

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2018

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) BURNS, MICHELLE H.	2. Court or Organization Phoenix, District Court	3. Date of Report 07/12/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Magistrate Judge full-time	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final	6. Reporting Period 01/01/2018 to 12/31/2018
	5b. ☐ Amended Report	
7. Chambers or Office Address Sandra Day O'Connor Courthouse 401 W. Washinton St. SPC 12 Phoenix, Arizona 85003-2146		
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. 2018	Burns, Nickerson, and Taylor, S-Corp. salary
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. Judiciary	05/22/2018-05/25/2018	Girdwood, AK.	MJ Executive Board Meeting	hotel, transportation, meals
3. Judiciary	06/11/2018-06/13/2018	El Paso, TX	Border Conference	hotel, transportation, meals
4. Judiciary	07/23/2018-07/26/2018	Anaheim, CA	Ninth Circuit Judicial Conf.	transportation, hotel, meals
5. Judiciary	08/25/2018-08/29/2018	Missoula, MO	Chief District Judges & Clerks' Conf.	transportation, hotel, meals
6. Judiciary	09/07/2018-09/08/2018	Tucson, AZ	District Judges Conference	transportation, hotel, meals

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Name of Person Reporting BURNS, MICHELLE H.	Date of Report 07/12/2019
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7.	Judiciary	10/03/2018-10/05/2018	Tucson, CA	MJ Executive Board Meeting	transportation, hotel, meals
8.	Judiciary	10/17/2018-10/19/2018	San Francisco, CA	Ninth Circuit Judicial Council Mtg.	transportation, hotel, 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.		

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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)	(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. Interest Checking Account Bank of America	A	Interest	J	T					
2. Partnership - Burns Fulton	C	Distribution	L	U					
3. Interest checking wells fargo bank	A	Interest	J	T					
4. Fidelity Insvestments Brokerage Account (751)									
5. ---Fidelity Cash Account	A	Interest	K	T					
6. ---Blackrock Emerg Mkts	A	Dividend	J	T					
7. Fidelivy Investments Managed Acct (502)									
8. ---Fid. Intl Small Cap Opp	A	Dividend	J	T					
9. --Fid. Large Cap Stock	A	Dividend			Sold	12/14/18	J		
10. --Fed Adv Mega Cap Stock	A	Dividend	J	T	Buy	12/14/18	J		
11. --Fd. Conservativ Income Muni Bd cl 1	A	Dividend			Sold	01/09/18	J		
12. --Strateg Adv Tax Sensitive SD	A	Dividend	K	T	Buy	01/09/18	K		
13. --Fid Sai Tax Free Bond Fund	A	Dividend	J	T	Buy	10/12/18	J		
14. --Acadian Emerg Mkts Port Invstr	A	Dividend	J	T	Buy	09/10/18	J		
15. ---Lazard Emerging Mkts Equity Op cl shs	A	Dividend	J	T	Sold (part)	01/09/18	J		
16. ---Mainstay Tax Free Bond Cl. A	A	Dividend	J	T	Sold (part)	10/12/18	J		
17. --Mainstay MacKay High Yield Muni Bd	A	Dividend	J	T	Buy	10/12/18	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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18. ---T Rowe Price Tax Free High Yield Adv	A	Dividend	J	T	Buy	12/14/18	J		
19. ---T Rowe Price New Era	A	Dividend	J	T					
20. ---BlackRock Natl Muni Fund	A	Dividend	K	T	Buy (add'l)	03/14/18	J		
21. ---Franklin Fed. Tax Free Cl.	A	Dividend			Sold	10/02/18	K		
22. --IShares MSCI Emerg Mkts ETF	A	Dividend	J	T	Buy	08/09/18	J		
23. ---IShares Russell Midcap Val	A	Dividend	J	T					
24. ---IShares Russel Mdcg Grwth	A	Dividend	J	T					
25. ---IShares Russell 1000 Val.	A	Dividend	K	T					
26. ---IShares Russell 2000 ETF	A	Dividend			Sold	09/11/18	J		
27. ---MFS Internl Value Fund	A	Dividend	K	T					
28. ---SPDR S&P500 EFT Tr Unit	A	Dividend	L	T					
29. ---Sector SPDR TR Shs Ben int	A	Dividend	J	T					
30. ---Tmpltm Global Bond cl A	A	Dividend	J	T					
31. --Vanguard FTSE Dev Mkt EFT	A	Dividend	K	T	Buy	12/17/18	K		
32. --Vanguard Sector Index FDS	A	Dividend	J	T	Buy	03/21/18	J		
33. --Vanguard Long Term Tax Expt Adm	A	Dividend	K	T	Buy	05/01/18	K		
34. --Vanguard Index FDS Midcap Growth	A	Dividend	K	T	Buy	03/27/18	J		

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35. --Vanguard Index FDS Small Cap	A	Dividend	J	T	Buy	03/27/18	J		
36. --Vanguard Index FDS Growth	A	Dividend	K	T	Buy	01/10/18	K		
37. --Vanguard Index FDS Value	A	Dividend	K	T	Buy	03/27/18	K		
38. --Vanguard Index FDS Small Cap	A	Dividend	J	T	Buy	03/17/18	J		
39. ---Wells Fargo Muni	A	Dividend	K	T	Buy	01/09/18	J		
40. ---Artisan Int' Value Fund	A	Dividend	J	T					
41. ---Oppenheimer Intl Bnd fd	A	Dividend	J	T	Buy	01/09/18	J		
42. ---TRowe Price RealEst fnd	A	Dividend	J	T					
43. ---Oppenhmer Dev Mkts fd	A	Dividend	J	T					
44. ---Acadian Emg Mkts Port Invstr	A	Dividend	J	T					
45. ---Harbor Int'l	A	Dividend			Sold	09/10/18	J		
46. --Oakmark Fund Investor Cl	A	Dividend	K	T	Buy	07/06/18	K		
47. ---T-Rowe Pc Int'l stock	A	Dividend	J	T					
48. --Wasatch Frontier Emerging Small Cos	A	Dividend			Sold	09/06/18	J		
49. --Wells Fargo Special Mid Cap ADM	A	Dividend			Sold	09/10/18	J		
50. --Fidelity Municipal Money Mkt	A	Dividend	J	T					
51. --IShares Russell 1000 Growth ETF	A	Dividend	K	T					

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52. --IShares S&P Smallcap 600 Value	A	Dividend			Sold	09/11/18	J		
53. --IShares S&P Smallcap 600 Growth ETF	A	Dividend	J	T					
54. --IShares Tr Eafe SML CP ETF	A	Dividend	J	T	Buy	09/11/18	J		
55. IRA #1 (695)									
56. --Fidelity Small Cap	A	Dividend	J	T					
57. --Fidelity ContraFund	A	Dividend	K	T					
58. --Fidelity Equity Income	A	Dividend	J	T					
59. --Fidelity Dividend Growth	A	Dividend	J	T					
60. --Fidelity Export and intern'l	A	Dividend	J	T					
61. --Fidelity int'l discovery	A	Dividend	J	T					
62. --Nokia OYJ ADR	A	Dividend	J	T					
63. --Fidelity Cash Reserves	A	Interest	J	T					
64. --Yum! Brank Inc.	A	Dividend	K	T					
65. --Mathews China Fund	A	Dividend	J	T					
66. --Cisco SysInc	A	Dividend	J	T					
67. --General Electric	A	Dividend	J	T					
68. --Fidelity NASDAQ Composite INDEX	A	Dividend	J	T					

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69. --Fidelity Large Cap Value Enhanced Index	A	Dividend	J	T					
70. --/Fidelity Equity Divident Income Fund	A	Dividend	J	T					
71. --VAanguard 500 Index FD Investor SHS	A	Dividend	K	T					
72. IRA #2 (687)									
73. --Fidelity Contrafund	A	Dividend	K	T					
74. --Fidelity Equity Income	A	Dividend	J	T					
75. --Fidelity Equity Income II	A	Dividend	J	T					
76. ---Fidelity 500 Index Premium C;ass	A	Interest	K	T					
77. IRA #3 (R-840)									
78. --Spartan 500 Index FD Advantage Class	A	Interest	J	T					
79. --Intel Corp.	A	Dividend	J	T					
80. IRA #4 (R - 832)									
81. --Fidelity Cash Reserves	A	Interest	J	T					
82. IRA #5 (SEP 709)					Sold	04/30/15	M		
83. --Fidelity Stock Selector	A	Dividend							
84. --Fidelity Asset Mgr	A	Dividend							
85. --Fidelity ContraFund	A	Dividend							

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86. --Fidelity Low Price Stock	A	Dividend							
87. --Fidelity Value Fund	A	Dividend							
88. --Fidelity Cash Reserves	A	Interest							
89. Fidelity SEP IRA Managed Account (053)									
90. ---Fid. SAI US Large Cap Index	A	Dividend	J	T					
91. ---Fid. SAI Intern'l Index	A	Dividend	J	T					
92. ---Fid. SAI Emerg Markets Index	A	Dividend	J	T					
93. ---FIMM Govt. Portfolio Inst Cl	A	Dividend	J	T					
94. ---AQR Managed Futures Fund CL N.	A	Dividend	J	T					
95. ---Eaton Vance GL Macro Absolute RTRN	A	Dividend	J	T					
96. ---Strategic Advrs Core Fnd	A	Dividend	L	T					
97. ---Strategic Advrs Grwth Fnd	A	Dividend	K	T					
98. ---Strategic Advrs Value Fnd	A	Dividend	K	T					
99. ---Strategic Advrs Emrng mkts	A	Dividend	K	T					
100. ---Strategic Advrs us oppt fnd	A	Dividend	J	T					
101. ---Strategic Adv smll-mid cap	A	Dividend	K	T					
102. ---Strategic Advrs Internl fnd	A	Dividend	L	T					

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(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	
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103. ---Strategic Adv shrt durtn fnd	A	Dividend	J	T	Sold (part)	02/13/18	J		
104. ---Strategic Adv income oppty	A	Dividend	J	T					
105. ---Strategic Adv core incm fnd	A	Dividend	L	T					
106. ---Pimco total rtnn admin shs	A	Dividend	J	T					
107. IRA #6									
108. --Blackrock Glbal	A	Dividend	K	T					
109. Nationwide Retirement Solutions - deferred compensation acct									
110. --Fidelity Contrafund	A	Dividend			Sold	06/11/14	M		
111. --State Str. Eq S&P 500	A	Dividend			Sold	06/11/14	M		
112. --Vanguard 500 Index Fund	A	Dividend	N	T	Buy	06/11/14	N		
113. Fidelity 529 Education Account (773)									
114. --NH Portfolio 2015	A	Dividend			Distributed	01/12/18	J		
115.									
116.									

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

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Name of Person Reporting

BURNS, MICHELLE H.

Date of Report

07/12/2019

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

Regarding Part VII, lines 109 to 112. Due to oversight, I did not realize the funds in my husband's deferred compensation/retirement account created by my husband's prior employer, had changed from the Fidelity Contra and State S&P 500 investments to the Vanguard investment. I was able to determine that the change from the State S&P fund occurred on the date listed in 2014, but am not sure when the Contra Fund was omitted, as statements older than 2013 are not available online. If necessary, I could obtain that information.

Also, regarding Part VII, line 82. Due to oversight, I did not previously report that this SEP account was consolidated with my managed SEP account, ending in -053 (line 89) in 2016.

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

BURNS, MICHELLE H.

Date of Report

07/12/2019

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/ MICHELLE H. BURNS**

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