

FINANCIAL DISCLOSURE REPORT
FINAL FILING

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) Schoelen, Mary J.	2. Court or Organization U.S. Court of Appeals for Veterans Claims	3. Date of Report 04/16/2020
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Judge - Senior	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 625 Indiana Avenue N.W., Ste 900 Washington, D.C. 20004		
IMPORTANT NOTES: <i>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>		

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.	

Name of Person Reporting	Date of Report
Schoelen, Mary J.	04/16/2020

III. NON-INVESTMENT INCOME. (Reporting individual and spouse; see pp. 17-24 of filing instructions)

A. Filer's Non-Investment Income

[X] 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.)

[X] 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.)

[X] NONE (No reportable reimbursements.)

SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.				
2.				
3.				
4.				
5.				

Name of Person Reporting	Date of Report
Schoelen, Mary J.	04/16/2020

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.		

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Name of Person Reporting

Schoelen, Mary J.

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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. USAA Income Stock Fund (Roth IRA)	A	Int./Div.	J	T					
2. Fidelity Spartan Intl Index Fund (FSPSX) (403(b))	A	Int./Div.	J	T					
3. Fidelity 500 Index Fund (FXAIX) (IRA)	B	Int./Div.	L	T					
4. Vanguard Inst Idx Inst Plus (VHIX) (403(b))	C	Int./Div.	N	T					
5. Vanguard Ttl Intl Stk Idx Ins (VTSNX) (403(b))	B	Int./Div.	K	T					
6. Vang Intl Growth Adm (VWILX) (401(a)) (X)	A	Int./Div.	J	T					
7. Vanguard Inst Idx Inst Plus (VHIX) (401(a))	C	Int./Div.	N	T					
8. Vanguard Ttl Intl Stk Idx Ins (VTSNX) (401(a))	A	Int./Div.	K	T					
9. Vang Intl Growth Adm (VWILX) (401(a)) (X)	A	Int./Div.	J	T					
10. TIAA Traditional Fund	A	Interest	J	T					
11. CREF Equity Index Fund	A	Dividend	K	T					
12. TIAA Real Estate Fund	A	Int./Div.	J	T					
13. Mass Mutual S&P 500 Index Fd(Nrthrn Tr) (403(b))		None	L	T					
14.									
15. FIDELITY BROKERAGE ACCT									
16. iShares EAFE Index exchange traded fund (EFA)	B	Dividend	K	T	Sold (part)	03/11/19	J		
17. S&P 500 Depository Receipt exchange traded fund (SPY)	B	Dividend	L	T	Sold (part)	03/13/19	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	

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)
18. Berkshire Hathaway Inc Class B Common Stock (BRKB)		None	K	T	Sold (part)	03/13/19	J		
19. Fidelity Fidelity 500 Index Fund (FXAIX)	B	Int./Div.	L	T	Sold (part)	03/11/19	J		
20. Fidelity Total Bond Fund (FTBFX)	A	Dividend	J	T	Sold (part)	03/11/19	J		
21.									
22. VANGUARD MUTUAL FUND ACCT									
23. Total Stock Mkt Idx Adm (VTSAX)	B	Dividend	M	T					
24. Total Bond Mkt Index Adm (VBTLX)	A	Dividend	K	T					
25.									
26. MERRILL EDGE BROKERAGE ACCT									
27. T Rowe Price Extended (PEXMX)	A	Dividend			Sold	03/11/19	J		
28. T Rowe Price Total (POMIX)	A	Dividend	J	T	Sold (part)	03/11/19	J		
29.									
30. BANK ACCOUNTS									
31. Bank of America - Checking Acct.		None	K	T					
32. Ally Bank - Savings Account	A	Interest	J	T					
33.									
34. U.S. TREASURY-DIRECT ACCOUNTS									

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

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)
35. Series I Savings Bonds	A	Interest	J	T	Redeemed (part)	03/10/19	J		
36. Series I Savings Bonds	A	Interest	J	T	Redeemed (part)	03/10/19	J		
37.									

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

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

VII, lines 6 & 9: This is a correction from my 2018 filing. On 3/15/2018, the retirement account servicer re-allocated several existing investments into new mutual funds. We had no input into this action. In my 2018 financial disclosure filing, I stated that all the shares of both the Vanguard Developed Markets Index Fund and the TIAA/CREF Intl Equity Index fund were converted by the servicer to the Vanguard Total International Stock Index Fund Institutional (VTSNX). This was incorrect. The TIAA/CREF Intl Equity Index fund shares were converted into the Vang Intl Growth Adm (VWILX) fund. I have corrected that error here.

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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/ **Mary J. Schoelen**

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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