

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2014

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) Halfenger, Gerald M.	2. Court or Organization U.S. Bankruptcy Court, E.D. Wisconsin	3. Date of Report 06/29/2015
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 5b. ☐ Amended Report	6. Reporting Period 01/01/2014 to 12/31/2014
7. Chambers or Office Address U.S. Courthouse & Federal Building Room 140 517 East Wisconsin Avenue Milwaukee, WI 53217		
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. First Vice President & President | Seventh Circuit Bar Association |
| 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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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. 2014	Whitefish Bay School District, wages
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. National Conference of Bankruptcy Judges	10/08/14 - 10/11/14	Chicago, IL	continuing legal education, Conference business meeting	lodging, food
2. State Bar of Wisconsin, Bankruptcy, Insolvency, and Creditors' Rights Section	2/26/14 - 2/28/14	Kohler, WI	continuing legal education sessions, annual section dinner	lodging, food
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.)*SOURCEDESCRIPTIONVALUE

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.)*CREDITORDESCRIPTIONVALUE CODE

1.

2.

3.

4.

5.

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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. Allianz NFJ Large Cap Value	A	Dividend	L	T	Sold (part)	04/08/14	J	A	
2. Blackrock Equity Dividend	A	Dividend	L	T	Sold (part)	04/08/14	J	A	
3. Delaware Select Growth		None	M	T	Sold (part)	04/08/14	J	A	
4. Dodge & Cox Intl Stock	A	Dividend	L	T	Sold (part)	04/08/14	J	A	
5. DWS Managed Municipal Bonds		None			Sold	01/23/14	K	A	
6. Eaton Vance Tax Managed Value		None			Sold	01/23/14	J	A	
7. Franklin Fed Int-Term T/F Inc		None	L	T	Sold (part)	04/08/14	J	A	
8. Fundamental Investors	A	Dividend	L	T	Sold (part)	04/08/14	J	A	
9.					Sold (part)	11/17/14	J	A	
10. Harbor Capital Appreciation	A	Dividend	K	T	Sold (part)	04/08/14	J	A	
11.					Sold (part)	11/17/14	J	A	
12.					Sold (part)	08/18/14	J	A	
13. Hotchkis & Wiley Mid Cap Val	A	Dividend	K	T	Sold (part)	10/24/14	K	A	
14.					Sold (part)	04/08/14	J	A	
15.					Sold (part)	10/24/14	J	A	
16.					Sold (part)	11/17/14	J	A	
17. Invesco International Growth	A	Dividend	L	T	Buy	02/11/14	J		

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		

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☐ 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 I (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.					Buy (add'l)	02/11/14	J		
19.					Sold (part)	04/08/14	J	A	
20.					Buy	02/11/14	J		
21. Invesco Comstock Fd Cl Y	A	Dividend	K	T	Sold (part)	04/08/14	J	A	
22.					Sold (part)	02/11/14	J	A	
23.					Sold (part)	11/17/14	J	A	
24. Manning & Napier World Opp	A	Dividend	J	T	Sold (part)	04/08/14	J	A	
25. MFS Municipal Lim Maturity	A	Dividend	K	T	Sold (part)	04/08/14	J	A	
26. (Franklin)Mutual Global Discovery Cl Z	A	Dividend	L	T	Sold (part)	04/08/14	J	A	
27. Neuberger Berman Mid Cap Gr	A	Dividend	L	T	Sold (part)	04/08/14	J	A	
28. Pioneer Oak Ridge Sm Cap Gr	A	Dividend	K	T	Sold (part)	04/08/14	J	A	
29. T Rowe Price Summit Muni Inc Fd		None	J	T	Buy	01/23/14	K		
30.					Sold (part)	04/08/14	J	A	
31. T Rowe Price Tax-Ex Mon Mkt	A	Int./Div.	K	T					
32. Thornburg Ltd term muni fund		None	K	T	Buy	01/23/14	J		
33.					Buy (add'l)	01/23/14	J		
34.					Sold (part)	04/08/14	J	A	

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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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)

35. American Fund Tax Exempt Bond	A	Int./Div.	K	T	Sold (part)	04/08/14	J	A	
36.					Sold (part)	01/23/14	J	A	
37. Columbia Acorn International	A	Dividend	L	T	Sold (part)	04/08/14	J	A	
38. Eaton Vance Atlanta Cap SMID 1	A	Dividend	K	T	Sold (part)	04/08/14	J	A	
39. Guggenheim Mid Cap Value Fund 1	A	Dividend			Sold (part)	04/08/14	J	A	
40.					Sold	10/24/14	J	A	
41. MFS Growth Fund C1 1	A	Dividend	K	T	Sold (part)	04/08/14	J	A	
42. Primecap Odyssey stock fund	A	Dividend	J	T	Buy	10/24/14	J		
43.					Buy (add'l)	10/24/14	J		
44.					Sold (part)	11/17/14	J	A	
45. American Balanced Fd C1 A-529	A	Dividend	K	T					
46. Capital Income Builder Fd A-529	A	Dividend	L	T					
47. New Perspective Fund C1 A-529	A	Dividend	J	T					
48. Washington Mutual Investment C1 A-529	A	Dividend	J	T					
49. JP Morgan Fed Money	A	Dividend	K	T	Buy (add'l)	11/17/14	K		
50.					Buy (add'l)	08/18/14	J		
51. Alger Small/mid cap growth	A	Dividend	K	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
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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52. Munder Mid Cap Core Growth(Victory Mund Mid Cap core gr y)	A	Dividend	K	T	Sold (part)	11/17/14	J	A	
53. Ranier mid cap equity	A	Dividend	J	T	Sold (part)	11/17/14	J		
54. columbia small cap value ii	A	Dividend	M	T	Sold (part)	10/24/14	J	A	
55.					Sold (part)	10/24/14	J	A	
56.					Sold (part)	11/17/14	J	A	
57. Delaware US growth	A	Dividend	L	T	Sold (part)	11/17/14	J	A	
58. T Rowe Price Instl Lrge Cp Gr	A	Dividend	J	T	Sold (part)	11/17/14	J	A	
59. Dodge & Cox Stock	A	Dividend	M	T	Sold (part)	04/08/14	J	A	
60.					Buy (add'l)	01/23/14	J		
61.					Sold (part)	11/17/14	J	A	
62. MFS Value	A	Dividend	J	T	Sold (part)	11/17/14	J	A	
63. Artisan Intl Value	A	Dividend	L	T					
64. Euro Pacific Growth Fund CI F1	A	Dividend	K	T	Buy (add'l)	11/17/14	J		
65. (Franklin) Mutual Global Discovery CI Z	A	Dividend	L	T					
66. Oppenheimer Intl Growth	A	Dividend	K	T	Buy	11/17/14	J		
67. T. Rowe Price Intl Discovery	A	Dividend	K	T					
68. Dodge & Cox Income	A	Dividend	K	T	Buy (add'l)	08/18/14	J		

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69.					Buy (add'l)	11/17/14	J		
70. JP Morgan Core Bond	A	Dividend	K	T	Buy (add'l)	11/17/14	J		
71. Loomis Sayles Inv Grade Bd	A	Dividend	J	T	Buy (add'l)	11/17/14	J		
72. SmallCap World Fund C1 A	A	Dividend	K	T					
73. Invesco Growth & Income Fund A		None			Sold	02/11/14	K	A	
74. Nike	A	Dividend	K	T					
75. EdVest Wells Fargo Moderate Portfolio	A	Dividend	J	T					
76. Walt Disney	A	Dividend	J	T	Sold (part)	12/22/14	J	A	
77. Putnam Multi-Cap Growth Fund-A		None	J	T					
78. Northwestern Mutual Whole Life Ins.		None	L	T					
79. Oppenheimer Champion Income Fund A	A	Dividend	J	T					
80. PIMCO High Yield Instl	A	Interest	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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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Part VII. Line 53. Munder Mid Cap Core Growth changed its name to Victory Mund Mid Cap Core Growth Y (as of 10/31/14).

Line 80. PIMCO High Yield Instl. This was part of the Foley & Lardner Defined Contribution Retirement Plan that I instructed Schwab in 2013 to liquidate completely to be rolled over into another retirement account. As a result of an interest payment that was not credited until after Schwab issued the rollover check, Schwab liquidated all assets in the plan account other than approximately \$100 of PIMCO High Yield Instl fund, which was worth \$101.55 on December 31, 2014. I overlooked this in filing the annual report and the amended annual report for the year ending December 31, 2013. I have filed an additional amendment to the 2013 report to correct the oversight.

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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/ **Gerald M. Halfenger**

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
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Washington, D.C. 20544