

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) Burris, Helen E.	2. Court or Organization US Bankruptcy Court, DSC	3. Date of Report 5/15/2020
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) US Bankruptcy Judge- 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 Federal Courthouse 201 Magnolia Street Spartanburg, SC 29306		
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.)

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> (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	The Law Office of Eric K. Englebardt, LLC (this entity owns 50% of Wilson & Englebardt, 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	1/18/19 to 1/20/19	Myrtle Beach, SC	CLE/Bar meeting	registration waived
2. South Carolina Bankruptcy Law Association	3/29/19 to 3/31/19	Savannah, GA	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.)

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. American Express	credit card	J
2. U.S. Department of Education/Nelnet	student loan (dependent child's obligation)	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. South State Bank - Accounts	A	Interest	K	T					
2. Allianz 222 Annuity (H)									
3. -AnPtPtw/cap- Bloomberg US Dynamic Balance Index II	A	Interest	M	T	Buy (add'l)	03/02/19	L		
4. -MoSum-Nasdaq-100Index	A	Interest			Sold	03/02/19	L		
5. -AnPtPt/spread-PIMCO Tactical Balanced Index	A	Interest			Sold	03/02/19	L		
6. -MoSum -Russell 2000 Index Monthly Sumw/cap	A	Int./Div.	K	T	Buy	03/02/19	K		
7. NW Mutual Whole Life Cash Value #1	C	Dividend	M	T					
8. Fidelity Freedom Fund 2030 (FFFEX)	D	Int./Div.	N	T					
9. Presidio Property Trust, Inc.	A	Int./Div.	J	T					
10. Rental Property #1 Greenville SC	D	Rent	L	W					
11. Future Scholar 529 College Savings Plan (2) (H)									
12. -FS Mod Conserv (no control)	A	Int./Div.	J	T	Distributed (part)	05/06/19	J		
13. -FS Mod Growth Port Static (no control)	A	Int./Div.	J	T	Distributed (part)	05/06/19	J		
14. TD Ameritrade Institutional (H)									
15. -Ishares Core S&P Mid-Cap ETF (IJH)	A	Int./Div.	J	T	Sold (part)	05/20/19	J		
16. -cont'd					Sold (part)	08/20/19	J		
17. -Ishares Core S&P Small-Cap ETF (IJR)	A	Int./Div.	J	T	Sold (part)	02/20/19	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	

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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)
18. -Ishares Floating Rate Bond ETF (FLOT)	A	Int./Div.	J	T					
19. -Vanguard FTSE Developed Markets ETF (VEA)	A	Int./Div.	K	T	Sold (part)	02/20/19	J		
20. -cont'd					Sold (part)	08/20/19	J		
21. -Vanguard Emerging Markets ETF (VWO)	A	Int./Div.	K	T	Buy (add'l)	02/20/19	J		
22. -cont'd					Buy (add'l)	05/20/19	J		
23. -Vanguard Index Funds S&P 500 ETF (VOO)	A	Int./Div.	L	T	Buy (add'l)	05/20/19	J		
24. -cont'd					Buy (add'l)	08/20/19	J		
25. -SPDR Series Trust Short Term High Yield Bond ETF (SJNK)	A	Int./Div.	J	T					
26. -Ishares Core US Aggregate Bond ETF (AGG)	A	Int./Div.			Sold	02/20/19	J		
27. -ETFS TR BBG COMD K1 ETF (BCI) name change Aberdeen Std Invests ETFS	A	Int./Div.			Sold	02/20/19	J		
28. -SPDR FTSE PORTFOLIO INTRMD ETF (SPIB)	A	Int./Div.	J	T					
29. -Vanec Vectors JP Morgan MKTS ETF (EMLC)	A	Int./Div.	J	T					
30. -Vanguard Mortg-Back Sec ETF (VMBS)	A	Int./Div.	J		Buy	02/20/19	J		
31. -IndexIQETF Trust IQMrgr Arb Etf (MNA)	A	Dividend	J		Buy	02/20/19	J		
32. Community National Bank IRA	A	Interest	J	T					
33. Griffin Inst Success RE FdCLC	B	Int./Div.	K	T					
34. 2nd home Boone, NC	C	Rent	M	W					

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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)	(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)
35. American Funds (H)									
36. -The Growth Fund of American C (305)	A	Int./Div.	K	T	Buy (add'l)	04/15/19	J		
37. -Fundamental Investors C (310)	A	Int./Div.	K	T	Buy (add'l)	04/15/19	J		
38. -American Balanced Funds C (311)	A	Int./Div.	K	T	Buy (add'l)	04/15/19	J		
39. -New World Fund C (336)	A	Int./Div.	K	T	Buy (add'l)	04/15/19	J		
40. -Europacific Growth Fund C (316)	A	Int./Div.	K	T	Buy (add'l)	04/15/19	J		

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

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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/ **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
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