

FINANCIAL DISCLOSURE REPORT

FINAL FILING

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) FitzSimon, Jean K.	2. Court or Organization United States Bankruptcy Court, Eastern District of PA	3. Date of Report 06/27/2020
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) United States Bankruptcy Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☐ Annual ☒ Final	6. Reporting Period 01/01/2019 to 06/27/2020
	5b. ☐ Amended Report	
7. Chambers or Office Address Robert N.C. Nix, Sr. Federal Courthouse 900 Market Street Suite 203 Philadelphia, PA 19107		
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. Executor	Estate #1
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.	
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.	Eastern District of Pennsylvania (EDPA) Bankruptcy Conference	January 24-25, 2019	Atlantic City, NJ	EDPA Bankruptcy Conference 30th Annual Forum	Registration, Hotel, Meals
2.	Turnaround Management Association (TMA)	June 5-6, 2019	Atlantic City, NJ	2019 TMA Mid-Atlantic Regional Symposium	Registration, Hotel, Meals
3.	American Bar Association (ABA)	August 9-11, 2019	San Francisco, CA	ABA 2019 Annual Meeting	Registration, Transportation, Hotel, Meals
4.	ABA Business Law Section (BLS)	September 11-13, 2019	Washington, DC	ABA BLS Annual Meeting	Transportation, Hotel, Meals
5.	Philadelphia Bar Association (PBA)	October 11-12, 2019	Atlantic City, NJ	PBA Bench-Bar Annual Conference	Registration, Hotel, Meals

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6.	National Conference of Bankruptcy Judges (NCBJ) & ABA @ NCBJ	October 29, 2019 to November 2, 2019	Washington, DC	NCBJ 2019 Annual Conference & ABA @ NCBJ	Transportation, Hotel, Meals
7.	ABA BLS	January 9-11, 2020	Laguna Beach, CA	ABA BLS 2020 Midwinter Leadership Meeting	Meals

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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.		
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. METLIFE Life Insurance Policy (Whole Life Policy)	A	Dividend	J	T					
2. FITZSIMON, Parker & Lustiger, P.C.		None			Closed	02/28/19	J	A	
3. ESTATE #1									
4. ---ABBOTT Laboratories Common Stock		None	J	T					
5. METLIFE Policy Holder Trust	A	Dividend			Sold	11/01/19	J	A	Brighthouse Financial
6. TRUMARK Account	A	Interest	M	T					
7. TRUMARK IRA	B	Interest	M	T	Distributed (part)	07/01/19	J		
8.									
9.									
10.									
11.									
12.									
13.									
14.									
15.									
16.									
17.									

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

VII. INVESTMENTS and TRUSTS

2. FITZSIMON, PARKER & LUSTIGER, P.L.C. was DISSOLVED on February 28, 2019. There were NO ASSETS to be distributed.

7. D. This was the required minimum distribution for 2019.

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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/ Jean K. FitzSimon

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
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