

FINANCIAL DISCLOSURE REPORT INITIAL 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) Colton, Roberta A.	2. Court or Organization U.S. Bankruptcy Court for the Middle District of Florida	3. Date of Report 07/28/2016
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Bankruptcy Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☒ Initial ☐ Annual ☐ Final 5b. ☒ Amended Report	6. Reporting Period 01/01/2015 to 06/30/2016
7. Chambers or Office Address 400 W. Washington St. Rm. 6300 Orlando, Florida 32801		
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. President/Board of Trustees	Hillsborough County Bar Foundation
2. Executive Committee	Trenam Law Firm
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. 03/31/2016	Return of Capital from Former Law Firm - Trenam Law and R.A. Colton -\$41,372 payable over two years.
2. 2015-2016	401(k) Plan with Former Law Firm - \$1.2 million as of 3/31/16 (Details in Investment Section)
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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (yours, not spouse's)
1. 2015	Compensation from former firm - Trenam Law	\$51,250.00
2. 2016	Compensation from former firm - Trenam Law	\$712,221.46
3. 3/31/2016	Return of Capital from former firm - Trenam Law	\$15,000.00
4. 2014	Compensation from former firm - Trenam Law	\$424,216.00

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.	
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.)*

<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.		
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. Bank of America Accounts	A	Interest	N	T					
2. Ally Bank CD	A	Interest	L	T					
3. Northern Trust Account	A	Interest	M	T					
4. Vanguard Retirement Fund 2025	C	Dividend	N	T					
5. Vanguard Admiral Fund	A	Dividend	M	T					
6. Vanguard Ltd. Municipal Fund	A	Dividend	K	T					
7. USB Money Mkt. Account	A	Interest	L	T					
8. Boeing Stock	A	Dividend	K	T					
9. Nextera Energy Stock	A	Dividend	K	T					
10. Eaton Vance Nat'l Municipal IncomeFund	A	Dividend	J	T					
11. IBM Stock	B	Dividend	K	T					
12. Templeton Global Income Fund	A	Dividend	J	T					
13. Walt Disney Stock	A	Dividend	K	T					
14. Comcast Stock		None	J	T					
15. Shwab Money Mkt. Account	A	Interest	O	T					
16.									
17. Vanguard Wellsley Fund - IRA	B	Dividend	M	T					

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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18. Morley Stable Value Fund - Trenam 401(k)		None	L	T					
19. Metro West tltRtn Bond Fund 1- Trenam 401(k)		None	M	T					
20. Am. Fds Bal. R5 Fund - Trenam 401(k)		None	N	T					
21. Amazon Stock		None	L	T					
22. AT&T Stock	A	Dividend	J	T					
23. Avis budget Stock		None	J	T					
24. Charles Schwab Corp. Stock		None	J	T					
25. Comcast Corp.		None	J	T					
26. Express Scripts Stock		None	J	T					
27. Intel Stock		None	J	T					
28. McKesson Stock		None	K	T					
29. Oracle Stock		None	K	T					
30. Pfizer Stock		None	K	T					
31. Time Warner Cable Stock		None	J	T					
32. Time Warner Inc. Stock		None	J	T					
33. Wyndham Workwide Stock		None	J	T					
34. Baron Asset Fund	B	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 \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
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35. Janus Global Research Fund		None	K	T					
36. Schwab Core Equity Fund	B	Dividend	J	T					
37. Touchstone Focused Fund		None	J	T					
38. Eaton Vance Total Rate Advantage Fund		None	J	T					
39. T. Rowe Price Rmt. 2020 Fund- Trenam 401(k)		None	K	T					
40. Vanguard TI Stk Mkt Indx. Adm Fund - Trenam 401(k)		None	N	T					
41. Vanguard Sel. Value Inv. Fund - Treann 401(k)		None	L	T					
42. Am Fds EuroPacific Grth R6 Fd - Trenam 401(k)		None	L	T					
43. Vanguard Variable Annuity- Equity Index	A	Dividend	K	T					
44. Vanguard Variable Annuity - Balanced	A	Dividend	L	T					
45. Vanguard Variable Annuity- Growth	A	Dividend	K	T					
46. Vanguard Variable Annuity-Money Market	A	Dividend	K	T					
47. Vanguard Variable Annuity - Equity Income	A	Dividend	J	T					
48. Fifth Third Bank- HSA	A	Int./Div.	J	T					
49. USB - IRA - MM	A	Int./Div.	J	T					
50.									
51.									

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52.									
53.									
54.									
55.									
56.									
57.									
58.									
59.									

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

I do not have detailed information for retirement funds in the Trenam Law 401(k), other than the identify the fund, its value at the commencement of a quarter and its value at the end of a quarter. I will be terminating my interests in the Trenam Law 401(k) plan shortly and rolling over my retirement funds and, therefore, should have better information in future reports. This is also the situation with the Vanguard Annuity that I purchased.

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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/ **Roberta A. Colton**

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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Washington, D.C. 20544