

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) BEYER, LAURA T.	2. Court or Organization U.S. BANKRUPTCY COURT, WESTERN DISTRICT OF NORTH CAROLINA	3. Date of Report 07/16/2020
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) CHIEF BANKRUPTCY JUDGE	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2019 to 12/31/2019
7. Chambers or Office Address CHARLES R. JONAS FEDERAL BUILDING 401 WEST TRADE ST. CHARLOTTE NC 28202		
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. Trustee	[REDACTED] Trust
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.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 11

Name of Person Reporting

BEYER, LAURA T.

Date of Report

07/16/2020

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	Parker Poe Adams & Bernstein - Equity Partnership Draw
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. Western District Bankruptcy Seminar	5/10/2019	Charlotte, NC	Seminar	Tuition, lunch, and parking
2. 42nd Annual Bankruptcy Institute (NC Bar)	11/21/2019 - 11/22/2019	Wilmington, NC	Seminar	Tuition, stipend for hotel, mileage, and parking
3.				
4.				
5.				

Name of Person Reporting	Date of Report
BEYER, LAURA T.	07/16/2020

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.		

FINANCIAL DISCLOSURE REPORT

Page 4 of 11

Name of Person Reporting

BEYER, LAURA T.

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07/16/2020

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)	(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. [REDACTED], LP									
2. - Rental House 1, Tifton, GA	D	Rent	M	Q					
3. - Rental House 2, Tifton, GA	C	Rent	M	Q					
4. - Rental House 3, Tifton, GA	D	Rent	M	Q					
5. - Rental House 4, Tifton, GA	D	Rent	L	Q					
6. - South Georgia Bank Cash Account	A	Interest	K	T					
7. [REDACTED] Partnership									
8. - Farm 1 (Davis Farm), Ashburn, GA (Farm 1 and Farm 3 merged)	E	Rent	P1	W					
9. - Farm 2 (Sunsweet Farm), Ashburn, GA	E	Rent	N	W					
10. - South Georgia Bank Cash Account	A	Interest	L	T					
11. Wells Fargo Stock Account									
12. -- AT&T Inc.	B	Dividend	K	T					
13. -- Johnson & Johnson	B	Dividend	L	T					
14. -- Pepsico Inc.	A	Dividend	K	T					
15. -- Pfizer Incorporated	A	Dividend	K	T					
16. -- Proctor & Gamble Co.	B	Dividend	L	T					
17. -- Coca-Cola Company	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	
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	

FINANCIAL DISCLOSURE REPORT

Page 5 of 11

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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) 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. -- Lowes Companies, Inc.	A	Dividend	K	T					
19. -- VISA Inc. Class A	A	Dividend	M	T					
20. Northwestern Mutual Advisory Account									
21. -- Europacific Growth Fund	A	Dividend	J	T					
22. -- DWS Enhanced Commodity Strategy Fund	A	Dividend	J	T					
23. -- Dodge & Cox Int'l Fund	A	Dividend	J	T					
24. -- Fidelity Advisor Mid Cap II Fund					Sold	03/18/19	J		
25. -- Fidelity Advisor New Insights Fund	A	Dividend	K	T					
26. -- Franklin Federal Intermediate--Term Tax-Free Income Fund	A	Dividend	J	T					
27. -- Fidelity Advisor Intermediate Muni Income Fund	A	Dividend	J	T					
28. -- John Hancock Disciplined Value Mid Cap Fund	A	Dividend	J	T					
29. -- MFS Value Fund	A	Dividend	K	T					
30. -- Northern Small Cap Value Fund	A	Dividend	J	T					
31. -- T Rowe Price Emerging Markets Stock	A	Dividend	J	T					
32. -- Baron Asset Fund Institutional Class	A	Dividend	J	T	Buy	03/18/19	J		
33. -- Principal Real Estate Securities	A	Dividend	J	T	Buy	03/18/19	J		
34. -- T Rowe Price Real Estate					Sold	03/18/19	J		

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FINANCIAL DISCLOSURE REPORT

Page 6 of 11

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☐ NONE (No reportable income, assets, or transactions.)

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35. -- General Mny Mkt. Fund	A	Dividend	J	T					
36. -- New World Fund	A	Dividend	J	T					
37. Charles Schwab Bank Checking Account	A	Interest	J	T					
38. Charles Schwab Roth Contributory IRA									
39. -- Schwab 1000 Index Fund	A	Dividend	J	T					
40. -- Vanguard Growth & Income Fund Investor Shares	A	Dividend	J	T					
41. Charles Schwab Roth Contributory IRA									
42. -- Janus Growth & Incm CL T	A	Dividend	J	T					
43. -- Schwab 1000 Index Fund	A	Dividend	J	T					
44. Wells Fargo Cash Accounts	A	Interest	M	T					
45. Wells Fargo Retirement Savings Account	A	Interest	J	T					
46. Northwestern Mutual Rollover IRA									
47. -- DWS Enhanced Commodity Strategy Fund	A	Dividend	J	T	Buy (add'l)	10/04/19	J		
48. -- Dodge & Cox International Fund	A	Dividend	J	T	Buy (add'l)	10/04/19	J		
49. -- Europacific Growth Fund	A	Dividend	J	T					
50. -- Fidelity Advisor Mid Cap II Fund	A	Dividend	J	T					
51. -- Fidelity Advisor New Insights Fund	A	Dividend	J	T	Sold (part)	03/18/19	J		

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FINANCIAL DISCLOSURE REPORT

Page 7 of 11

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52.					Sold (part)	10/07/19	J		
53. -- The Oakmark Int'l Fund	A	Dividend	J	T					
54. -- Hartford World Bond Fund	A	Dividend	J	T	Sold (part)	08/19/19	J		
55. -- John Hancock Disciplined Value Mid Cap Fund	A	Dividend	J	T					
56. -- MFS Value Fund	A	Dividend	J	T	Sold (part)	10/07/19	J		
57. -- Northern Small Cap Value Fund	A	Dividend	J	T					
58. -- Pimco Income Fund	A	Dividend	J	T	Sold (part)	10/07/19	J		
59. -- T. Rowe Price Real Estate					Sold	03/18/19	J		
60. -- New World Fund	A	Dividend	J	T					
61. -- General Mny. Mkt. Fund	A	Dividend	J	T					
62. -- TIAA CREF Bond Fund Advisor	A	Dividend	J	T	Sold (part)	08/19/19	J		
63. -- Goldman Sachs Int'l Small Cap Insights Fund Class I	A	Dividend	J	T	Buy (add'l)	10/07/19	J		
64. -- Principal Global Multi Strategy Fund Class 1	A	Dividend	J	T	Buy	10/07/19	J		
65. -- American Century Short Duration Inflation Protection Bond	A	Dividend	J	T	Buy	08/19/19	J		
66. -- Baron Asset Fund Institutional Class	A	Dividend	J	T	Buy	03/18/19	J		
67. -- Principal Real Estate Securities	A	Dividend	J	T	Buy	03/18/19	J		
68. MassMutual Parker Poe Adams & Bernstein 401(k) Profit Shg Plan & Trust									

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FINANCIAL DISCLOSURE REPORT

Page 8 of 11

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69. -- AmerFunds EuroPacific Gr Fund	A	Dividend	K	T	Buy	12/17/19	K		
70. -- Baird Aggregate Bond Fund	A	Dividend	L	T	Buy	12/17/19	L		
71. -- BlackRock iShrs US Ag Bd In Fd	A	Dividend	L	T	Buy	12/17/19	L		
72. -- BlackRock Lifepath Inx 2035 Fd					Sold	12/17/19	P1		
73. -- Goldman Sachs Sm Cap Gr Inst Fd	A	Dividend	L	T	Buy	12/17/19	L		
74. -- JP Morgan Mid Cap Value Fund	A	Dividend	K	T	Buy	12/17/19	K		
75. -- MFS Value Fund	B	Dividend	M	T	Buy	12/17/19	M		
76. -- Sel Md Cp Gr Fd (TRP/Frontier)	A	Dividend	K	T	Buy	12/17/19	K		
77. -- Sel TRP/LS Blue Chip Growth Fd	A	Dividend	L	T	Buy	12/17/19	L		
78. -- Vanguard Tot Intl Stck Indx Fd	B	Dividend	M	T	Buy	12/17/19	M		
79. -- Wells Fargo Stbl Rtn Fd (Gilliard)					Sold	12/17/19	K		
80. -- SAGIC Diversified Bond II	A	Dividend	K	T	Buy	12/17/19	K		
81. -- American Century Sm Cap Val Fd	A	Dividend	L	T	Buy	12/17/19	L		
82. -- BlackRock Equity Index CIT	C	Dividend	N	T	Buy	12/17/19	N		
83. -- Fidelity Extended Markt Idx Fd	A	Dividend	L	T	Buy	12/17/19	L		
84. -- Vanguard FTSE Social Index Fd	A	Dividend	L	T	Buy	12/17/19	L		
85. Learning Quest 529 Moderate Portfolio		None	M	T					

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86. VA 529 Aggressive Portfolio		None	M	T					
87. Guardian Whole Life Policy #1	A	Dividend	J	T					
88. Guardian Whole Life Policy #2	A	Dividend	J	T					
89. Guardian Whole Life Policy #3	A	Dividend	J	T					
90. Northwestern Mutual Whole Life Policy	A	Dividend	K	T					
91. Proctor and Gamble Common Stock (X)	A	Dividend	K	T					

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

FINANCIAL DISCLOSURE REPORT

Page 10 of 11

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

VII. INVESTMENTS AND TRUSTS

The income earned by the [REDACTED] also includes rental income. The basis for the value of the rental houses under Part VII on lines 2 - 5 is the tax value as of December 31, 2013.

I. POSITIONS

I am not listing any positions in Part I related to the partnerships reported in Part VII on lines 1 and 7 as my interest is as a limited partner and a partner, respectively, and I have no managerial responsibilities. See Instructions, page 9.

Although I am a trustee of the [REDACTED] Trust, I receive no income nor do I have beneficial interest in the principal or income from the Trust or estate. Therefore, there are no reportable assets in the Trust. See Instructions, page 48

FINANCIAL DISCLOSURE REPORT

Page 11 of 11

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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/ **LAURA T. BEYER**

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