

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) Bloom, Beth F.	2. Court or Organization United States District Court, Southern District of Florida	3. Date of Report 06/09/2021
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) United States District Court Judge, active status	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2020 to 12/31/2020
7. Chambers or Office Address United States District Court, Southern District of Florida Wilkie D. Ferguson, Jr. Courthouse 400 North Miami Avenue, Room 10-2 Miami, FL 33128		
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. Secretary	Children's Craniofacial Association, Miami Children's Hospital
2.	
3.	
4.	
5.	

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. 01/20/1995	State of Florida, Division of Retirement Pension Plan, payable upon retirement
2.	
3.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 12

Name of Person Reporting

Bloom, Beth F.

Date of Report

06/09/2021

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	Distribution from The Koniver Stern Group, Inc.
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.				

FINANCIAL DISCLOSURE REPORT

Page 3 of 12

Name of Person Reporting

Bloom, Beth F.

Date of Report

06/09/2021

V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*NONE *(No reportable gifts.)*

<u>SOURCE</u>	<u>DESCRIPTION</u>	<u>VALUE</u>
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.)*

<u>CREDITOR</u>	<u>DESCRIPTION</u>	<u>VALUE CODE</u>
1. Bank United	Mortgage, Investment Property #2, Miami Beach, Florida (Part VII, Line 1)	N
2. Iberia Bank	Mortgage, Investment Property #4, Miami Beach, Florida (Part VII, Line 2)	M
3. City National Bank	Mortgage, Investment Property #5, Miami Beach, Florida (Part VII, Line 3)	P1
4. City National Bank	Mortgage, Investment Property #6, Miami Beach, Florida (Part VII, Line 7)	N
5. Wells Fargo - Changed from Iberia Bank	Mortgage, Investment Property #8, Miami Beach, Florida (Part VII, Line 8)	M
6. City National Bank	Mortgage, Investment Property #9, Miami Beach, Florida (Part VII, Line 9)	O
7. Mercantile Bank	Mortgage, SRA/Lincoln Theater, LLC (Part VII, Line 10)	P1
8. City National Bank	Mortgage, NDLS Management, LLC (Part VII, Line 12)	O
9. City National	Mortgage, [REDACTED] Partners, LLC (Part VII, Line 14)	L
10. Wells Fargo Bank	Mortgage, Investment Property #10 (Part VII, Line 18)	O
11. Wells Fargo Bank	Mortgage, Investment Property #11 (Part VII, Line 19)	O
12. Wells Fargo Bank	Mortgage, Investment Property #12 (Part VII, Line 20)	O

FINANCIAL DISCLOSURE REPORT

Page 4 of 12

Name of Person Reporting

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Date of Report

06/09/2021

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)
1. Investment Property #2, Miami Beach, FL	A	Rent	O	W					
2. Investment Property #3, Miami Beach, FL	G	Rent	P2	W					
3.	A	Interest							
4. Investment Property #4, Miami Beach, FL	A	Rent	O	W					
5. Investment Property #5, Miami Beach, FL	A	Rent	P2	W					
6.	E	Distribution							
7. Investment Property #6, Miami Beach, FL	A	Rent	O	W					
8. Investment Property #8, Miami Beach, FL	E	Rent	O	W					
9.	E	Distribution							
10. Investment Property #9, Miami Beach, FL	E	Rent	O	W					
11.	D	Distribution							
12. SRA/Lincoln Theater, LLC, Miami Beach, FL	D	Rent	P1	W					
13.	A	Interest							
14.	D	Distribution							
15. NDLS Management, LLC, Palm Beach, FL	A	Rent	O	W					
16. Joe Acquisitions, LLC, Miami, FL	E	Rent	P1	W					
17.	F	Distribution							

1 Income Gain Codes:	A =\$1,000 or less	B =\$1,001 - \$2,500	C =\$2,501 - \$5,000	D =\$5,001 - \$15,000	E =\$15,001 - \$50,000
(See Columns B1 and D4)	F =\$50,001 - \$100,000	G =\$100,001 - \$1,000,000	H1 =\$1,000,001 - \$5,000,000	H2 =More than \$5,000,000	
2 Value Codes	J =\$15,000 or less	K =\$15,001 - \$50,000	L =\$50,001 - \$100,000	M =\$100,001 - \$250,000	
(See Columns C1 and D3)	N =\$250,001 - \$500,000	O =\$500,001 - \$1,000,000	P1 =\$1,000,001 - \$5,000,000	P2 =\$5,000,001 - \$25,000,000	
	P3 =\$25,000,001 - \$50,000,000		P4 =More than \$50,000,000		
3 Value Method Codes	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
(See Column C2)	U =Book Value	V =Other	W =Estimated		

FINANCIAL DISCLOSURE REPORT

Page 5 of 12

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Bloom, Beth F.

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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				
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18. [REDACTED] Partners, LLC, Miami, FL	D	Rent	N	W					
19. The Stern Organization		None	L	W					
20. Joe Partners, LLLP, Miami, FL	E	Rent	P1	W					
21.	D	Interest							
22. Joe Management LLC	D	Interest	L	W					
23.	H1	Distribution							
24. Investment Property #10, Orlando, FL	F	Rent	P1	W					
25. Investment Property #11, Orlando, FL	E	Rent	P1	W					
26. Invetment Property #12, Orlando, FL	E	Rent	P1	W					
27. The Koniver Stern Group, Inc	A	Interest	P1	W					
28. American Funds Europacific Growth Fund	A	Dividend	K	T					
29. Invesco Mid Cap Growth Fund	A	Dividend	L	T					
30. MFS Mass Investors Growth Stock Fund	A	Dividend	M	T					
31. Vanguard Total Stock Market Fund	C	Dividend	M	T					
32. VALIC Fixed Interest Option	B	Interest	L	T					
33. Wells Fargo Adv. Opportunity Fund	A	Dividend	J	T					
34.	A	Distribution							

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	
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FINANCIAL DISCLOSURE REPORT

Page 6 of 12

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Bloom, Beth F.

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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. Citibank, Cash Account		None	K	T					
36. Citibank, Cash Account	A	Interest	L	T					
37. Iberia Bank, Cash Account	A	Interest	M	T					
38. Professional Bank (FKA Marquis Bank), Cash Account	A	Interest	L	T					
39. Professional Bank (FKA Marquis Bank), Cash Account	A	Interest	J	T					
40. Professional Bank (FKA Marquis Bank), Cash Account	A	Interest	L	T					
41. Professional Bank (FKA Marquis Bank), Cash Account	B	Interest	N	T					
42. Professional Bank (FKA Marquis Bank), Cash Account	A	Interest	M	T					
43. Professional Bank (FKA Marquis Bank), Cash Account	A	Interest	J	T					
44. Professional Bank (FKA Marquis Bank), Cash Account	A	Interest	M	T					
45. Professional Bank, Cash Account	A	Interest	L	T					
46. Professional Bank, Cash Account	A	Interest	L	T					
47. Professional Bank, Cash Account	A	Interest	L	T					
48. Professional Bank, Cash Account	B	Interest	N	T					
49. Professional Bank, Cash Account	A	Interest	N	T					
50. Professional Bank, Cash Account	A	Interest	J	T					
51. Wells Fargo Bank, Cash Account	A	Interest	M	T					

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FINANCIAL DISCLOSURE REPORT

Page 7 of 12

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Bloom, Beth F.

Date of Report

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52. Wells Fargo Bank, Cash Account	A	Interest	N	T					
53. Wells Fargo Bank, Cash Account	A	Interest	M	T					
54. Bank United, Cash Account	A	Interest	N	T					
55. Bank United, Cash Account	A	Interest	M	T					
56. Bank United, Cash Account	A	Interest	M	T					
57. Bank United, Cash Account	A	Interest	M	T					
58. Iberia Bank, Cash Account	D	Interest	M	T					
59. Iberia Bank, Cash Account	A	Interest	N	T					
60. Iberia Bank, Cash Account	A	Interest	J	T					
61. Iberia Bank, Cash Account	A	Interest	N	T					
62. Iberia Bank, Cash Account	A	Interest	K	T					
63. Iberia Bank, Cash Account	A	Interest	M	T					
64. Iberia Bank, Cash Account	A	Interest	J	T					
65. Iberia Bank, Cash Account	A	Interest	M	T					
66. Iberia Bank, Cash Account	C	Interest	P1	T	Open	01/01/20	P1		
67. Iberia Bank, Cash Account	D	Interest	P1	T	Open	01/01/20	P1		
68. City National, Cash Account	A	Interest	N	T					

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FINANCIAL DISCLOSURE REPORT

Page 8 of 12

Name of Person Reporting

Bloom, Beth F.

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69. BB&T, Cash Account	A	Interest	M	T					
70. Bank of Ozarks, Cash Account	A	Interest	N	T					
71. Bank of Ozarks, Cash Account	A	Interest	N	T					
72. SEI Institutional Managed Trust DFA US Large Company Portfolio		None			Sold	01/27/20	L	B	
73. SEI Institutional Managed Trust Tax-Managed Large Cap Fund Class F	B	Dividend	M	T					
74.	C	Distribution							
75. SEI Institutional Managed Trust Tax-Managed Small/Mid Cap Fd Class F	A	Dividend	K	T					
76.	A	Distribution							
77. SEI Institutional International Trust International Equity Fd Class F	A	Dividend	L	T					
78. SEI Institutional Managed Trust American Funds - New World Fund		None			Sold	01/27/20	K	A	
79. SEI Institutional International Trust Emerging Mkts Equity Fd Class F	A	Dividend	K	T	Sold (part)	04/08/20	K	A	
80.					Buy (add'l)	08/10/20	K		
81. SEI Tax Exempt Trust Intermediate-Term Municipal Fund Class F	D	Dividend	N	T					
82.	A	Distribution							
83. SEI Institutional Managed Trust High Yield Bond Fund Class F	D	Dividend	K	T					
84. SEI Institutional Managed Trust TWC Emerging Markets Income Fund		None			Sold	01/27/20	L	B	
85. SEI Institutional Managed Trust TIAA-CREF High Yield Fund	A	Dividend			Sold	01/27/20	K	A	

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FINANCIAL DISCLOSURE REPORT

Page 9 of 12

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86. SEI Institutional International Trust Intl Fixed Income Fund Class F	A	Distribution	M	T					
87. SEI Institutional International Trust Emerging Mkts Debt Fd Class F	B	Dividend	L	T	Buy	01/01/20	L		
88. SEI Institutional Managed Trust Multi-Strategy Alt Fund Class F	A	Dividend	M	T					
89.	C	Distribution							
90. SEI Institutional International Trust Nuveen Pref Sec & Inc Fund	A	Dividend			Buy	01/01/20	K		
91.					Sold	08/07/20	K	B	
92. SEI Daily Income Trust Government Fund Class CAA	B	Dividend	N	T					
93. SEI Daily Income Trust Government Fund Class F	A	Dividend	J	T	Buy (add'l)	08/10/20	K		
94.					Buy (add'l)	09/02/20	J		
95. SEI Daily Income Trust Government Fund Class CAA	A	Dividend	M	T					
96. SEI Daily Income Trust Government Fund Class	A	Dividend	J	T					
97. Fidelity Govt. MMKT Capital Researves CL	A	Interest	K	T					
98. CIM COML TR CORP COM	A	Dividend	J	T					
99. Motorola Solutions Inc COM New	A	Dividend	J	T					
100. Investco American Franchise Fund CL A	A	Distribution	K	T					
101. Disney Walt Co COM	A	Dividend	J	T	Buy	01/01/20	J		
102.									

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103.									
104.									

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

Page 11 of 12

Name of Person Reporting

Bloom, Beth F.

Date of Report

06/09/2021

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

FINANCIAL DISCLOSURE REPORT

Page 12 of 12

Name of Person Reporting

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Date 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/ **Beth F. Bloom**

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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