

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) Dodge, Patricia L.	2. Court or Organization U.S District Court, Western District of Pennsylvania	3. Date of Report 08/16/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Magistrate Judge - Full Time	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 U.S. District Court 700 Grant Street Suite 9210 Pittsburgh, PA 15219		
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. Partner- through June 2, 2019	Meyer, Unkovic & Scott LLP
2. Board Member - all of 2019	National Aviary
3. President-Board of Trustees - through June 30, 2019	Allegheny County Bar Foundation
4. Trustee and Immediate Past President - July 1, 2019- December 31, 2019	Allegheny County Bar Foundation
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. 2019	Meyer, Unkovic & Scott LLP buyout of Partnership interest
2.	
3.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 9

Name of Person Reporting

Dodge, Patricia L.

Date of Report

08/16/2021

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	Meyer, Unkovic & Scott LLP, partner net income	\$265,239.00
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	Goehring, Rutter & Boehm Law Office - Shareholder compensation
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.				

FINANCIAL DISCLOSURE REPORT

Page 3 of 9

Name of Person Reporting

Dodge, Patricia L.

Date of Report

08/16/2021

V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*

☐

NONE *(No reportable gifts.)*

<u>SOURCE</u>	<u>DESCRIPTION</u>	<u>VALUE</u>
1. Allgheny County Bar Association	Invitations for Investiture	\$802.32
2. Meyer,Unkovic & Scott, LLP	Food for Investiture Reception	\$6,518.00
3.		
4.		
5.		

VI. LIABILITIES. *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*

☒

NONE *(No reportable liabilities.)*

<u>CREDITOR</u>	<u>DESCRIPTION</u>	<u>VALUE CODE</u>
1.		
2.		
3.		
4.		
5.		

FINANCIAL DISCLOSURE REPORT

Page 4 of 9

Name of Person Reporting

Dodge, Patricia L.

Date of Report

08/16/2021

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. Goehring, Rutter & Boehm Retirement Plan (H)									
2. JH Multimanager 2025 Lifetime	G	Int./Div.	O	T	Buy (add'l)	03/01/19	J		
3.					Buy (add'l)	10/01/19	K		
4. McDonalds common stock	A	Dividend	J	T					
5. Meyer Unkovic & Scott LLP 401K(H)									
6. HC Capital Trust Core Fixed Income	C	Dividend	M	T	Buy (add'l)	03/15/19	J		
7. HC Cap Tr-Institutional Internal Eq Ins	D	Dividend	M	T	Buy (add'l)	03/15/19	J		
8. HC Capital Trust Inst U.S Equity	E	Dividend	M	T	Buy (add'l)	03/15/19	J		
9. HC Capital Trust Inst Value Equity	D	Dividend	M	T	Buy (add'l)	03/15/19	J		
10. HC Capital Trust Inst Small Cap Equity	E	Dividend	M	T	Buy (add'l)	03/15/19	J		
11. HC Capital Trust-The Emerge Markets Inst	B	Dividend	L	T	Buy (add'l)	03/15/19	J		
12. Meyer Unkovic & Scott LLP equity owner-Sale partnership interest	E	Distribution			Sold	05/31/19	M		Meyer Unkovic & Scott LLP-
13. Meyer Unkovic & Scott LLP dividends law firm	A	Dividend		T					
14. Meyer Unkovic & Scott LLP interest law firm	A	Interest		T					
15. Note Receivable-Meyer,Unkovic & Scott LLP		None	M	U					
16. Oppenheimer & Co Investment Account (H)									
17. Advantage Bank Deposit	A	Interest	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	

FINANCIAL DISCLOSURE REPORT

Page 5 of 9

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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)
18. Apple INC	A	Dividend	K	T					
19. Borgwarner INC	A	Dividend	J	T					
20. CVS Health Corp	A	Dividend	J	T					
21. Conocophillips	A	Dividend	J	T					
22. Darden Restaurants INC	A	Dividend	J	T					
23. Dominion Energy	A	Dividend	K	T					
24. Murphy Oil Corp	A	Int./Div.	K	T					
25. National Storage Affiliates TR Com SHS Ben In Reit	A	Dividend	K	T					
26. Verizon Communications INC	A	Dividend	K	T					
27. Weyerhaeuser Co Reit		None	J	T	Buy	12/10/19	J		
28. PNC Cash account #1		None	K	T					
29. PNC Cash account #2	A	Interest	M	T					
30. PNC Investments IRA#1 (H)									
31. American Century Mid Cap Value	A	Dividend	J	T					
32. Calvert Emerging Markets	A	Dividend	J	T	Buy	08/08/19	J		
33. Delaware Value	A	Dividend	K	T					
34. Federated Hermes Total Return Bond	B	Int./Div.	L	T	Buy (add'l)	04/01/19	J		

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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 6 of 9

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35. Invesco Emerging Markets All Cap	A	Dividend	J	T					
36. Invesco Oppenheimer International Gr	A	Dividend	K	T	Buy (add'l)	08/08/19	J		
37. JP Morgan Large Cap Growth	B	Dividend	J	T					
38. Lazard Global Listed Infrastructure	A	Dividend	J	T					
39. MFS Value	A	Dividend	K	T					
40. PGIM Jennison Growth	A	Dividend	J	T					
41. PGIM Total Return Bond	D	Dividend	M	T	Buy (add'l)	04/01/19	K		
42. T Rowe Price International Discovery	A	Dividend	J	T	Buy	08/08/19	J		
43. T Rowe Price Mid Cap Growth	A	Dividend	J	T					
44. T Rowe Price Real Estate	A	Dividend	J	T					
45. PNC Investments IRA#2 (H)									
46. IShares	A	Dividend	K	T	Buy (add'l)	08/09/19	J		
47. Lazard Global Listed Infrastructure	A	Dividend	J	T					
48. SPDR Dow Jones REIT ETF	A	Dividend	J	T					
49. T Rowe Price International Discovery	A	Dividend	J	T	Buy	08/09/19	J		
50. Vangaurd FTSE Emerging Markets	A	Dividend	J	T	Buy	08/09/19	J		
51. Vanguard Mega Cap Growth ETF	A	Dividend	K	T					

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52. Vanguard Mega Cap Value ETF	B	Dividend	L	T					
53. Vanguard Mid Cap Growth ETF	A	Dividend	J	T					
54. Vanguard Mid Cap Value ETF	A	Dividend	J	T					
55. Vanguard Total Bond Market ETF	D	Int./Div.	N	T	Buy (add'l)	04/01/19	K		
56. Restaurant Brands common stock	A	Dividend	J	T					
57. Wendy's common stock	A	Dividend	J	T					

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FINANCIAL DISCLOSURE REPORT

Page 8 of 9

Name of Person Reporting

Dodge, Patricia L.

Date of Report

08/16/2021

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

Part VII Investments and Trusts

Line 6 and Line 7 were not reported on the initial report. The value in these two funds were sold in 2020 prior to the June 30, 2020 initial report date.
The sales of these two funds will be reported on the 2020 Financial Disclosure Form

FINANCIAL DISCLOSURE REPORT

Page 9 of 9

Name of Person Reporting

Dodge, Patricia L.

Date of Report

08/16/2021

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/ Patricia L. Dodge**

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