

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) Oldshue Jr., Jerry C.	2. Court or Organization Alabama Southern District Bankruptcy Court	3. Date of Report 05/11/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Bankruptcy Judge	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 United States Bankruptcy Court 201 St. Louis Street Mobile, AL 36602-6602		
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

Oldshue Jr., Jerry C.

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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.)*

DATE

SOURCE AND TYPE

INCOME

(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.)*

DATE

SOURCE AND TYPE

1.

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.)*

SOURCE

DATES

LOCATION

PURPOSE

ITEMS PAID OR PROVIDED

1.

2.

3.

4.

5.

Name of Person Reporting	Date of Report
Oldshue Jr., Jerry C.	05/11/2021

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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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)	(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. Account #1 (H)									
2. MORGAN STANLEY BANK N.A. (cash) (Y)									
3. AMER CENT EMERG MKTS I (AMKIX)	A	Dividend	K	T	Buy (add'l)	03/05/20	J		
4.					Buy (add'l)	03/09/20	J		
5.					Sold (part)	03/12/20	J		
6. BLACKROCK HI YIELD BD PTF INST (BHYIX)	A	Dividend	K	T	Buy	05/18/20	K		
7. BLACKROCK INFLAT PROT BOND I (BPRIX)	A	Dividend			Sold	05/18/20	J	A	
8. BNY MELLON NATURAL RESOURCES I (DLDRX)	A	Dividend	J	T	Buy (add'l)	03/12/20	J		
9.					Sold (part)	05/18/20	J		
10. COLUMBIA SELECT LG CAP GROWTH I (UMLGX)	C	Dividend	K	T	Buy (add'l)	03/05/20	J		
11. COLUMBIA SELECT LG CAP VAL I (CSVZX)	B	Dividend	K	T	Buy (add'l)	02/24/20	J		
12.					Buy (add'l)	03/05/20	J		
13.					Buy (add'l)	03/09/20	J		
14. DIAMOND HILL LONG-SHORT I (DHLSX)	A	Dividend	K	T	Buy (add'l)	02/24/20	J		
15.					Buy (add'l)	03/12/20	J		
16. GOLDMAN SACHS GQG INTL OPP I (GSIMX)	A	Dividend	K	T	Buy	05/18/20	K		
17. GUGGENHEIM TOTAL RETURN BD I (GIBIX)	B	Dividend	K	T	Buy (add'l)	02/21/20	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.					Buy (add'l)	03/12/20	J		
19.					Sold (part)	05/18/20	K	A	
20. HARBOR INTERNATIONAL INST (HAINX)	A	Dividend	K	T					
21. INVESCO DIVERSIFIED DIVIDEND Y (LCEYX)	A	Dividend	J	T					
22. INVESCO SMALL CAP VALUE Y (VSMIX)		None			Sold	05/18/20	J		
23. JANUS HENDERSON ENTERPRISE I (JMGRX)	B	Dividend	K	T	Buy (add'l)	02/24/20	J		
24.					Buy (add'l)	03/05/20	J		
25.					Buy (add'l)	03/09/20	J		
26. JANUS HENDERSON INTL MNG VOL I (JMIIX)		None			Buy (add'l)	02/24/20	J		
27.					Sold	05/18/20	K		
28. JANUS HENDERSON INTL OPP I (HFOIX)	A	Dividend	K	T	Buy (add'l)	02/24/20	J		
29. JANUS HENDERSON RESEARCH I (JRAIX)	A	Dividend	K	T	Buy (add'l)	03/05/20	J		
30.					Buy (add'l)	03/09/20	J		
31. JPMORGAN MID CAP VALUE I (JMV SX)	B	Dividend	K	T	Buy (add'l)	03/12/20	J		
32. JPMORGAN SMALL CAP BLEND I (JDSCX)	A	Dividend	J	T					
33. LOCORR MACRO STRATEGIES I (LFMIX)	B	Dividend	K	T	Buy (add'l)	02/21/20	J		
34. NUVEEN SMALL CAP VALUE FUND I (FSCCX)	A	Dividend	K	T	Buy	05/18/20	K		

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
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	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. PGIM JENNISON GROWTH Z (PJFZX)	A	Dividend	J	T	Buy (add'l)	03/09/20	J		
36. PIONEER MLTI AST ULT SHT INC Y (MYFRX)	A	Dividend			Sold	05/18/20	J		
37. PIMCO COMM REAL RET STRAT I2 (PCRPX)	B	Dividend	J	T	Buy	05/19/20	J		
38. VICTORY RS VALUE Y (RSVYX)	A	Dividend	J	T	Buy (add'l)	03/05/20	J		
39. VICTORY SOPHUS EMERG MKTS Y (RSENX)	A	Dividend	K	T	Buy (add'l)	02/24/20	J		
40.					Buy (add'l)	03/09/20	J		
41.					Buy (add'l)	05/18/20	J		
42. VICTORY TRIVLNT INTL SML CAP Y (MYSIX)	A	Dividend	K	T	Buy (add'l)	02/24/20	J		
43.					Buy (add'l)	03/12/20	J		
44. VIRTUS NWFLT MLTSEC SHTM BD I (PIMSX)	A	Dividend	K	T					
45. Account #2 (H)									
46. ISHARES INC MSCI JAPAN ETF (EWJ)	A	Dividend	J	T					
47. ISHARES JP MORGAN EM BOND ETF (EMB)	A	Dividend	J	T					
48. BLACKROCK EQUITY DIVIDEND I (MADVX)	A	Dividend	J	T					
49. BLACKSTONE ALT MULT-STRAT INST (BXMIX)	A	Dividend	K	T					
50. COLUMBIA SELECT LG CAP GW I (UMLGX)	C	Dividend	J	T					
51. COLUMBIA SELECT LG CAP VAL I (CSVZX)	A	Dividend	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
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52. CONGRESS MID CAP GROWTH INSTL (IMIDX)	A	Dividend	J	T					
53. DIAMOND HILL LONG-SHORT I (DHLSX)	A	Dividend	K	T					
54. HARDING LOEVNER EMERG MKTS ADV (HLEMV)	A	Dividend	K	T					
55. INVESCO GLB REAL ESTATE Y (ARGYX)	A	Dividend	J	T	Buy (add'l)	12/11/20	J		
56. INVESCO OPP STPLTH MLP SEL40 Y (MLPTX)	B	Dividend	J	T					
57. JANUS HENDERSON FLEXIBLE BD I (JFLEX)	A	Dividend	K	T					
58. JANUS HENDERSON INTL MNG VOL I (JMIIX)	A	Dividend	K	T					
59. JANUS HENDERSON INTL OPP I (HFOIX)	A	Dividend	K	T					
60. LOCORR MACRO STRATEGIES I (LFMIX)	A	Dividend	J	T					
61. PGIM HIGH YIELD Z (PHYZX)	A	Dividend	J	T					
62. PGIM JENNISON GROWTH Z (PJFZX)	B	Dividend	K	T					
63. PIMCO LOW DURATION INC I2 (PFTPX)	A	Dividend	K	T					
64. PIMCO SHORT TERM I2 (PTSPX)	A	Dividend	J	T					
65. VICTORY RS PARTNERS Y (RSPYX)	A	Dividend	J	T					
66. VICTORY RS SMALL CAP GROWTH Y (RSYEX)	A	Dividend	J	T					
67. VICTORY RS VALUE Y (RSVYX)	A	Dividend	J	T					
68. VICTORY SOPHUS EMERG MKTS Y (RSENX)	A	Dividend	K	T					

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69. WILLIAM BLAIR INTL GROWTH I (BIGIX)	A	Dividend	K	T					
70. Account #3 (H)									
71. VANGUARD EM MKT SEL STK C (VESCZ) (Y)									
72. CC 529 DFA US LARGE CAP VAL C (DFALZ) (Y)									
73. AL AMER CENT EQ GW C (NAAMC)		None			Merged (with line 76)	04/28/20	J		
74. AL NEUBRGR INTL LGCP C (NUBRR) (Y)									
75. NORTHERN FUNDS INTERNATIONAL EQUITY INDEX (NRIIE) (Y)									
76. UBT 529 AL NRTHRN STK INDEX C (NRISE)		None			Sold	07/16/20	J		
77. Account #4 (H)									
78. CC 529 DFA US LARGE CAP VAL C (DFALZ)		None	J	T					
79. CC TROW QM US SMCP GW EQ C (CTQGZ)(X)		None	J	T					
80. NORTHERN BOND INDEX C 529 (NRBOO)		None	J	T					
81. NORTHERN FUNDS INTERNATIONAL EQUITY INDEX (NRIIE)		None	J	T					
82. NORTHERN MID CAP INDEX C 529 (NRMMM)		None	J	T					
83. T ROWE PRICE BALANCED C (NTROO)		None	J	T					
84. T ROWE PRICE LARGE CAP GROWTH (NRTWW)		None	J	T					
85. Account #5 (H)									

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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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86. DFA REAL EST SEC C (DRSCZ) (Y)									
87. VANGUARD EMERGING MARKETS SEL STK C (VESCZ)		None	J	T					
88. CC 529 DFA US LARGE CAP VAL C (DFALZ)		None	J	T					
89. T ROWE PRICE US SM CAP GROWTH (CTQGZ)		None	J	T					
90. NORTHERN BOND INDEX C 529 (NRBOO)		None	J	T					
91. NORTHERN FUNDS INTERNATIONAL EQUITY INDEX (NRIIE)		None	J	T					
92. NORTHERN MID CAP INDEX C 529 (NRMMM)		None	J	T					
93. PIMCO SHORT TERM C (NRPPM)		None	J	T					
94. T ROWE PRICE BALANCED C (NTROO)		None	J	T					
95. T ROWE PRICE LARGE CAP GROWTH (NRTWW)		None	J	T					
96. Account #6 (H)									
97. ALPHABET INC CL C (GOOG)		None	J	T					
98. AMAZON COM INC (AMZN)		None	J	T					
99. Account #7 (H)									
100. MS PATHWAY ALTERN STRATEGIES (TALTX)	A	Dividend	J	T					
101. MS PATHWAY INTERNATIONAL EQ (TIEUX)	A	Dividend	J	T					
102. MS PATHWAY LARGE CAP EQUITY (TLGUX) (X)	A	Dividend	J	T					

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103. Account #8 (H)									
104. APPLE INC (AAPL)	A	Dividend	J	T					
105. CONSTELLATION BRANDS INC CL A (STZ) (X)	A	Dividend	J	T					
106. MICROSOFT CORP (MSFT)	A	Dividend	J	T					
107. Account #9 (H)									
108. MSPBNA PREFERRED SAVINGS - QC (cash) (Y)									

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

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Oldshue Jr., Jerry C.

Date of Report

05/11/2021

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

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.

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Oldshue Jr., Jerry C.

Date of Report

05/11/2021

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/ Jerry C. Oldshue Jr.

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