

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) KEELEY, IRENE M.	2. Court or Organization USDC NORTHERN DISTRICT OF WV	3. Date of Report 08/10/2020
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. DISTRICT COURT JUDGE-SENIOR STATUS	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 UNITED STATES DISTRICT COURT NORTHERN DISTRICT OF WV PO BOX 2808 CLARKSBURG WV 26302-2808		
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. MEMBER - PRESIDENT'S HOUSE ADVISORY COMMITTEE	WEST VIRGINIA UNIVERSITY
2. MEMBER - BUDGET COMMITTEE	JUDICIAL CONFERENCE OF THE UNITED STATES
3. BOARD MEMBER	SPENCER WILLIAMS FOUNDATION
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.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 13

Name of Person Reporting

KEELEY, IRENE M.

Date of Report

08/10/2020

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.	
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. COLLEGE OF LABOR AND EMPLOYMENT LAWYERS	2/1/19-2/3/19	CHARLESTON, SC	SPEAKER AT COLLEGE OF LABOR AND EMPLOYMENT LAWYERS REGIONAL MEETING	TRAVEL, LODGING & MEALS
2.				
3.				
4.				
5.				

Name of Person Reporting	Date of Report
KEELEY, IRENE M.	08/10/2020

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 13

Name of Person Reporting

KEELEY, IRENE M.

Date of Report

08/10/2020

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. CHASE BANK ACCTS	A	Interest	O	T					
2. PREMIER BANK- BANK ACCOUNTS	A	Interest	J	T					
3. MVB BANK INC	A	Interest	J	T					
4. WESBANCO BANK INC	C	Interest	N	T					
5. WESBANCO BANK INC	A	Interest	J	T					
6. CLEAR MOUNTAIN BANK	A	Interest	L	T					
7. GROUND BREAKERS INC S CORP COMMON STOCK		None	M	U					
8. -- HARRISON COUNTY WV		None	O	W					
9. --NOTE RECEIVABLE DUE FROM GROUND BREAKERS INC	C	Interest	M	U					
10. INVESTMENT ACCOUNT #1 (H)									
11. -MERRILL LYNCH CMA ACCT	A	Interest	K	T					
12. -DUKE ENERGY CORP NEW COMMON STOCK	A	Dividend	K	T					
13. -BANK OF AMERICA CORP COMMON STOCK	A	Dividend	K	T					
14. -EDISON INT'L CALIF COMMON STOCK	A	Dividend	K	T					
15. -HALLIBURTON COMPANY COMMON STOCK	A	Dividend	J	T					
16. -OCCIDENTAL PETE CORP CAL COMMON STOCK	A	Dividend	J	T					
17. -CALIFORNIA RESOURCES CORP		None	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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FINANCIAL DISCLOSURE REPORT

Page 5 of 13

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18. -CSX CORP COMMON STOCK	A	Dividend	K	T					
19. INVESTMENT ACCOUNT #2 (H)									
20. -DREYFUS INS DEP PROG I	A	Interest			Closed	02/19/19	J		
21. -CS BANK	A	Interest	J	T	Open	02/19/19	J		
22. -BARON ASSET FUND INSTITUTIONAL CL	A	Dividend	K	T					
23. -BARON SMALL CAP FUND INSTITUTIONAL	A	Dividend	J	T					
24. -CALVERT EMERG MKTS EQUITY FUND	A	Dividend	J	T					
25. -INT'L GRWTH&INC FUND CL F-2	A	Dividend	K	T					
26. -CLEARBRIDGE INT'L SMALL CAP FUND CL I	A	Dividend			Sold	12/05/19	J	A	
27. -NUVEEN HIGH YIELD MUNI BND FUND CL I	A	Interest			Sold	02/28/19	K	B	
28. -TRANSAMERICA INT MUNI FUND CL A	A	Interest			Sold	02/28/19	L	C	
29. -VAN ECK CONSTANT MAT COMM IND FUND CL Y	A	Dividend			Sold	03/01/19	J	A	
30. -BLACKROCK STRAT MUNI OPPOR FD	B	Dividend	L	T					
31. -FUNDAMENTAL INV CL F-2	B	Dividend			Sold	12/05/19	K	B	
32. -PIMCO INC INST CL	B	Dividend	L	T					
33. -VANGUARD INT TERM TAX	B	Int./Div.	M	T	Buy	03/01/19	L		
34. -PRINCIPAL GLOBAL REAL ESTATE SEC FD INSTL CL	A	Dividend	K	T	Sold (part)	03/01/19	J	A	

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Page 6 of 13

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35. -ROYCE OPPORTUNITY FD INV CLASS	A	Dividend			Sold	12/04/19	J	A	
36. -VANGUARD LARGE CAP	A	Dividend	K	T	Buy	02/28/19	K		
37. -VANGUARD TOTAL WORLD STOCK	A	Dividend	M	T	Buy	12/05/19	M		
38. -ISHARES TR CORE S&P 500ETF	A	Dividend	M	T					
39. -ISHARES TR CORE S&P MIDCAP ETF	A	Dividend	K	T					
40. -ISHARES TR CORE MSCI EAFE ETF	A	Dividend			Sold	12/06/19	K	B	
41. -ISHARES INC CORE MSCI EMERGING MKTS ETF	A	Dividend	K	T					
42. INVESTMENT ACCOUNT #3 (H)									
43. -CS BANK	A	Interest	J	T	Buy	12/06/19	J		
44. -INVESCO CONSERV INC FD INST	C	Dividend	N	T	Buy	02/27/19	N		
45.					Sold (part)	03/21/19	M	A	
46.					Sold (part)	04/03/19	M	A	
47.					Buy	05/07/19	L		
48.					Buy	10/30/19	L		
49. -JP MORGAN ULTRA SHORT INC ETF	A	Dividend	N	T	Buy	03/22/19	M		
50.					Sold (part)	04/05/19	M	A	
51.					Sold (part)	08/02/19	M	A	

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FINANCIAL DISCLOSURE REPORT

Page 7 of 13

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52.					Buy	05/08/19	L		
53.					Buy	10/31/19	M		
54. -EXXONMOBIL	B	Dividend	K	T	Buy	04/05/19	K		
55. -CHEVRON CORP	B	Dividend	L	T	Buy	04/05/19	L		
56. -BOEING CO	B	Dividend	N	T	Buy	04/05/19	N		
57. WESBANCO INC COMMON STOCK	A	Dividend	J	T					
58. HUNTINGTON BANCSHARES COMMON STOCK	A	Dividend	J	T					
59. AT&T INC COMMON STOCK	A	Dividend	J	T					
60. THE TRAVELERS COMPANIES INC COMMON STOCK	A	Dividend	J	T					
61. COMPOSITE TRANSPORT TECHNOLOGIES INC		None			Closed	12/31/19	K	A	
62. US SAVINGS BONDS	A	Interest	J	T					
63. LINCOLN FINANCIAL GROUP ANNUITY(H)									
64. --FIXED ACCOUNT	A	Int./Div.	J	T					
65. --INDEXED ACCOUNT A	A	Int./Div.	K	T					
66. NOTE RECEIVABLE TDC LLC	D	Interest	M	U	Matured (part)	10/14/19	M		
67. IRA # 1 (H)									
68. --MSA BALANCED FUND	A	Int./Div.	J	T	Distributed (part)	12/01/19	J		

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FINANCIAL DISCLOSURE REPORT

Page 8 of 13

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69. --MSA INDEX 500 STOCK FUND	A	Dividend	K	T					
70. IRA # 2 (H)									
71. -DREYFUS INS DEPOSIT PROGRAM I	A	Interest			Closed	02/19/19	J		
72. -CS BANK	A	Interest	J	T	Open	02/19/19	J		
73.					Distributed (part)	04/05/19	J		
74.					Distributed (part)	05/14/19	K		
75.					Distributed (part)	12/18/19	J		
76. -AB GLOBAL BOND FUND	A	Interest			Sold	03/01/19	J	A	
77. -AMER CENTURY EMERG MKTS FUND	A	Dividend			Sold	03/01/19	J	A	
78. -AMER HIGH INC TRST CL F-2	A	Int./Div.			Sold (part)	03/01/19	K	A	
79.					Sold	12/04/19	J	A	
80. -THE BOND FUND OF AMER CL F-2	A	Interest			Sold	02/28/19	J	A	
81. -COHEN & STEERS REAL ESTATE SEC FUND CL I	A	Dividend	K	T	Sold (part)	03/01/19	J	A	
82. -THE OAKMARK INT'L FUND INVESTORS CL	B	Dividend	K	T					
83. -JOHN HANCOCK DISC VAL MID CAP FUND CL I	A	Dividend	K	T					
84. -JPMORGAN US SMALL COMPANY FUND CL I	A	Dividend			Sold	02/28/19	K	B	
85. -MFS INT'L NEW DISCOVERY FUND CL I	A	Dividend	K	T					

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FINANCIAL DISCLOSURE REPORT

Page 9 of 13

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86. -NORTHERN MID-CAP INDEX PORTFOLIO	B	Dividend	K	T					
87. -PIMCO REAL RETURN FUND CLASS 1-2	A	Dividend			Sold	03/01/19	K	C	
88. -PIMCO INC FUND CL I2 (formerly CL 1-2)	A	Int./Div.	L	T					
89. -PIMCO INCM INST CL	A	Int./Div.	J	T	Buy	12/05/19	J		
90. -VAN ECK CONSTANT MATURITY COMM INDEX FUND CL Y	A	Dividend			Sold	03/01/19	J	A	
91. -WASHINGTON MUTUAL INVESTORS FUND CL F-2	A	Dividend			Sold	09/13/19	K	B	
92. -BLACKROCK TOTAL RETURN FD CL INST	B	Dividend			Sold	09/13/19	K	B	
93. -CAPITAL WORLD BOND FD CL F-2	A	Dividend			Sold	09/13/19	K	A	
94. -EATON VANCE GLOBAL MACRO ABSOLUTE RETURN FD CL I	B	Dividend			Sold (part)	05/10/19	J	A	
95.					Sold	12/05/19	K	B	
96. -JPMORGAN EMERG MKTS EQUITY FD CL I	A	Dividend	K	T					
97. -JPMORGAN EMERG MKTS DEBT FD CL I	B	Dividend			Sold	12/05/19	J	A	
98. -PIMCO MORTGAGE OPPOR & BND FD INSTL CLASS	A	Dividend			Sold (part)	03/04/19	K	B	
99.					Sold (part)	05/10/19	J	A	
100.					Sold	12/05/19	J	A	
101. -PIMCO DYNAMIC CRDT & MORTGAGE INC FD	B	Dividend			Sold	03/04/19	K	A	
102. -PRINCIPAL GLBL RE SEC FD INSTL CL	A	Dividend	J	T	Sold (part)	03/01/19	J	A	

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Page 10 of 13

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103. -VIRTUS KAR SMALL-CAP GRWTH FD CL I	A	Dividend	K	T					
104. -ISHARES TR CORE S&P 500 ETF	A	Dividend	M	T	Sold (part)	05/13/19	J	A	
105. -ISHARES TR CORE US AGGREGATE BD ETF	A	Int./Div.			Sold	03/04/19	L	B	
106. -ISHARES TR CORE MSCI EAFE ETF	A	Dividend	L	T					
107. -ISHARES INC CORE MSCI EMERGING MKTS ETF	A	Dividend			Sold	09/16/19	K	A	
108. -BLACKROCK STRAT INC OPPTY PORT INSTL	A	Int./Div.	K	T	Buy	03/01/19	K		
109.					Buy (add'l)	12/05/19	J		
110. -DODGE & COX INC FD	C	Int./Div.	M	T	Buy	03/01/19	L		
111.					Buy (add'l)	09/13/19	K		
112. -VANGUARD LARGE CAP INDX	B	Dividend	K	T	Buy	03/01/19	K		
113. -METROPOLITAN WEST TOTAL RETURN	B	Dividend	L	T	Buy	09/13/19	L		
114. -VANGUARD MID CAP INDX	B	Dividend	K	T	Buy	09/13/19	K		
115. -TEMPLETON GLOBAL BOND FD	A	Int./Div.	L	T	Buy	12/05/19	L		
116. NORTHWESTERN MUTUAL EXTRA ORD LIFE POLICY	D	Interest	M	T					
117. NORTHWESTERN MUTUAL ADJ COMPLIFE POLICY	E	Interest	O	T					
118. WORKING INTEREST D-86 TRAVIS, DODDRIDGE CTY,WV		None	J	U					

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		

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)
119. WORKING INTEREST D88 LOWTHER&D92MCQUAID HARRISON CTY WV		None	J	U					
120. WORKING INTEREST D103 WINDON HARRISON CTY WV		None	J	U					
121. WORKING INTEREST D105 SWEENEY HARRISON CTY WV		None	J	U					
122. WORKING INTEREST D106 DOYLE HARRISON CTY,WV		None	J	U					
123. WORKING INTEREST D107 HARDMAN HARRISON CTY,WV		None	J	U					
124. WORKING INTEREST D108 SHAFFER HARRISON CTY,WV		None	J	U					
125. ESTATE # 1 (appraisal date 11/19/03)		None	M	Q					
126. --COMMERCIAL REAL ESTATE,HARRISON CTY,WV									
127.									

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		

FINANCIAL DISCLOSURE REPORT

Page 12 of 13

Name of Person Reporting

KEELEY, IRENE M.

Date of Report

08/10/2020

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

PART VII, LINE 33 - NOTE NAME CHANGE FROM PIMCO INC FD CL1-2 TO PIMCO INCM INST CL

PART VII, LINE 62 - COMPOSITE TRANSPORT DETERMINED TO BE WORTHLESS SECURITY AT 12/31/19

PART VII, LINE 67 - TRANSACTION TYPE REPRESENTS THE THIRD ANNUAL PRINCIPAL PAYMENT OF A FOUR YEAR NOTE RECEIVABLE. THERE IS NO GAIN TO REPORT ON THE RECEIPT OF PRINCIPAL. THE INTEREST PORTION OF THE SCHEDULED ANNUAL PAYMENT IS REPORTED IN COLUMN B(1).

PART VII, LINE 68 - NOTE NAME CHANGE FROM NORTHWESTERN MUTUAL VARIABLE ANNUITY IRA (H) TO IRA # 1 (H)

PART VII, LINE 71 - NOTE NAME CHANGE FROM NORTHWESTERN MUTUAL IRA ROLLOVER ACCT (H) TO IRA #2 (H)

PART VII, LINE 119 THRU 125 - THERE WAS NO REPORTABLE OR TAXABLE INCOME GENERATED DURING THE REPORTING PERIOD BY THE WORKING INTERESTS IN THE OIL & GAS WELLS LISTED ON LINES 119 THRU 125.

PART VII, LINE 126 - NO REPORTABLE OR TAXABLE INCOME GENERATED BY ESTATE # 1 DURING THE REPORTING PERIOD.

FINANCIAL DISCLOSURE REPORT

Page 13 of 13

Name of Person Reporting

KEELEY, IRENE M.

Date of Report

08/10/2020

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/ IRENE M. KEELEY**

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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Washington, D.C. 20544