

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2012

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) Shea-Stonum, Marilyn E.	2. Court or Organization U.S. Bankruptcy Court	3. Date of Report 07/11/2013
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 01/01/2012 to 12/31/2012
7. Chambers or Office Address 2 South Main Street-Rm. 240 Akron, Ohio 44308		
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.	
2. Trustee	██████████ Educational Trust
3. Chair, 2012 National Conference of Bankruptcy Judges' Education Program	National Conference of Bankruptcy Judges
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. 1994	Jones, Day, Reavis & Pogue Retirement Plan (no control)
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.)*

<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. 2012	Case Western Reserve University - salary
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. National Conference of Bankruptcy Judges	1/30 to 2/1	San Diego, CA	Educational	Reimbursement of expenses; site visit for 2012 Education Program Planning Committee
2. National Conference of Bankruptcy Judges	3/18-20	Miami, FL	Educational	Attendance at midyear NCBJ meeting and at NCBJ Endowment Board meeting; reimbursement of expenses
3. Cleveland Metropolitan Bar Association	5/17-18	Cleveland	Educational	Presenter at O'Neill Institute; exp. reimbursement
4. National Conference of Bankruptcy Judges	10/20-27	San Diego, CA	Educational	Expense reimbursement of attendance at 2012 Education Program which I chaired
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.	Trust	Secured loan on investment property in Ladera Ranch, CA	M
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. Cardinal Health Inc	A	Dividend	K	T					
2. Carefusion Corp. (X)		None	J	T					
3. Bernstein US Strategic Value (Sanford Burnstein Equity) Fund		None			Merged (with line 9)	04/30/12	M		401K and Keough Funds--no
4.									
5. American Funds AMCAP Fund A -	D	Int./Div.	L	T					
6. American Funds American Mutual Fund A -	D	Int./Div.	L	T					
7. TIAA CREF - Retirement Plan	E	Int./Div.	P1	T					
8. JDR&P Balanced Fund					Merged (with line 10)	04/30/12	P1		Transfer to other funds
9. Dodge & Cox Stock Fund	C	Int./Div.	M	T					
10. Jones Day Brandywine Fund	G	Int./Div.	O	T					
11. DWS Investment Trust Capital Growth FD CL A	A	Dividend	K	T					
12. Barr Laboratories -IRA		None	J	T					
13. Microchip Technologies	A	Dividend	J	T	Donated (part)				
14. Qualcomm Inc stock	A	Dividend			Donated				United Way
15. Columbia Growth & Income Fund-Z	C	Int./Div.	M	T					
16. Valley Savings	C	Int./Div.	N	T					Huggard Ed. Trust asset
17. First Merit	A	Int./Div.	K	T					Huggard Ed. Trust asset

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

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18. Baron Partners Fund	A	Int./Div.	J	T					
19. Key Bank, N.A.	A	Int./Div.	J	T	depsts				checking account
20. Fidelity Value Fund	A	Int./Div.	K	T	Buy (add'l)	04/30/12	K		
21. Pioneer Value Fund	A	Int./Div.	J	T					
22. Amgen Incorporated	A	Int./Div.	L	T					
23. AIM Energy Fund C1 A	A	Int./Div.	J	T					
24. Alger SMidcap Growth Fd C1 A	A	Int./Div.	J	T					
25. Rental in Orange Co, CA acquired in April 2011 for \$400K	E	Rent	N	R			K		
26. Baron Partners Fund		None	J	T					
27. Blackrock Allcap Global	A	Int./Div.	J	T					
28. Columbia Marsico 21st Century Fund C1 A		None	J	T					
29. Dreyfus S&P Stars Oppty fd C1 A		None	J	T					
30. Fidelity Val Discovery	A	Dividend	J	T					
31. Ishares MSCI AUS Index Fund (X)	A	Int./Div.	K	T			J		
32. Keeley Small Cap Fund C1 A		None	J	T					
33. New York St. Twy Aut Note (X)	A	Interest			Matured	05/10/12	K	A	
34. Pioneer Value Fund C1 A		None	J	T					

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35. T Row Price Latin	A	Dividend	J	T					
36. Wells Fargo Advantage small/mid cap Vlaue Fund	A	Dividend	J	T					
37. fractional interest in oil well operated by Sun Oil Co.	B	Royalty	K	W					
38. Berkshire Hathaway B Fund		None	L	T			L		
39. Schwab Money Market	A	Int./Div.	K	T					

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

[REDACTED]

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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/ Marilyn E. Shea-Stonum**

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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