

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2019

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) Taddonio, Gregory L.	2. Court or Organization U.S. Bankruptcy Court, Western District of Pennsylvania	3. Date of Report 05/06/2020
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Bankruptcy Judge - Active Full-Time	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final	6. Reporting Period 01/01/2019 to 12/31/2019
	5b. ☐ Amended Report	
7. Chambers or Office Address 5490 U.S. Steel Tower 600 Grant Street Pittsburgh, PA 15219		
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/Past President	Franklin Regional Band Fund
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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Name of Person Reporting

Taddonio, Gregory L.

Date of Report

05/06/2020

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. 2019	Alliance Physical Therapy and Rehabilitation - Wages
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.	National Conference of Bankruptcy Judges	03/25/2019 - 03/27/2019	Washington, DC	Legislative Committee Meeting	Lodging, Meals, Transportation, Parking
2.	Allegheny County Bar Association	06/13/2019	Champion, PA	ACBA Bench-Bar Conference	Registration
3.	National Conference of Bankruptcy Judges	10/29/2019 - 11/01/2019	Washington, DC	Annual Conference/Seminars/Meetings	Lodging, Meals, Transportation, Parking
4.					
5.					
6.					

Name of Person Reporting	Date of Report
Taddonio, Gregory L.	05/06/2020

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.			

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)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
1. American Funds 529 Coll Enroll(CENAX)	D	Int./Div.	N	T	Sold (part)	01/09/19	K	C	
2.					Buy (add'l)	01/10/19	J		
3.					Buy (add'l)	02/06/19	M		
4.					Sold (part)	03/06/19	J	A	
5.					Sold (part)	03/07/19	J	A	
6.					Buy (add'l)	04/17/19	J		
7.					Sold (part)	05/07/19	J	A	
8.					Sold (part)	06/27/19	J	A	
9.					Buy (add'l)	07/18/19	J		
10.					Sold (part)	07/19/19	J	A	
11.					Sold (part)	07/31/19	K	A	
12.					Sold (part)	08/05/19	K	C	
13.					Sold (part)	08/26/19	J	A	
14.					Sold (part)	09/13/19	J	A	
15.					Sold (part)	09/16/19	J	A	
16.					Sold (part)	10/16/19	J	A	
17.					Buy (add'l)	10/18/19	L		

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

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

T =Cash Market

E =\$15,001 - \$50,000

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)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
18.					Sold (part)	11/15/19	J	A	
19.					Sold (part)	11/20/19	J	A	
20.					Sold (part)	12/12/19	K	C	
21.					Sold (part)	12/16/19	J	A	
22.					Sold (part)	12/17/19	J	A	
23. American Funds – 2024 College Fund – 529 Fund (CFTAX)	C	Int./Div.	M	T	Buy (add'l)	01/10/19	J		
24.					Buy (add'l)	02/06/19	K		
25.					Buy (add'l)	07/18/19	J		
26.					Buy (add'l)	10/18/19	K		
27. American Funds Capital Income Builder Fund Class A (CAIBX)	C	Int./Div.	L	T					
28. American Funds Capital Income Builder 529A (CIRAX)	B	Int./Div.	K	T	Buy (add'l)	01/10/19	J		
29.					Buy (add'l)	02/06/19	K		
30.					Buy (add'l)	07/18/19	J		
31. American Funds Clearbridge Aggressive Growth Fund (SHRAX) (Y)									
32. American Funds Investment Company of America Class A (AIVSX)	C	Int./Div.	L	T					
33. American Funds New Perspective Fund Class A (ANWPX)	C	Int./Div.	M	T	Sold (part)	03/06/19	J	A	
34.					Sold (part)	11/04/19	K	C	

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

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

T =Cash Market

E =\$15,001 - \$50,000

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Name of Person Reporting

Taddonio, Gregory L.

Date of Report

05/06/2020

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)
35. American Funds New Perspective Fund 529A (CNPAX)	B	Int./Div.	K	T	Buy (add'l)	01/10/19	J		
36.					Buy (add'l)	02/06/19	K		
37.					Sold (part)	05/07/19	J	A	
38.					Buy (add'l)	07/18/19	J		
39.					Sold (part)	07/31/19	K	C	
40.					Sold (part)	10/18/19	K	D	
41. American Funds New World Class A (NEWFX)	B	Int./Div.	K	T	Sold (part)	05/21/19	J	A	
42. American Funds The Growth Fund of America A (AGTHX)	D	Int./Div.	M	T	Sold (part)	06/28/19	J	B	
43. American Funds The Growth Fund of America 529A (CGFAX)	B	Int./Div.	K	T	Buy (add'l)	01/10/19	J		
44.					Buy (add'l)	02/06/19	K		
45.					Buy (add'l)	07/18/19	J		
46.					Sold (part)	09/12/19	J	A	
47.					Sold (part)	10/18/19	L	D	
48. American Funds Washington Mutual Investors Fund (AWSHX)	D	Int./Div.	L	T	Sold (part)	04/18/19	J	A	
49. American Funds Washington Mutual Investors Fund 529A (CWMAX)	B	Int./Div.	J	T	Buy (add'l)	01/10/19	J		
50.					Buy (add'l)	02/06/19	K		
51.					Buy (add'l)	07/18/19	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	

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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 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)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
52.					Sold (part)	10/18/19	K	C	
53. American Funds Capital World Growth & Income Fund A (CWGIX)	A	Int./Div.	J	T					
54. Morgan Stanley Bank, N.A. f/k/a Morgan Stanley Money Market Account	A	Int./Div.	J	T					
55. PNC Bank, N.A. Accounts	A	Int./Div.	J	T					
56. American Balanced A (ABALX)	C	Int./Div.	L	T					
57. American Bd Fd of America A (ABNDX)	B	Int./Div.	L	T					
58. American Amcap A (AMCPX)	B	Int./Div.	L	T					
59. American Inc. Fd. Of America A (AMECX)	C	Int./Div.	L	T					
60. American Balanced Fundamental Inv A (ANCFX)	C	Int./Div.	L	T					
61. American Intl Growth & Income A (IGAAX)	B	Int./Div.	L	T					
62. American Smallcap World A (SMCWX)	B	Int./Div.	K	T					
63. American INTM Bd Fd of American (AIBAX)	A	Int./Div.	K	T					
64. American High Income Trust (AHITX)	A	Int./Div.	K	T	Buy	11/04/19	J		
65. American Cap World Bond A (CWBFX)	A	Int./Div.	K	T					
66. Strategic Bond A (ANBAX)	A	Int./Div.	K	T	Buy	11/04/19	K		

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

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Name of Person Reporting

Taddonio, Gregory L.

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

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Name of Person Reporting

Taddonio, Gregory L.

Date of Report

05/06/2020

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/ Gregory L. Taddonio**

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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One Columbus Circle, N.E.
Washington, D.C. 20544