distribution	J	W					
90. IRA #9 (H) (see part VIII)									
91. - Community Natl Bank account (see part VIII)	A	Interest	J	T	Distributed (part)	09/19/17	J		
92. - CNL Lifestyle Prop Inc: (REIT) (see part VIII)	D	Dividend			Sold	12/20/17	J		
93. - FS Energy & Power Fund	B	Dividend	K	T					
94. - EPR Properties common (see part VIII)	A	Dividend	J	T	Buy	04/20/17	J		
95.					Sold (part)	05/02/17	J		
96. Trust Acct # 1 - Trustee (H)									
97. - Trust #1 Brokerage Acct (H)									
98. - Morgan Stanley Private Bank NA Bk Dep (formerly MSSB Ca Dep Mkt Fd)	A	Interest	J	T	Distributed (part)	10/18/17	K		
99. Trust Acct #2 - Trustee & Beneficiary (H)									
100. - JPMorgan Chase Bank, N.A. Account	A	Interest	J	T	Distributed (part)	10/12/17	J		
101.					Distributed (part)	10/12/17	J		
102.					Distributed (part)	10/12/17	K		

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103. - Jackson Natl Life Ins Co Inc:Pers L - IRA Annuity	E	Int./Div.	N	T	Distributed (part)	10/01/17	K		
104. - Pacific Life IRA Annuity: Pacific Innov Sel - IRA Annty	D	Int./Div.	M	T	Distributed (part)	10/01/17	J		
105. T Rowe Price Intl Value Equity (formerly Intl Growth & Income Fd)	A	Dividend	J	T					
106. Brokerage Account #1 (H)									
107. - MFB Northern Funds US Gov't Money Mkt Fd (formerly Money Mkt Fd)	A	Dividend	K	T					
108. - MFB Northern Fds Stk Index Fd	C	Dividend	M	T	Sold (part)	01/20/17	J	A	
109.					Sold (part)	03/16/17	J	B	
110.					Sold (part)	04/20/17	J	C	
111.					Sold (part)	07/20/17	J	A	
112. - MFB Northern Fds Small Cap Index Fd	A	Dividend	J	T	Sold (part)	01/20/17	J	A	
113.					Buy (add'l)	03/16/17	J		
114.					Sold (part)	04/20/17	J	A	
115.					Sold (part)	07/20/17	J	A	
116. - MFB Northern Equity Index Fds Intl EQT Index (formerly Intl Eq Ind)	C	Dividend	M	T	Buy (add'l)	01/20/17	J		
117.					Sold (part)	03/16/17	J	A	
118.					Buy (add'l)	04/20/17	J		
119.					Buy (add'l)	06/15/17	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
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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Bohm, Jeffrey E.

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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.					Buy (add'l)	07/20/17	J		
121. - MFB Northern Fds Emerging Mkts Equity Index Fd	B	Dividend	L	T	Sold (part)	01/20/17	J		
122.					Buy (add'l)	03/16/17	J		
123.					Sold (part)	04/20/17	J		
124.					Buy (add'l)	07/20/17	J		
125.					Buy (add'l)	11/16/17	J		
126. - MFB Northern High Yield Fixed Income Fd	C	Dividend	K	T	Sold (part)	01/20/17	J		
127.					Sold (part)	03/16/17	J		
128.					Sold (part)	04/20/17	J	A	
129.					Buy (add'l)	07/20/17	J		
130.					Sold (part)	11/16/17	J	A	
131. - MFB Northern Fds Global Real Estate Index Fd	A	Dividend	J	T	Buy (add'l)	01/20/17	J		
132.					Buy (add'l)	03/16/17	J		
133.					Sold (part)	04/20/17	J	A	
134.					Sold (part)	07/20/17	J	B	
135. - MFB Northern Fds Bd Index Fd	C	Dividend	M	T	Sold (part)	01/20/17	J		
136.					Buy (add'l)	03/16/17	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
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 \$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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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.					Buy (add'l)	04/20/17	J		
138.					Sold (part)	06/15/17	J		
139.					Buy (add'l)	07/20/17	J		
140.					Buy (add'l)	11/16/17	J		
141. - MFB Northern Equity Index Fds Mid Cap Index (formerly MidCap IndFd)	B	Dividend	K	T	Sold (part)	01/20/17	J	A	
142.					Sold (part)	03/16/17	J	A	
143.					Sold (part)	04/20/17	J	A	
144.					Sold (part)	07/20/17	J	A	
145. - MFC Flexshs Tr Morningstar Gbl Upstream Natl Res Indx Fd	A	Dividend	K	T	Sold (part)	01/20/17	J		
146.					Buy (add'l)	03/16/17	J		
147.					Sold (part)	04/20/17	J	A	
148.					Sold (part)	06/15/17	J	A	
149.					Buy (add'l)	07/20/17	J		
150. - MFC Flexshares Tr Iboxx 3 Yr Target Duration Tips Indx Fd	A	Dividend	K	T	Buy (add'l)	01/20/17	J		
151.					Buy (add'l)	03/16/17	J		
152.					Buy (add'l)	07/20/17	J		
153. - MFC Flexshares Tr STOXX Global Broad Infrastructure Index Fd	A	Dividend	J	T	Buy (add'l)	01/20/17	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
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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Bohm, Jeffrey E.

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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 (part)	03/16/17	J	A	
155.					Sold (part)	04/20/17	J	A	
156.					Sold (part)	07/20/17	J	A	
157. - MFO DFA Intl Small Co Portfolio Fd	A	Dividend	K	T	Buy	03/16/17	J		
158.					Buy (add'l)	04/20/17	J		
159.					Buy (add'l)	06/15/17	J		
160.					Buy (add'l)	07/20/17	J		
161.					Buy (add'l)	12/15/17	J		
162.					Buy (add'l)	12/15/17	J		
163. Wayne State Univ Retirement Savings (see part VIII)		None			Distributed	07/07/17	K		
164. Brokerage Account #2 (H)									
165. - Morgan Stanley Private Bank NA Bk Deps. (frm. cash deps. & mmkt)		None	J	T					
166. - Harris Assoc Inv Tr: Oakmark I (formerly Oakmark Fund CI I)	A	Dividend	K	T	Sold (part)	01/11/17	J	A	
167.					Sold (part)	04/12/17	J	A	
168. - Prudential Jennison Growth Z	A	Dividend	K	T					
169. - Blackrock Low Dur Bd Inst Inv	A	Dividend	J	T					
170. - Blackrock Inflat Prot Bond I	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
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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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)
171. - Transamerica Life - B Shares Annuity		None	M	T					
172. - Blackrock Hi Yield Bd PTF Inst	A	Dividend	J	T	Sold (part)	07/12/17	J	A	
173.					Sold (part)	07/12/17	J	A	
174.					Sold (part)	10/10/17	J	A	
175. - Delaware SMID Cap Growth Inst	A	Dividend	J	T					
176. - First Eagle Overseas I	A	Dividend	K	T					
177. - Hartford Midcap I	A	Dividend	J	T					
178. - JP Morgan Mid Cap Value I (formerly Value S)	A	Dividend	J	T					
179. - Matthews Asian Japan Inv	A	Dividend	J	T					
180. - PIMCO Short Term P	A	Dividend	J	T					
181. - Virtus Kar Sm-Cap Value I (formerly Virtus Quality Sm Cap I)	A	Dividend	J	T					
182. - Wells Fargo Emerg Mrk Eq Inc I	A	Dividend	J	T					
183. - Western Asset Core Plus Bd I	A	Dividend	J	T					
184. Lucie Rie Pottery (see part VIII)		None	J	W					
185. Brokerage Acct #3 (H)									
186. - Ameriprise Insured Money Market	A	Interest	J	T					
187. - iShares U S Consumer Services ETF	A	Dividend	K	T	Buy (add'l)	10/12/17	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
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 \$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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Bohm, Jeffrey E.

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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. - iShares U S Medical Devices ETF	A	Dividend	K	T	Buy (add'l)	10/12/17	J		
189. - iShares U S Pharmaceuticals ETF	A	Dividend	K	T	Buy (add'l)	10/12/17	J		
190. - SPDR Dow Jones Industrial Average ETF	A	Dividend	K	T	Buy (add'l)	10/12/17	J		
191.					Buy (add'l)	11/28/17	J		
192. - Sector Consumer Staples Select Sector SPDR ETF	A	Dividend	K	T	Buy (add'l)	10/12/17	J		
193. - iShares Select Dividend ETF	A	Dividend	K	T	Buy	07/24/17	J		
194.					Buy (add'l)	08/10/17	J		
195.					Buy (add'l)	08/24/17	J		
196.					Buy (add'l)	10/12/17	J		
197.					Buy (add'l)	11/13/17	J		
198.					Buy (add'l)	11/28/17	K		
199.					Buy (add'l)	12/22/17	J		
200. - iShares U S Aerospace & Defense ETF	A	Dividend	K	T	Buy	07/24/17	J		
201.					Buy (add'l)	08/10/17	J		
202.					Buy (add'l)	08/24/17	J		
203.					Buy (add'l)	10/12/17	J		
204.					Buy (add'l)	11/13/17	J		

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	
	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
3. Value Method Codes	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
(See Column C2)	U = Book Value	V = Other	W = Estimated		

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Bohm, Jeffrey E.

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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.)

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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)
205.					Buy (add'l)	11/28/17	J		
206. - iShares U S Consumer Goods ETF	A	Dividend	K	T	Buy	07/24/17	J		
207.					Buy (add'l)	08/10/17	J		
208.					Buy (add'l)	08/24/17	J		
209.					Buy (add'l)	10/12/17	J		
210.					Buy (add'l)	11/13/17	J		
211.					Buy (add'l)	11/28/17	K		
212. - iShares Core Moderate Allocation ETF	A	Dividend	J	T	Buy	12/18/17	K		
213. Brokerage Acct #4 (H)									
214. - Bank Deposit Sweep Program	A	Interest			Closed	10/02/17	J		
215. - Whole Food Markets Inc common	A	Dividend			Sold	08/28/17	J	D	
216. Xenia Hotels & Resorts Inc	A	Dividend	J	T					
217. Note Receivable - Kohavi	B	Interest	L	U					
218. First National Bank Scotia accts (see part VIII)	A	Interest	L	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 = \$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.)*

(1) Part VII, Page 7, line 56: The RiverSource Variable Universal Life Insurance Policy does not directly own any publicly-traded equity investments. The policy has investment units, not shares. According to the prospectus issued for the RiverSource Variable Universal Life Insurance Policy:

"A fund underlying the policy in which a subaccount invests may have a name, portfolio manager, objectives, strategies and characteristics that are the same or substantially similar to those of a publicly-traded retail mutual fund. Despite these similarities, an underlying fund is not the same as any publicly traded retail mutual fund. Each underlying fund will have its own unique portfolio holdings, fees, operating expenses and operating results. The results of each underlying fund may differ significantly from any publicly-traded retail mutual fund."

The investment units are not direct ownership in any actual publicly-traded retail mutual funds. Instead, the investment units are for purposes of participation in cloned mutual funds, set up and administered by the insurance company and its investment personnel, to mirror the performance of actual publicly-traded mutual funds.

The cloned publicly-traded mutual funds that have been chosen for this policy are as follows:

Am Century VP Value - Value of J

Columbia VP Dividend Opp Cl3 - Value of K

Columbia VP Balance Fd Cl3 - Value of J

Columbia VP MidCap Val Cl3 - Value of J

Franklin Real Est VIP - Value of J

MFS Utilities Series - Value of J

Third Ave Value Port - Value of J

Fid VIP Contrafd Cl2 - Value of J

Invesco VI Comstck Ser II - Value of J

(2) Part VII, Page 7, line 60 and Page 9, line 90: IRAs #8 and #9 follow IRA # 6 as IRAs #7 and #8 were closed in 2016.

(3) Part VII, Page 9, line 89: My Wife is a beneficiary of the Powell Mineral Trust, a trust created by members of her family to hold oil and gas mineral interests. The Trust still owns additional oil and gas and coal deposit mineral interests in Waynesburg, PA. The trust sold the majority of its oil and gas mineral rights in 2017.

(4) Part VII, Page 9, line 91: Cash in this IRA account valued at "J" was transferred to IRA #8 on 9/19/17.

(5) Part VII, Page 9, line 92 and 94: CNL Lifestyle Properties Inc. (REIT) was liquidated on 12/20/17. An interim liquidating dividend of cash and EPR Properties common stock valued at "J" was distributed on 4/20/17. The final liquidating distribution of cash was paid on 12/15/17 in the amount of "J". The CNL Lifestyles Properties REIT was terminated on 12/20/17 by the administrator. A loss was incurred on the disposition.

(6) Part VII, Page 13, line 163: This was a retirement account inherited from my father. The funds were fully distributed in 2017.

(7) Part VII, page 14, line 184: Trust #2 distributed Lucie Rie pottery, a family heirloom, to me in 2011. No property was sold in 2017.

(8) Part VII, page 16, line 218: These accounts belong to my sibling. They are listed on this report only because I have signature authority on my sibling's accounts.

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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/ Jeffrey E. Bohm**

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
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544