

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) Coogler, Lawrence S.	2. Court or Organization Northern District of Alabama	3. Date of Report 8/13/2020
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Active District 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 Tuscaloosa Federal Building 2005 University Blvd. Tuscaloosa, AL 35401		
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. 2019	University of Alabama - School of Law, Salary for teaching	\$10,000.00
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	Mitzi H. Coogler, CPA, Income from accounting practice.
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.	Jose R. Rivas	Kimber Model 1911 9mm Pistol	\$849.00
2.	Larry Morris	Quail and Pheasant Hunting at Lodge	\$1,500.00
3.	Larry Morris	Alabama Football tickets	\$600.00
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.	BBVA Compass Bank	Real Estate Mortgage (Greystone)	M
2.	Renasant Mortgage	Real Estate Mortgage (H. Drive)	M
3.	Wells Fargo Home Mortgage	Real Estate Mortgage (Anchorage)	M
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. Rental Property No. 2, Tuscaloosa, AL () HH	D	Rent	M	W					
2. Rental Property No. 3, Tuscaloosa, AL () Cap	D	Rent	M	W					
3. Coogler & Copeland, Jnt. Vnt. (33 ave Tuscaloosa,AL) 50% Int	D	Rent	L	W					
4. Checking Account #1 Bank of Tuscaloosa		None	J	T					
5. Checking Account #2 Bank of Tuscaloosa		None	J	T					
6. Savings Account - BBVA (prev. Compass Bank) (LSC - MC)	A	Interest	J	T					
7. Money Market Account #1 - Synovus (prev. Bank of Tuscaloosa)	A	Interest	J	T					
8. TD Waterhouse Bank Money Market Account ()	A	Interest	J	T					
9. Checking Acct- Life Insurance Trust Synovus (prev Bank of Tuscaloosa)		None	J	T					
10. Real Estate Rental, Sherwood East, Ltd. 1/12 (Tuscaloosa, AL)	B	Rent	K	U					
11. Prepaid College Tuition Plan, State of Alabama (HCC)		None	J	W					
12. Prepaid College Tuition Plan, State of Alabama (ADC)	D	Distribution	J	W					
13. Money Market Account #4, Synovus (prev Bank of Tuscaloosa) (HCC)	A	Interest			Distributed	01/01/19	J		Hannah C. Coogler
14. Money Market Account #5, Synovus (prev Bank of Tuscaloosa) (ADC)	A	Interest	K	T					
15. Retirement Systems - State of Alabama	C	Interest	L	T					
16. Rental Property No. 4 -Tuscaloosa, AL (CC)	D	Rent	M	W					
17. Checking Account BBVA (prev Compass Bank) (ADC)		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	
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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☐ 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)
18. Rental Property No. 5 (C. Creek) - Tuscaloosa, AL	D	Rent	M	W					
19. Checking Account BBVA (prev Compass Bank) (HCC)		None			Distributed	01/01/19	J		Hannah C. Coogler
20. Rental Property No.6 (Greystone) Northport, AL	D	Rent	M	W					
21. Business Checking Account - SmartBank (prev Capstone Bank) (Mitzi CPA)		None	L	T					
22. Business Savings Account-SmartBank (prev Capstone Bank) (Mitzi CPA)	A	Interest	L	T					
23. Rental Property No. 7 (Greystone #2) Northport, AL	D	Rent	M	W					
24. Rental Property No 8 (H. Drive No. 2) Tuscaloosa, AL	D	Rent	M	W					
25. Rental Property No 9 (Vestavia No. 3) Northport, AL	C	Rent	M	W					
26. Stifel Money Market (LSC-MHC)	A	Interest	K	T					
27. Stifel Money Market (HCC)	A	Interest			Distributed	01/01/19	J		Hannah C. Coogler
28. Ishares Core Growth Allocation ETF (HCC)	A	Dividend			Distributed	01/01/19	J		Hannah C. Coogler
29. Stifel Money Market (ADC)	A	Interest	J	T					
30. Ishares Core Growth Allocation ETF (ADC)	A	Dividend	J	T					
31. Checking Account - BBVA (prev Compass Bank) (ADC Rental)		None	J	T					
32. Pioneer Bond Fund C (MC)	A	Dividend	K	T	Buy	10/15/19	J		
33. Pioneer Bond Fund C (MC)					Buy (add'l)	12/31/19	J		
34. Pioneer Balanced ESG Fund C (previously Classic Balanced Fund C) (MC)	C	Dividend	L	T	Buy	03/21/19	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	
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	(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. Pioneer Balanced ESG Fund C (previously Classic Balanced Fund C) (MC)					Buy (add'l)	06/20/19	J		
36. Pioneer Balanced ESG Fund C (previously Classic Balanced Fund C) (MC)					Buy (add'l)	09/19/19	J		
37. Pioneer Balanced ESG Fund C (previously Classic Balanced Fund C) (MC)					Buy (add'l)	10/15/19	J		
38. Pioneer Balanced ESG Fund C (previously Classic Balanced Fund C) (MC)					Buy (add'l)	11/26/19	J		
39. Pioneer Balanced ESG Fund C (previously Classic Balanced Fund C) (MC)					Buy (add'l)	12/27/19	J		
40. Pioneer Equity Income Fund C (MC)	B	Dividend	K	T	Buy	03/21/19	J		
41. Pioneer Equity Income Fund C (MC)					Buy (add'l)	06/20/19	J		
42. Pioneer Equity Income Fund C (MC)					Buy (add'l)	09/19/19	J		
43. Pioneer Equity Income Fund C (MC)					Buy (add'l)	10/15/19	J		
44. Pioneer Equity Income Fund C (MC)					Buy (add'l)	11/26/19	J		
45. Pioneer Equity Income Fund C (MC)					Buy (add'l)	12/26/19	J		
46. Pioneer Fundamental Growth Fund C (MC)	C	Dividend	K	T	Buy	10/15/19	J		
47. Pioneer Fundatmental Growth Fund C (MC)					Buy (add'l)	11/26/19	J		
48. Pioneer Real Estate Shares C (MC)	C	Dividend	K	T	Buy	03/21/19	J		
49. Pioneer Real Estate Shares C (MC)					Buy (add'l)	10/15/19	J		
50. Pioneer Real Estate Shares C (MC)					Buy (add'l)	11/26/19	J		
51. Pioneer Real Estate Shares C (MC)					Buy (add'l)	12/26/19	J		

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	(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)
52. Pioneer Strategic Income Fund C (MC)	A	Dividend	K	T	Buy	10/15/19	J		
53. Pioneer Strategic Income Fund C (MC)					Buy (add'l)	12/31/19	J		
54. STIFEL BANK PROGRAM FDC INS BK DEP PG (MC)	A	Interest	J	T					
55. FIRST TRUST TCW OPPORTUNISTIC FIXED INCOME ETF (MC)	B	Dividend	L	T	Buy	07/12/19	L		
56. IS SHARES IBOXX \$INVESTMENT GRADE CORP BOND ETF (MC)	A	Dividend	J	T					
57. ISHARES MBS ETF (MC)	B	Dividend	K	T					
58. VANGUARD INTERMEDIATE TERM BOND ETF (MC)	A	Dividend	K	T					
59. SECTOR HEALTHCARE SELECT SECTOR SPDR ETF (MC)	A	Dividend	K	T					
60. SECTOR CONSUMER STAPLES SELECT SECTOR SPDR ETF (MC)	B	Dividend	K	T					
61. CONSUMER DISCRETIONARY SELECT SECTOR SPDR ETF (MC)	A	Dividend	K	T					
62. SECTOR ENERGY SELECT SECTOR SPDR ETF (MC)	A	Dividend			Sold	07/11/19	K	A	
63. SECTOR INDUSTRIAL SELECT SECTOR SPDR ETF (MC)	B	Dividend	L	T					
64. SELECT UTILITIES SELECT SECTOR SPDR ETF (MC)	A	Dividend	K	T					
65. VANGUARD VALUE ETF (MC)	B	Dividend	L	T					
66. VANGUARD GROWTH ETF (MC)	A	Dividend	L	T					
67. VANGUARD FINANCIALS ETF (MC)	B	Dividend	L	T					
68. VANGUARD INFORMATION (MC) TECHNOLOGY ETF	A	Dividend	L	T	Sold (part)	07/11/19	J	D	

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69. VANGUARD COMMUNICATION SERVICES ETF (MC)	A	Dividend	J	T					
70. VICTORY SHARES US EQ INCOME ENH VOLATILITY WTD ETF (MC)	A	Dividend			Sold	07/11/19	J	A	
71. VICTORY SHARES US LARGE CAP HIGH DIV VOLATILITY (MC)	A	Dividend	K	T					
72. VICTORY SHARES US 500 ENHANCED (MC)	A	Dividend	K	T					
73. FIRST TRUST EXCHANGE TRADED FUND VI RISING DIV ACHIEVERS ETF (MC)	A	Dividend	K	T					
74. VANGUARD INTERMEDIATE TERM CORP BOND ETF (LSC)	A	Dividend	J	T					
75. VANGUARD FTSE DEVEL MKTS ETF (LSC)	A	Dividend	J	T					
76. VANGUARD FTSE EMERG MKTS ETF (LSC)	A	Dividend			Sold	07/11/19	J	A	
77. VANGUARD GROWTH ETF (LSC)	A	Dividend	K	T					
78. VANGUARD VALUE ETF (LSC)	A	Dividend	K	T					
79. VANGUARD SMALL CAP ETF (LSC)	A	Dividend	J	T	Sold (part)	07/11/19	J	A	
80. VANGUARD MID CAP ETF (LSC)	A	Dividend	J	T					
81. STIFEL BANK PROGRAM FDIC INS BK DEP PG (LSC)	A	Interest	J	T					
82. VANGUARD INTERMEDIATE TERM BOND ETF (LSC)	A	Dividend	J	T	Sold (part)	07/11/19	J	A	
83. FIRST TRUST TCW OPPORTUNISTIC FIXED INCOME ETF (LSC)	A	Dividend	J	T	Buy	07/12/19	J		
84. Rental Property #10 (Anchorage) Northport, AL	D	Rent	M	W	Buy	08/02/19	M		Wright/Hurd Properties LLC

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85. Bryant Bank Checking Acct (Rental)	A	Int./Div.	K	T	Open	07/12/19	J		
86. Bryant Bank Checking Acct (Regular)		None	J	T	Open	07/12/19	J		
87. [REDACTED] Tuscaloosa, AL-2/3 interest		None	M	W					
88. BBVA Money Market (ADC)	A	Interest	K	T	Open	03/04/19	J		

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

Note:

The prepaid tuition plans are state plans that I have no control over. They are valued at their cost.

The incomes listed for the LLC's and the Ltd are K-1 incomes. The values for these assets are stated at my ownership percentage.

The retirement account listed on line 15 in Part VII constitutes the funds that are available to me due to my payments into my State of Alabama Retirement. When I resigned from the State of Alabama, those funds became availale to me. I have chosen to leave those funds with the State of Alabama Retirement Systems to draw interest on those funds. Before I resigned, the retirement account was an obligation of the State of Alabama Retirement Systems to pay a percentage of my salary once I reached retirement age.

The amounts listed in Part V as gifts are estimated becuase the person providing them is a friend who would not disclose the value of such gifts.

It was discovered in 2019 that an undivided interest in the real estate listed on line 87 was transferred in 2012 to Mitzi H. Coogler as part of [REDACTED] estate plan. A life estate was retained by both her mother and step-father.

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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/ **Lawrence S. Coogler**

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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