

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) Burgess, Timothy M.	2. Court or Organization U.S. District Court, Anchorage, AK	3. Date of Report 7/28/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Chief Judge, Active	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 U.S. District Court 222 W. 7th Ave. Box 33 Anchorage, AK 99513		
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. Co-Trustee	Trust #1
2. Co-Trustee	Trust #2
3. Power of Attorney	Family Member
4. Co-Trustee	Trust #3
5. Co-Trustee	Trust #4

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.	
2.	
3.	

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Burgess, Timothy M.

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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. 2020	State of Alaska: Alaska Permanent Fund Dividend	\$992.00
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. 2020	State of Alaska, 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.				
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.		
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. CitiBank	Credit Card	J
2.		
3.		
4.		
5.		

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Name of Person Reporting

Burgess, Timothy M.

Date of Report

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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. Wells Fargo Bank, Accounts	A	Int./Div.	J	T					
2. Credit Union 1, Accounts	A	Int./Div.	J	T					
3. IRA #1 (H)									
4. -FA STGC Div & Inc FCSDX (X)	A	Dividend	J	T					
5. -Fidelity Adv Biotechnology FBTCX (X)	A	Dividend	J	T					
6. -Fidelity Adv Int'l Capital App FCPCX (X)		None	J	T					
7. -Fidelity Adv New Insights FNICX (X)	A	Dividend	J	T					
8. -Fidelity Adv Semiconductors FELCX (X)	A	Dividend	J	T					
9. -Fidelity Adv Strategic Income FSRCX (X)	A	Dividend	J	T					
10. IRA #2 (H)									
11. -FRK Biotechnology Dis Fund FBDIX (X)	A	Dividend	J	T					
12. IRA #3 (H)									
13. -Franklin Growth Fund FKGRX (X)	A	Dividend	J	T					
14. IRA #4 (H)									
15. -American Funds Fundamental Investors ANCFX (X)	B	Dividend	L	T					
16. -American Funds New Perspective Fund ANWPX (X)	C	Dividend	M	T					
17. IRA #5 (H)									

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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Name of Person Reporting

Burgess, Timothy M.

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7/28/2021

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)
18. -Putnam Global Health Care PHSTX (X)	A	Dividend	J	T					
19. Jackson National Life Variable Annuity (H)									
20. -1 yr Guaranteed Account (X)	A	Interest	K	T					
21. -JNL/American New World (X)		None	J	T					
22. -JNL/Loomis Sayles Globa lGrowth (X)		None	J	T					
23. -JNL/Mellon Dow Index (X)		None	J	T					
24. -JNL/Mellon Healthcare Sector (X)		None	J	T					
25. -JNL/PPM Amercia High Yield Bond (X)		None	K	T					
26. -JNL/T Rowe Price Value (X)		None	J	T					
27. Trust #1 (H)									
28. -Pioneer High Yield Fund A (X)	B	Dividend	K	T					
29. -Pioneer Global High Yield Fund A (X)	B	Dividend	K	T					
30. -Wells Fargo Checking Account (X)		None	J	T					
31. Trust #2 (H)									
32. -Rental Property, San Mateo County, CA (X)	E	Rent	O	W					
33. -Rental Property, Santa Clara County, CA (X)	E	Rent	O	W					
34. -Franklin Growth Opportunities Fund (X)		None			Sold	07/24/20	K	D	

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35. -Wells Fargo Bank Accounts (X)	A	Interest	O	T					
36. Trust #3(H)									
37. -Rental Property, Santa Clara County, CA (X)	E	Rent	O	W					
38. -Rental Property, San Mateo County, CA (X)	D	Rent			Sold	09/30/20	O	E	Drac and Kathryn Wigo
39. -Wells Fargo Check Account (X)		None	J	T					
40. Trust #4(H)									
41. -Rental Property, San Mateo County, CA (X)	C	Rent			Sold	09/30/20	N	E	Drac and Kathryn Wigo

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

Assets that include an "X" denote assets that I inherited or became a beneficial owner of during the reporting period.

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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/ Timothy M. Burgess**

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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