

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2020

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) Burris, Helen E.	2. Court or Organization US Bankruptcy Court, DSC	3. Date of Report 04/28/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) US Bankruptcy Judge- Full time	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final	6. Reporting Period 01/01/2020 to 12/31/2020
	5b. ☐ Amended Report	
7. Chambers or Office Address Federal Courthouse 201 Magnolia Street Spartanburg, SC 29306		
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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Name of Person Reporting

Burris, Helen E.

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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. 2020	The Law Office of Eric K. Englebardt, LLC (this entity owns 50% of Wilson & Englebardt, LLC)(attorneys)
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.	South Carolina Bar	1/23/20-1/25/20	Columbia SC	Bar Convention	registration waived
2.	National Association of Chapter 13 Trustees	7/8/20-7/10/20	virtual	speaking engagement and seminar	registration for virtual seminar waived
3.	South Carolina Bankruptcy Law Association	9/4/20	virtual	seminar	registration for virtual seminar waived
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.		
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. American Express	credit card	K
2.		
3.		
4.		
5.		

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Name of Person Reporting

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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. South State Bank - Accounts	A	Interest	K	T					
2. Allianz 222 Annuity (H)									
3. -AnPtPtw/cap- Bloomberg US Dynamic Balance Index II	C	Interest	M	T					
4. -MoSum Russell 2000 Index Monthly Sumw/cap	A	Int./Div.	K	T					
5. NW Mutual Whole Life Cash Value #1	C	Dividend	M	T					
6. Fidelity Freedom 2030 Fund (FFEX)	E	Int./Div.	O	T					
7. Presidio Property Trust, Inc.	A	Int./Div.	J	T					
8. Rental Property #1 Greenville South Carolina	D	Rent	L	W					
9. Future Scholar 529 College Savings Plan (2) (H)									
10. -FS Mod Conserv (no control)	A	Int./Div.			Distributed	05/13/20	J		
11. -FS Mod Growth Port Static (no control)	A	Int./Div.			Distributed	05/13/20	J		
12. TD Ameritrade Institutional (H)									
13. -Ishares Core S&P Mid-Cap ETF(IJH)	A	Int./Div.	J	T	Buy (add'l)	03/06/20	J		
14. -Ishares Core S&P Small-Cap ETF (IJR)	A	Int./Div.	J	T	Buy (add'l)	03/06/20	J		
15. -Ishares Floating Rate Bond ETF (FLOT)	A	Int./Div.	J	T	Sold (part)	04/17/20	J	A	
16. -Cont'd					Sold (part)	10/16/20	J	A	
17. -Vanguard FTSE Developed Markets ETF (VEA)	A	Int./Div.	K	T	Buy (add'l)	02/27/20	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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18. -Cont'd					Buy (add'l)	03/06/20	J		
19. -Cont'd					Sold (part)	05/14/20	J	A	
20. -Vanguard Emerging Markets ETF (VWO)	A	Int./Div.	K	T	Buy (add'l)	01/15/20	J		
21. -Cont'd					Sold (part)	05/14/20	J	A	
22. -Vanguard Index Funds S&P 500 ETF (VOO)	A	Int./Div.	L	T	Sold (part)	03/06/20	J	A	
23. -SPDR Series Trust Short Term High Yield Bond ETF (SJNK)	A	Int./Div.	J	T	Sold (part)	01/15/20	J	A	
24. -Cont'd					Buy (add'l)	05/14/20	J		
25. -SPDR FTSE PORTFOLIO INTRMD ETF (SPIB)	A	Int./Div.	J	T	Sold (part)	03/06/20	J	A	
26. -Cont'd					Buy (add'l)	09/23/20	J		
27. -Vanec Vectors JP Morgan MKTS ETF (EMLC)	A	Int./Div.			Sold	10/16/20	J	A	
28. -Vanguard Mort-Back Sec ETF (VMBS)	A	Int./Div.	J	T	Sold (part)	03/06/20	J	A	
29. -Cont'd					Buy (add'l)	10/16/20	J		
30. -Index IQETF Trust IQMrgr ARB Etf (MNA)	A	Int./Div.	J	T	Buy (add'l)	09/23/20	J		
31. -ETF Series Solutions US GLB JETS ETF (JETS)	A	Int./Div.		T	Buy	03/06/20	J		
32. -Cont'd					Buy (add'l)	04/17/20	J		
33. -Cont'd					Sold	07/24/20	J	A	
34. -Invesco QQQ Trust Unit Ser 1 ETF (QQQ)	A	Int./Div.	J	T	Buy	05/14/20	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)
35. -Cont'd					Buy (add'l)	09/23/20	J		
36. -Select Sector SPDR Trust SBI INT-INDS ETF (XLI)	A	Int./Div.			Buy	07/24/20	J		
37. -Cont'd					Sold	09/23/20	J	A	
38. -Ishares Trust 3 7 Yr Treas Bd ETF (IEI)	A	Int./Div.	J	T	Buy	10/16/20	J		
39. Community National Bank IRA	A	Interest	J	T					
40. Griffin Inst Success RE FdCLC	A	Int./Div.	K	T					
41. 2nd home Boone, North Carolina	D	Rent	N	W					
42. American Funds (H)									
43. -The Growth Fund of America C (305)	A	Int./Div.	K	T					
44. -Fundamental Investors C (310)	A	Int./Div.	K	T					
45. -American Balanced Funds C (311)	A	Int./Div.	K	T					
46. -New World Fund C (336)	A	Int./Div.	K	T					
47. -Europacific Growth Fund C (316)	A	Int./Div.	K	T					
48. -American Funds U.S. Government Money Market Fund A (59)	A	Int./Div.	L	T	Buy	07/07/20	L		

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

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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/ **Helen E. Burris**

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