

# FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2018

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

|                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                          |                                                                  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| <b>1. Person Reporting</b> (last name, first, middle initial)<br><br>Burris, Helen E.                                                                                                                     | <b>2. Court or Organization</b><br><br>US Bankruptcy Court, DSC                                                                                                                                                                                                                          | <b>3. Date of Report</b><br><br>05/15/2019                       |
| <b>4. Title</b> (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)<br><br>US Bankruptcy Judge- Full time                                                | <b>5a. Report Type</b> (check appropriate type)<br><input type="checkbox"/> Nomination <input type="checkbox"/> Date<br><input type="checkbox"/> Initial <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Final<br><b>5b.</b> <input type="checkbox"/> Amended Report | <b>6. Reporting Period</b><br><br>01/01/2018<br>to<br>12/31/2018 |
| <b>7. Chambers or Office Address</b><br><br>Federal Courthouse<br>201 Magnolia Street<br>Spartanburg, SC 29306                                                                                            |                                                                                                                                                                                                                                                                                          |                                                                  |
| <p align="center"><b>IMPORTANT NOTES:</b> The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.</p> |                                                                                                                                                                                                                                                                                          |                                                                  |

## I. POSITIONS. (Reporting individual only; see pp. 9-13 of filing instructions.)

☒ NONE (No reportable positions.)

POSITION

NAME OF ORGANIZATION/ENTITY

|    |  |  |
|----|--|--|
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| 5. |  |  |

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

☒ NONE (No reportable agreements.)

DATE

PARTIES AND TERMS

|    |  |
|----|--|
| 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><br>(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     | The Law Office of Eric K. Englehardt, LLC (this entity owns 50% of Wilson & Englehardt, LLC)(attorneys) |
| 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. South Carolina Bar                           | 01/18/2018 to<br>01/19/2018 | Kiawah Island, SC | CLE/Bar meeting | registration waived                |
| 2. South Carolina Bankruptcy<br>Law Association | 05/04/2018 to<br>05/06/2018 | Wild Dunes, SC    | CLE/ speaker    | lodging, food, registration waived |
| 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. | SC State Court of Appeals judge and spouse                                                   | 2 night's lodging at their personal vacation home to attend SC Bar Convention | \$400.00     |
| 2. | National College of Probate Judges (a reimbursement to spouse, amount listed is total value) | lodging for spouse to speak at conference, refreshments, I traveled with him  | \$700.00     |
| 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. | American Express                     | credit card spouse                    | K                 |
| 2. | U.S. Department of Education/Navient | student loan (dependent's obligation) | K                 |
| 3. | U.S. Department of Education/Nelnet  | student loan (dependent's obligation) | K                 |
| 4. |                                      |                                       |                   |
| 5. |                                      |                                       |                   |

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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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 1. South State Bank - Accounts                                                                                              | A                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 2. Allianz 222 Annuity (H)                                                                                                  |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 3. -AnPtPw/cap- Bloomberg US Dynamic<br>Balance Index II                                                                    | A                                       | Interest                                      | L                                               | T                                         | Sold<br>(part)                                  | 03/02/18                | L                               |                                | to next 2 lines                                                   |
| 4. -MoSum-Nasdaq-100Index                                                                                                   | A                                       | Interest                                      | L                                               | T                                         | Buy                                             | 03/02/18                | L                               |                                |                                                                   |
| 5. -AnPtPw/spread-PIMCO Tactical Balanced<br>Index                                                                          | A                                       | Interest                                      | L                                               | T                                         | Buy                                             | 03/02/18                | L                               |                                |                                                                   |
| 6. NW Mutual Whole Life Cash Value #1                                                                                       | A                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 7. 401K Fidelity Freedom 2030 Fund                                                                                          | D                                       | Int./Div.                                     |                                                 |                                           | Distributed                                     | 11/07/18                | N                               |                                | rollover to next line                                             |
| 8. Fidelity Freedom Fund 2030 (FFEX)                                                                                        | E                                       | Int./Div.                                     | N                                               | T                                         | Buy                                             | 11/07/18                | N                               |                                |                                                                   |
| 9. Presidio Property Trust, Inc.                                                                                            | A                                       | Int./Div.                                     | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 10. Future Scholar529 College Savings Plan-FS<br>Mod Conserv (no control) (H)                                               | A                                       | Int./Div.                                     |                                                 |                                           | Distributed                                     | 04/12/18                | J                               |                                |                                                                   |
| 11. Rental Property #1 Greenville SC                                                                                        | D                                       | Rent                                          | L                                               | W                                         |                                                 |                         |                                 |                                |                                                                   |
| 12. Future Scholar 529 College Savings Plan (2)<br>(H)                                                                      |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 13. -FS Mod Conserv (no control)                                                                                            | A                                       | Int./Div.                                     | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 14. -cont'd                                                                                                                 |                                         |                                               |                                                 |                                           | Distributed<br>(part)                           | 04/27/18                | J                               |                                |                                                                   |
| 15. -cont'd                                                                                                                 |                                         |                                               |                                                 |                                           | Distributed<br>(part)                           | 06/15/18                | J                               |                                |                                                                   |
| 16. -cont'd                                                                                                                 |                                         |                                               |                                                 |                                           | Distributed<br>(part)                           | 08/16/18                | J                               |                                |                                                                   |
| 17. -cont'd                                                                                                                 |                                         |                                               |                                                 |                                           | Buy<br>(add'l)                                  | 12/03/18                | 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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## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                                               |   |           |   |   |                       |          |   |  |  |
|-------------------------------------------------------------------------------|---|-----------|---|---|-----------------------|----------|---|--|--|
| 18. -cont'd                                                                   |   |           |   |   | Distributed<br>(part) | 12/13/18 | J |  |  |
| 19. -FS Mod Growth Port Static (no control)                                   | A | Int./Div. | J | T | Buy                   | 04/12/18 | J |  |  |
| 20. -cont'd                                                                   |   |           |   |   | Distributed<br>(part) | 04/27/18 | J |  |  |
| 21. -cont'd                                                                   |   |           |   |   | Distributed<br>(part) | 06/15/18 | J |  |  |
| 22. -cont'd                                                                   |   |           |   |   | Distributed<br>(part) | 08/16/18 | J |  |  |
| 23. -cont'd                                                                   |   |           |   |   | Buy<br>(add'l)        | 12/03/18 | J |  |  |
| 24. -cont'd                                                                   |   |           |   |   | Distributed<br>(part) | 12/13/18 | J |  |  |
| 25. TD Ameritrade Institutional (H)                                           |   |           |   |   |                       |          |   |  |  |
| 26. -iShares Intl Developed Real Estate ETF<br>(IFGL)                         | A | Int./Div. |   |   | Sold                  | 02/21/18 | K |  |  |
| 27. -iShares Core S&P Mid-Cap ETF (IJH)                                       | A | Int./Div. | K | T | Buy<br>(add'l)        | 10/25/18 | J |  |  |
| 28. -iShares Core S&P Small-Cap ETF (IJR)                                     | A | Int./Div. | J | T |                       |          |   |  |  |
| 29. -iShares Floating Rate Bond ETF (FLOT)                                    | A | Int./Div. | J | T | Sold<br>(part)        | 05/30/18 | J |  |  |
| 30. -cont'd                                                                   |   |           |   |   | Sold<br>(part)        | 10/25/18 | J |  |  |
| 31. -Powershares Var Rate PFD POR ETF<br>(VRP) name change - Invesco Exchange | A | Int./Div. |   |   | Sold                  | 08/24/18 | J |  |  |
| 32. -Vanguard FTSE Developed Markets ETF<br>(VEA)                             | B | Int./Div. | K | T | Buy<br>(add'l)        | 02/21/18 | K |  |  |
| 33. -cont'd                                                                   |   |           |   |   | Buy<br>(add'l)        | 05/30/18 | J |  |  |
| 34. -cont'd                                                                   |   |           |   |   | Buy<br>(add'l)        | 08/24/18 | 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                 |                         |
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☐ NONE (No reportable income, assets, or transactions.)

| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                                             |   |           |   |   |                |          |   |  |  |
|-----------------------------------------------------------------------------|---|-----------|---|---|----------------|----------|---|--|--|
| 35. -cont'd                                                                 |   |           |   |   | Sold<br>(part) | 10/25/18 | J |  |  |
| 36. -Vanguard Emerging Markets ETF (VWO)                                    | A | Int./Div. | J | T |                |          |   |  |  |
| 37. -Vanguard Index Funds S&P 500 ETF (VOO)                                 | A | Int./Div. | K | T | Sold<br>(part) | 02/21/18 | J |  |  |
| 38. -cont'd                                                                 |   |           |   |   | Buy<br>(add'l) | 08/24/18 | J |  |  |
| 39. -cont'd                                                                 |   |           |   |   | Buy<br>(add'l) | 10/25/18 | J |  |  |
| 40. -SPDR Series Trust Short Term High Yield Bond ETF (SJNK)                | A | Int./Div. | J | T |                |          |   |  |  |
| 41. -Global X Funds MLP Index ETF                                           | A | Int./Div. |   |   | Sold           | 03/19/18 | J |  |  |
| 42. -Ishares 1-3 year credit BND ETF                                        | A | Int./Div. |   |   | Sold           | 01/19/18 | J |  |  |
| 43. -Fidelity Covington Trust MSCI Finance ETF (FNCL)                       | A | Int./Div. |   |   | Sold           | 10/25/18 | J |  |  |
| 44. -Ishares Core US Aggregate Bond ETF (AGG)                               | A | Int./Div. | J | T | Sold<br>(part) | 02/21/18 | J |  |  |
| 45. -cont'd                                                                 |   |           |   |   | Buy<br>(add'l) | 03/21/18 | J |  |  |
| 46. -ETFS TR BBG COMD K1 ETF (BCI)<br>name change Aberdeen Std Invests ETFS | A | Int./Div. | J | T | Buy            | 01/19/18 | J |  |  |
| 47. -cont'd                                                                 |   |           |   |   | Buy<br>(add'l) | 03/19/18 | J |  |  |
| 48. -Fidelity MSCI INFO TECH 1 ETF                                          | A | Int./Div. |   |   | Buy            | 02/21/18 | J |  |  |
| 49. -cont'd                                                                 |   |           |   |   | Sold<br>(part) | 08/24/18 | J |  |  |
| 50. -cont'd                                                                 |   |           |   |   | Sold           | 10/25/18 | J |  |  |
| 51. -SPDR FTSE PORTFOLIO INTRMD ETF (SPIB)                                  | A | Int./Div. | J | T | Buy            | 08/24/18 | J |  |  |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

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|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 52. -Vanec Vectors JP Morgan MKTS ETF (EMLC)                                                                                | A                                       | Int./Div.                                     | J                                               | T                                         | Buy                                             | 08/24/18                | J                               |                                |                                                                   |
| 53. Community National Bank IRA                                                                                             | A                                       | Interest                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 54. Griffin Inst Success RE FdCLC                                                                                           | A                                       | Int./Div.                                     | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 55. Buyout of partnership investment Turner Padget Graham&Laney                                                             |                                         | None                                          |                                                 |                                           | Distributed                                     | 10/03/18                | J                               |                                | paid in full by TPGL                                              |
| 56. 2nd home Boone, NC                                                                                                      | D                                       | Rent                                          | M                                               | W                                         |                                                 |                         |                                 |                                |                                                                   |
| 57. American Funds (H)                                                                                                      |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 58. -The Growth Fund of American C (305)                                                                                    | A                                       | Int./Div.                                     | J                                               | T                                         | Buy                                             | 04/16/18                | J                               |                                |                                                                   |
| 59. -Fundamental Investors C (310)                                                                                          | A                                       | Int./Div.                                     | J                                               | T                                         | Buy                                             | 04/16/18                | J                               |                                |                                                                   |
| 60. -American Balanced Funds C (311)                                                                                        | A                                       | Int./Div.                                     | J                                               | T                                         | Buy                                             | 04/16/18                | J                               |                                |                                                                   |
| 61. -New World Fund C (336)                                                                                                 | A                                       | Int./Div.                                     | J                                               | T                                         | Buy                                             | 04/16/18                | J                               |                                |                                                                   |
| 62. -Europacific Growth Fund C (316)                                                                                        | A                                       | Int./Div.                                     | J                                               | T                                         | Buy                                             | 04/16/18                | J                               |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

**FINANCIAL DISCLOSURE REPORT**

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Name of Person Reporting

Burris, Helen E.

Date of Report

05/15/2019

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

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Burris, Helen E.

Date of Report

05/15/2019

## 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/ **Helen E. Burris**

**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