

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) Moberly, Robyn L.	2. Court or Organization U.S. Bankruptcy Court for the Southern District of Indiana	3. Date of Report 08/11/2020
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Bankruptcy Judge - Active	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 317 Birch Bayh Federal Building and Federal Courthouse 46 East Ohio Street Indianapolis, Indiana 46204		
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. Member	Board of Visitors of The Indiana University McKinney School of Law
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. 2004	Indiana State Judiciary Vested Pension (defined benefit pension plan)
2.	
3.	

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Name of Person Reporting

Moberly, Robyn L.

Date of Report

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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	Indiana State Judiciary Vested Pension	\$76,505.00
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	Self-employed (attorney)
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.				

Name of Person Reporting	Date of Report
Moberly, Robyn L.	08/11/2020

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.		

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. Individual Assets (H)									
2. Regions Banks (cash)	A	Interest	L	T					
3. Moberly Investments LLC	B	Royalty	L	U					
4. IRA #1 (H)									
5. Oppenheimer Rising Dividends Fund Class A (OARDX)	A	Dividend			Sold	10/10/19	J		
6. Oppenheimer Capital Appreciation Fund Class A (OPTFX)		None			Sold	10/10/19	J		
7. Oppenheimer Main Street Fund Class A (MSIGX)		None			Sold	10/10/19	K		
8. Oppenheimer International Growth Fund Class A (OIGAX)		None			Sold	10/10/19	J		
9. IRA #2 (H)									
10. Value Line Larger Companies Fund	D	Dividend	L	T					
11. IRA #3 (H)									
12. Value Line Larger Companies Fund	D	Dividend	L	T					
13. IRA #4 (H)									
14. Bank Of America, NA (cash)	A	Interest	K	T					
15. Apple Inc (AAPL)	A	Dividend	L	T					
16. Avanos Medical Inc Reg (AVNS) (Y)									
17. Cigna Corp Reg SHS (CI)		None	J	T					

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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	(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)
18. Coca Cola Com (KO)	A	Dividend	K	T					
19. Eli Lilly & Co (LLY)	A	Dividend	K	T					
20. Intl Business Machines (IBM)	B	Dividend	K	T					
21. Kimberly Clark (KMB)	A	Dividend	K	T					
22. Merk and Co Inc Shs (MRK)	A	Dividend	K	T					
23. American Capital World Growth & Income (CWGFX)	A	Dividend	K	T					
24. American Growth Fund of American (GFAFX)	B	Dividend	K	T					
25. Clearbridge Aggressive Growth Fund (SHRAX) (Y)									
26. IRA #5 (H)									
27. Bank of America, NA (cash)	A	Interest	K	T					
28. Alphabet inc SHS (GOOG)		None	M	T					
29. Apple Inc (AAPL)	A	Dividend	L	T					
30. Coca Cola Com (KO)	A	Dividend	K	T					
31. Eli Lilly & Co (LLY)	A	Dividend	K	T					
32. Intl Business Machines (IBM)	A	Dividend	J	T					
33. Merk and Co Inc SHS (MRK)	A	Dividend	J	T					
34. American Capital World Growth & Income (CWGFX)	A	Dividend	K	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.)

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35. American Growth Fund of American (GFAFX)	B	Dividend	K	T					
36. American Capital Income Builder FD (CIBFX)	A	Dividend	K	T					
37. Clearbridge Aggressive Growth Fund (SHRAX)	B	Dividend	K	T					
38. IRA #6 (H)									
39. Doubleline Total Return (DLTNX)	A	Dividend	J	T	Buy	10/10/19	J		
40. Artisan Intl Fund Inv (ARTIX)	A	Dividend	J	T	Buy	10/10/19	J		
41. Schwab S&P 500 Index Fd (SWPPX)	A	Dividend	J	T	Buy	10/10/19	J		
42. IRA #7 (H)									
43. Carillon Reams Unconstrained BD (SUBYX)	A	Dividend	J	T	Buy	10/10/19	J		
44. Doubleline Total Return BD (DLTNX)	A	Dividend	J	T	Buy	10/10/19	J		
45. Pioneer Strategic Income (STRYX)	A	Dividend	J	T	Buy	10/10/19	J		
46. Artisan Intl Fund Inv (ARTIX)	A	Dividend	J	T	Buy	10/10/19	J		
47. Fuller & Thaler Behavioral Sm Cap (FTHNX)	A	Dividend	J	T	Buy	10/10/19	J		
48. Januus Henderson Enterprise (JAENX)	A	Dividend	J	T	Buy	10/10/19	J		
49. Janus Henderson Glbl Real Estate (JERTX)	A	Dividend	J	T	Buy	10/10/19	J		
50. JHancock Disciplined Mid Cap Value (JVMAX)	A	Dividend	J	T	Buy	10/10/19	J		
51. JPMorgan Hedged Eqty Fd (JHQAX)	A	Dividend	J	T	Buy	10/10/19	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	
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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52. Matthews Asia Dividend Fund (MAPIX)	A	Dividend	J	T	Buy	10/10/19	J		
53. MFS Intl New Discovery A	A	Dividend	J	T	Buy	10/10/19	J		
54. Schwab S&P 500 Index FD (SWPPX)	A	Dividend	K	T	Buy	10/10/19	J		
55. William Blair Small Cap Growth (WBSNX)	A	Dividend	J	T	Buy	10/10/19	J		
56. Brokerage #1 (H)									
57. Schwab One Sweep Acct (cash)	A	Interest	L	T					
58. Schwab Value Advantage (SWVXX)	A	Dividend	K	T	Buy	05/24/19	K		
59. CIT Bank (cash)	A	Interest			Closed	05/20/19	K		
60. American Express (cash)	A	Interest			Closed	12/16/19	K		
61. Synchrony Bank (cash)	A	Interest	J	T					
62. AT&T Inc (T)	D	Dividend	M	T					
63. Amer Electric Pwr Co (AEP)	A	Dividend	J	T					
64. Auto Data Processing (ADP)	A	Dividend	J	T					
65. Chevron Corp (CVX)	D	Dividend	M	T					
66. Cisco Systems Inc (CSCO)	A	Dividend	J	T					
67. Emerson Electric Co (EMR)	A	Dividend	J	T					
68. Exxon Mobile Corp (XOM)	B	Dividend	K	T					

1 Income Gain Codes: (See Columns B1 and D4)	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	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	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	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

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)
69. Honeywell Intl Inc (HON)	A	Dividend	J	T					
70. IBM Corp (IBM)	A	Dividend	K	T					
71. Johnson & Johnson (JNJ)	A	Dividend	J	T					
72. Microsoft Corp (MSFT)	A	Dividend	J	T					
73. Nuveen Quality Municipal (NAD)	A	Dividend	J	T					
74. Proctor & Gamble (PG)	A	Dividend	J	T					
75. Qualcomm Inc (QCOM)	A	Dividend	J	T					
76. Raytheon Co (RTN)	A	Dividend	J	T					
77. Southwest Airlines (LUV)	A	Dividend	J	T					
78. Target Corp (TGT)	A	Dividend	J	T					
79. Texas Instruments (TXN)	A	Dividend	J	T					
80. The Coca Cola Co (KO)	A	Dividend	J	T					
81. Union Pacific Corp (UNP)	A	Dividend	J	T					
82. United Technologies (UTX)	A	Dividend	J	T					
83. Verizon Communicatn (VZ)	A	Dividend	J	T					
84. Wal-mart Stores (WMT)	A	Dividend	J	T					
85. 3M Co (MMM)	A	Dividend	J	T					

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

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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

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NONE (No reportable income, assets, or transactions.)

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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)
86. IShares Russell Mid Cap Growth ETF (IWP)	A	Dividend	K	T					
87. IShares Russell Mid Cap Value ETF (IWS)	A	Dividend	K	T					
88. Carillon Reams Unconstrained BD (SUBFX)	A	Dividend	K	T	Buy	05/24/19	K		
89. AB Sustainable Global Thematic A (ALTFX)	A	Dividend	J	T					
90. DFA Intl Value Port Instl (DFIVX)	A	Dividend	K	T					
91. Fuller & Thaler Behavioral Sm Cap Eqty (FTHSX)	A	Dividend	L	T					
92. Primecap Odyssey Growth (POGRX)	B	Dividend	K	T					
93. T Rowe Price Gwth Stock (PRUFX)	A	Dividend	K	T					
94. Vanguard Value Index Admiral Share (VVIAX)	B	Dividend	L	T					
95. Public Storage REIT (PSA)	B	Dividend	L	T					
96. Brokerage #2 (H)									
97. Schwab Value Advantage (SWVXX)	A	Dividend	K	T	Open	10/09/19	K		
98. Carillon Reams Unconstrained BD (SUBYX)	A	Dividend	J	T	Buy	12/23/19	J		
99. Doubleline Total Return BD (DLTNX)	A	Dividend	J	T	Buy	12/23/19	J		
100. Pioneer Strategic Income (STRYX)	A	Dividend	J	T	Buy	12/23/19	J		
101. Artisan Intl Fund Inv (ARTIX)	A	Dividend	J	T	Buy	10/09/19	J		
102.					Buy (add'l)	12/23/19	J		

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103. Janus Henderson Glbl Real Estate (JERTX)		None	J	T	Buy	12/23/19	J		
104. JPMorgan Hedged Eqty Fd (JHQAX)		None	J	T	Buy	12/23/19	J		
105. Schwab S&P 500 Index FD (SWPPX)	A	Dividend	J	T	Buy	10/09/19	J		

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

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(See Column C2)

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

Moberly Investments LLC includes a small collection of oil and mineral rights in Texas, Oklahoma, and New Mexico; no control.

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value, per page 42 of the filing instructions.

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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/ **Robyn L. Moberly**

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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