

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) Bohm, Jeffrey E.	2. Court or Organization U.S. Bankruptcy Court	3. Date of Report 05/14/2019
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	6. Reporting Period 01/01/2018 to 12/31/2018
	5b. ☐ Amended Report	
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. 2018	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.				
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.	Chase Southwest Airlines VISA	Credit Card	J
2.	Northwestern Whole Life Insurance Policy	Whole Life Insurance Policy Loan	L
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)	(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. University Federal Credit Union accounts	A	Interest	K	T					
2. Texas Health Credit Union account	A	Interest			Closed	07/20/18	J		
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. T Rowe Price Growth Stock Fund	E	Dividend	N	T					
8. IRA # 1 (H)									
9. - University Federal Credit Union - Cash Account	A	Interest	J	T					
10. IRA # 2 (H)									
11. - University Federal Credit Union - Cash Account	A	Interest	J	T					
12. IRA # 3 (H)									
13. - Fidelity Government Cash Reserves	A	Interest	J	T					
14. - Templeton Global Bond Fund Advisor Class	A	Dividend	J	T					
15. - American Funds: The Growth Fund of America Cl F3	B	Dividend	J	T					
16. - Carillon Eagle Small Cap Growth Fd Cl I	A	Dividend	J	T					
17. - American Funds: Europacific Growth Fd Class F3	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	
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18. - Gabelli Ent Mgr & Acq Fd Cl Y	A	Dividend	J	T					
19. - Invesco Intl Growth Fund Cl Y	A	Dividend	J	T					
20. - Fidelity Advisor New Insights Fd Cl Z (frmly Cl I) (see part VIII)	A	Dividend	J	T					
21. - Gateway Fd Cl Y	A	Dividend	J	T					
22. - MFS Mid Cap Value Fund Class I	A	Dividend	J	T					
23. - Delaware Diversified Incm Fd Cl I	A	Dividend	J	T					
24. - Doubleline Total Return Bond Fd Cl I	A	Dividend	J	T					
25. - First Eagle Overseas Class I	A	Dividend	J	T					
26. - Invesco Developing Markets Cl Y	A	Dividend	J	T					
27. - Invesco European Growth Fund Class Y	A	Dividend	J	T					
28. - JPMorgan High Yield Bond Fund Select Cl	A	Dividend	J	T					
29. - Loomis Sayles Bond Instl	A	Dividend	J	T					
30. - MFS Emerging Markets Debt Fund Cl I	A	Dividend	J	T					
31. - MFS International New Discovery Cl I	A	Dividend	J	T					
32. - Nuveen Large-Cap Value Fund Class I	B	Dividend	J	T					
33. - SPDR S&P 500 ETF Turst Unit Ser 1 S&P	A	Dividend	J	T					
34. - Franklin Templeton Gbl Currency Adv Cl	A	Dividend	J	T					

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35. - Thornburg Intl Value Cl Instl	A	Dividend	J	T					
36. - Undiscovered Mgrs Behavior Value Cl L	A	Dividend	J	T					
37. - Van Eck Global Hard Assets Fund Y	A	Dividend	J	T					
38. - Voya Global Real Estate Class I	A	Dividend	J	T					
39. - Voya Mid Cap Opportunities Cl I	A	Dividend	J	T					
40. IRA #4 (H)									
41. - Wells Fargo Bank NA Sioux Falls SD (Ameriprise Insured Money Mkt)	A	Interest	J	T					
42. - Invesco Real Estate Cl Y	A	Dividend			Sold	04/04/18	J		
43. - Oppenheimer Funds:Opp Mid Cap Value - Y	A	Dividend			Sold	04/04/18	J	C	
44. - Invesco Val Opps Cl Y		None			Sold	04/04/18	J	B	
45. - iShares Transportation Average ETF	A	Dividend	J	T					
46. - iShares U S Consumer Services ETF	A	Dividend	K	T					
47. - iShares U S Healthcare ETF	A	Dividend	J	T					
48. - iShares U S Pharmaceuticals ETF	A	Dividend	J	T					
49. - iShares Select Dividend ETF	A	Dividend	J	T					
50. - iShares Core Moderate Allocation ETF	A	Dividend	J	T	Buy	04/18/18	J		
51. - SPDR Dow Jones Industrial Average ETF	A	Dividend	J	T	Buy	04/18/18	J		

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52. IRA # 5 (H)									
53. - RVS Retirement Advisor Advantg 4 Var Ann (see part VIII)		None			Closed	09/20/18	L		
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	K	T					
60. IRA # 8 (H) (see part VIII)									
61. - Fidelity Advisor New Insights Fund Cl Z (fmly Cl I) (see part VIII)	D	Dividend	L	T					
62. - Invesco Sm Cap Discovery Fd	C	Dividend	K	T					
63. - Doubleline Total Return Bd Fd Cl I	B	Dividend	K	T					
64. - American Express National Bank (Bank Deposit Sweep Program)	A	Interest	L	T					
65. - Meridian Growth Fund Investor	C	Dividend	K	T					
66. - Nuveen Large Cap Value Fd Cl I	E	Dividend	M	T					
67. - Alger Spectra Fund Cl Z	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	B	Dividend	K	T					
72. - Gateway Fund Class Y	A	Dividend	K	T					
73. - iShares Russell 2000 Value ETF	A	Dividend	K	T					
74. - JPMorgan High Yield Bond Fund Cl I	A	Dividend	J	T					
75. - Loomis Sayles Bond Instl	A	Dividend	K	T					
76. - MFS Mid Cap Value Fund Cl I	B	Dividend	K	T					
77. - Nuveen Symphony Flt Rate Income Cl I	A	Dividend	J	T					
78. - Sector SPDR Tr Shs Ben Int Consumer Staples	B	Dividend	K	T					
79. - SPDR S&P 500 ETF Trust Unit Ser 1 S&P	A	Dividend	K	T					
80. - Van Eck Global Hard Assets Fund Y		None			Sold	05/14/18	K	C	
81. - Vanguard Bd Index Fd Inc Total Bd Market ETF	B	Dividend	K	T					
82. - VOYA Global Real Estate Class I	C	Dividend	K	T					
83. - Invesco Developing Markets CL Y	B	Dividend	L	T					
84. - Invesco Intl Growth Fund Class Y	C	Dividend	K	T					
85. - T Rowe Price Intl Value Equity Cl I	A	Dividend	K	T					

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86. - EPR Properties common (see part VIII)	A	Dividend	J	T	Open	06/29/18	J		
87. InvenTrust Properties Corp	A	Dividend	J	T					
88. Powell Mineral Trust - (see part VIII)		None	J	W					
89. IRA #9 (H)									
90. - Community Natl Bank account (see part VIII)	A	Interest	J	T	Distributed (part)	05/14/18	J		
91. - FS Energy & Power Fund	B	Dividend	K	T					
92. - EPR Properties common (see part VIII)	A	Dividend			Closed	06/29/18	J		
93. Trust Acct # 1 - Trustee (H)									
94. - Trust #1 Brokerage Acct (H)									
95. - Morgan Stanley Private Bank NA Bk Dep	A	Interest	J	T	Distributed (part)	10/22/18	K		
96. Trust Acct #2 - Trustee & Beneficiary (H)									
97. - JPMorgan Chase Bank, N.A. Account	A	Interest	J	T	Distributed (part)	10/17/18	J		
98.					Distributed (part)	10/17/18	J		
99.					Distributed (part)	10/17/18	K		
100. - Jackson Natl Life Ins Co Inc:Pers L - IRA Annuity	E	Int./Div.	N	T	Distributed (part)	10/16/18	K		
101. - Pacific Life IRA Annuity: Pacific Innov Sel - IRA Annty	D	Int./Div.	M	T	Distributed (part)	10/16/18	J		
102. T Rowe Price Intl Value Equity	A	Dividend	J	T					

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103. Brokerage Account #1 (H)									
104. - MFB Northern Funds US Gov't Money Mkt Fd	A	Dividend	K	T					
105. - MFB Northern Fds Stk Index Fd	C	Dividend	L	T	Sold (part)	03/15/18	K	D	
106.					Buy (add'l)	06/14/18	J		
107.					Sold (part)	07/19/18	J	A	
108.					Sold (part)	09/13/18	J	A	
109.					Sold (part)	10/19/18	J	D	
110.					Buy (add'l)	12/20/18	J		
111.					Buy (add'l)	12/20/18	J		
112. - MFB Northern Fds Small Cap Index Fd	B	Dividend	J	T	Sold (part)	03/15/18	J	A	
113.					Buy (add'l)	06/14/18	J		
114.					Sold (part)	07/19/18	J	A	
115.					Sold (part)	10/19/18	J	A	
116.					Buy (add'l)	12/20/18	J		
117.					Buy (add'l)	12/20/18	J		
118. - MFB Northern Equity Index Fds Intl EQT Index	C	Dividend	L	T	Buy (add'l)	03/15/18	J		
119.					Sold (part)	06/14/18	K	C	

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05/14/2019

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)	07/19/18	J		
121.					Sold (part)	09/13/18	J	A	
122.					Buy (add'l)	10/19/18	J		
123. - MFB Northern Fds Emerging Mkts Equity Index Fd	B	Dividend	K	T	Sold (part)	03/15/18	J	A	
124.					Buy (add'l)	07/19/18	J		
125.					Sold (part)	09/13/18	K	A	
126.					Sold (part)	10/19/18	J	A	
127. - MFB Northern High Yield Fixed Income Fd	C	Dividend			Buy (add'l)	03/15/18	J		
128.					Buy (add'l)	06/14/18	J		
129.					Buy (add'l)	07/19/18	J		
130.					Buy (add'l)	09/13/18	J		
131.					Buy (add'l)	10/19/18	J		
132.					Buy (add'l)	12/11/18	J		
133.					Sold	12/11/18	L		
134. - MFB Northern Fds Global Real Estate Index Fd	A	Dividend	J	T	Buy (add'l)	03/15/18	J		
135.					Sold (part)	07/19/18	J	A	
136. - MFB Northern Fds Bd Index Fd	C	Dividend			Buy (add'l)	03/15/18	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	

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Name of Person Reporting

Bohm, Jeffrey E.

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05/14/2019

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)
137.					Buy (add'l)	05/17/18	J		
138.					Buy (add'l)	07/19/18	J		
139.					Buy (add'l)	09/13/18	J		
140.					Buy (add'l)	10/19/18	K		
141.					Buy (add'l)	12/11/18	J		
142.					Sold	12/11/18	M		
143. - MFB Northern Equity Index Fds Mid Cap Index	B	Dividend	K	T	Sold (part)	03/15/18	J	A	
144.					Buy (add'l)	06/14/18	J		
145.					Sold (part)	07/19/18	J	A	
146.					Sold (part)	10/19/18	J	A	
147.					Buy (add'l)	12/20/18	J		
148.					Buy (add'l)	12/20/18	J		
149. - MFC Flexshs Tr Morningstar Gbl Upstream Natl Res Indx Fd	A	Dividend	K	T	Sold (part)	03/15/18	J	A	
150.					Sold (part)	07/19/18	J	A	
151. - MFC Flexshares Tr Iboxx 3 Yr Target Duration Tips Indx Fd	A	Dividend	J	T	Buy (add'l)	03/15/18	J		
152.					Sold (part)	07/19/18	K		
153. - MFC Flexshares Tr STOXX Global Broad Infrastructure Index Fd	A	Dividend	J	T	Buy (add'l)	03/15/18	J		

1 Income Gain Codes: (See Columns B1 and D4)	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	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

Bohm, Jeffrey E.

Date of Report

05/14/2019

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)
154.					Sold (part)	07/19/18	J	A	
155. - MFO DFA Intl Small Co Portfolio Fd	A	Dividend			Sold (part)	03/15/18	J	A	
156.					Sold (part)	06/14/18	J	A	
157.					Buy (add'l)	07/19/18	J		
158.					Sold	12/11/18	J		
159. - MFC iShares Trust Core US Aggregate BD ETF	A	Dividend	M	T	Buy	12/11/18	M		
160. - MFC iShares Iboxx \$ High Yield Corporate Bond ETF	A	Dividend	L	T	Buy	12/11/18	L		.
161. Brokerage Account #2 (H)									
162. - Morgan Stanley Private Bank NA Bk Deps.	A	Interest	J	T					
163. - Harris Assoc Inv Tr: Oakmark Fund Advisor (fka Oakmark I)	A	Dividend	J	T	Sold (part)	01/17/18	J	B	
164. - PGIM Jennison Growth Z (fka Prudential Jennison Growth Z)	A	Dividend	J	T	Sold (part)	01/17/18	J	B	
165.					Sold (part)	01/24/18	J	A	
166.					Sold (part)	07/11/18	J	A	
167.					Sold (part)	10/09/18	J	A	
168. - Blackrock Low Dur Bd Inst Inv	A	Dividend	J	T	Buy (add'l)	01/17/18	J		
169.					Sold (part)	04/10/18	J		
170. - Blackrock Inflat Prot Bond I	A	Dividend	J	T	Buy (add'l)	01/17/18	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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Name of Person Reporting

Bohm, Jeffrey E.

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05/14/2019

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)
171. - Transamerica Life - B Shares Annuity		None	M	T					
172. - Blackrock Hi Yield Bd PTF Inst	A	Dividend			Sold (part)	01/10/18	J	A	
173.					Sold	01/17/18	J	A	
174. - Delaware SMID Cap Growth Inst	A	Dividend	J	T	Buy (add'l)	01/17/18	J		
175. - First Eagle Overseas I	A	Dividend	K	T	Buy (add'l)	01/17/18	J		
176. - Hartford Midcap I	A	Dividend	J	T	Sold (part)	01/17/18	J	A	
177. - JP Morgan Mid Cap Value I	A	Dividend	J	T	Sold (part)	01/17/18	J	A	
178. - Matthews Asian Japan Inv	A	Dividend	J	T	Buy (add'l)	01/17/18	J		
179. - PIMCO Short Term I2 (fka PIMCO Short Term P)	A	Dividend	J	T	Buy (add'l)	01/17/18	J		
180. - Virtus Kar Sm-Cap Value I	A	Dividend	J	T	Sold (part)	01/17/18	J	A	
181. - Wells Fargo Emerg Mrk Eq Inc I	A	Dividend	J	T	Sold (part)	01/17/18	J	A	
182. - Western Asset Core Plus Bd I	A	Dividend	J	T	Buy (add'l)	01/17/18	J		
183. Lucie Rie Pottery (X) (see part VIII)		None			Distributed	10/23/18	J		
184. Brokerage Acct #3 (H)									
185. - Wells Fargo Bank NA Sioux Falls SD (Ameriprise Insured Money Mkt)	A	Interest	J	T					
186. - iShares U S Consumer Services ETF	A	Dividend	K	T	Sold (part)	04/16/18	J	B	
187. - iShares U S Medical Devices ETF	A	Dividend	K	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	
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Name of Person Reporting

Bohm, Jeffrey E.

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188. - iShares U S Pharmaceuticals ETF		None			Sold	02/27/18	K	C	
189. - SPDR Dow Jones Industrial Average ETF	A	Dividend	K	T	Sold (part)	04/16/18	J	B	
190. - Sector Consumer Staples Select Sector SPDR ETF	A	Dividend			Sold (part)	02/27/18	K	C	
191.					Sold	04/16/18	J	A	
192. - iShares Select Dividend ETF	A	Dividend	J	T	Sold (part)	04/16/18	J	A	
193.					Sold (part)	09/11/18	K	B	
194. - iShares U S Aerospace & Defense ETF	A	Dividend	K	T					
195. - iShares U S Consumer Goods ETF	A	Dividend			Sold (part)	04/16/18	J		
196.					Sold	09/11/18	K		
197. - iShares Core Moderate Allocation ETF	A	Dividend	J	T					
198. - SPDR Series Trust S&P Dividend ETF	A	Dividend			Buy	01/02/18	J		
199.					Sold	09/11/18	J	A	
200. Xenia Hotels & Resorts Inc	A	Dividend	J	T					
201. Note Receivable - Kohavi	B	Interest	L	U					
202. First National Bank Scotia accts (see part VIII)	A	Interest	K	T					
203. IRA #10 (H) (see part VIII)									
204. - Wells Fargo Bank NA Sioux Falls SD (Ameriprise Insured Money Mkt)	A	Interest	J	T	Open	09/24/18	L		

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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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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	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)
205. - iShares US Aerospace & Defense ETF	A	Dividend	J	T	Buy	09/24/18	K		
206. - iShares US Consumer Services ETF	A	Dividend	K	T	Buy	09/24/18	K		
207. - SPDR Dow Jones Industrial Average ETF	A	Dividend	K	T	Buy	09/24/18	K		
208. Sale of Coins and Foreign Currency (see part VIII)		None			Sold	08/06/18	J		
209. Kinderhook Bank	A	Interest	J	T	Open	10/24/18	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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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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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

(1) Part VII, page 5, line 20: Under IRA #3, the Fidelity Advisor New Insights Fd Cl I was converted to Fidelity Advisor New Insights Cl Z on 03/02/18.

(2) Part VII, page 7, line 53 and page 15, line 203: On 09/20/18 the RiverSource Retirement Advisor Advanrtage 4 Variable Annuity was surrendered and the resulting funds were transferred to a new account, IRA #10.

(3) 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 J

Columbia VP Balance Fd Cl3 - Value of J

Columbia VP MidCap Val Cl3 - Value of J

Frankln 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

Columbia VP Small Cap Val Cl3 - Value of J

(4) Part VII, page 7, line 60: IRA #8 follows IRA # 5 as IRAs #6 and #7 were closed in 2016.

(5) Part VII, page 7, line 61: Under IRA #8, the Fidelity Advisor New Insights Fd Cl I was converted to Fidelity Advisor New Insights Fd Cl Z on 03/02/18.

(6) Part VII, page 9, lines 86 and 92: All shares of EPR Properties held under IRA #9 were transferred to IRA #8 on 06/29/18. IRA #9 received the dividends up to the date of transfer.

(7) Part VII, page 9, line 88: [REDACTED] beneficiary of the Powell Mineral Trust, a trust created by members of [REDACTED] 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.

(8) Part VII, page 9, line 90: Cash in this IRA account valued at "J" was transferred to IRA #8 on 05/14/18.

(9) Part VII, page 14, line 183: Trust #2 distributed Lucie Rie pottery, a family heirloom, to me in 2011. I gave my remaining pottery to my sibling on October 23, 2018.

(10) Part VII, page 15, line 202: These accounts belong to my sibling. They are listed on this report only because I have signature authority on my sibling's accounts.

(11) Part VII, page 16, line 208: On 08/06/18 I sold a collection of coins and foreign currency valued at "J" to a collector.

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Name of Person Reporting

Bohm, Jeffrey E.

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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