

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2018

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) Magnus-Stinson, Jane E.	2. Court or Organization US District Court Southern District of Indiana	3. Date of Report 05/09/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Chief District Judge- active	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2018 to 12/31/2018
7. Chambers or Office Address Birch Bayh United States Courthouse 46 E. Ohio St., Room 304 Indianapolis, IN 45204		
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.	Member, Board of Visitors	Indiana University Robert H. McKimney School of Law
2.	Member, Board of Trustees	Butler University
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.	1995	Indiana Judges Retirement Fund, pension upon retirement, eligible for benefits 2020-2023
2.		
3.		

FINANCIAL DISCLOSURE REPORT

Page 2 of 9

Name of Person Reporting

Magnus-Stinson, Jane E.

Date of Report

05/09/2019

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. 2018	Indiana Public Employees Retirement Fund, pension
2. 2018	Indianapolis Airport Authority, wages
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 9

Name of Person Reporting

Magnus-Stinson, Jane E.

Date of Report

05/09/2019

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.		

FINANCIAL DISCLOSURE REPORT

Page 4 of 9

Name of Person Reporting

Magnus-Stinson, Jane E.

Date of Report

05/09/2019

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. Vanguard 500 Index Fund	A	Dividend	J	T					
2. Settlers Life Individual Retirement Annuity	C	Interest	M	T					
3. Indiana Members Credit Union Accts.	A	Int./Div.	K	T					
4. Huntington Bank Acct.	A	Interest	L	T					
5. Old National Bank Acct.	A	Interest	J	T					
6. J IN 529 Age Based Income Portfolio	A	Interest	J	T	Distributed (part)	01/18/18	J	A	
7. G IN 529 Age Based Income Portfolio	A	Interest			Merged (with line 8)	02/09/18	K	A	
8. G IN 529 College Portfolio	A	Interest	K	T	Distributed (part)	03/05/18	J	A	
9.					Distributed (part)	08/29/18	K	A	
10. Charles Schwab Joint Brokerage Account									
11. -CERES California Muni Bond	A	Interest			Matured	08/01/18	K	A	
12. -Indiana Financial Authority Muni Bond	A	Interest	J	T					
13. -Matthews Asia Dividend Fund (MAPIX)	A	Dividend	J	T					
14. -Schwab Bank Cash	A	Interest	K	T					
15. Schwab Brokerage William Stinson									
16. Schwab Bank Cash	A	Interest	J	T					
17. Charles Schwab IRA William Stinson									

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	
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	

FINANCIAL DISCLOSURE REPORT

Page 5 of 9

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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. Schwab Bank Cash	A	Interest	K	T					
19. Loomis Sayles Global Bond (LSGLX)	A	Dividend	J	T					
20. Pioneer Strategic Income (STRYX)	A	Dividend	J	T					
21. Artisan International Fund (ARTIX)		None			Merged (with line 22)	02/15/18	K	A	
22. Artisan International Fund (APDIX)	C	Dividend	K	T					
23. Diamond Hill Small Cap (DHSCX)	A	Dividend	J	T					
24. Dodge & Cox Stock (DODGX)	B	Dividend	K	T					
25. Salient fka Forward International Small Company	B	Dividend	J	T					
26. Harbor Capital Appreciation (HACAX)	C	Dividend	K	T					
27. Matthews Asia Dividend (MAPIX)	A	Dividend	J	T					
28. Neuberger Berman Gensis (NBGNX)	A	Dividend	J	T					
29. Prudential Jennison Mid Cap Growth (PEGZX)		None			Sold	11/30/18	J	B	
30. Scout Unconstrained Bond (SUBEX)	A	Dividend	J	T					
31. Doubleline Total Return (DBLTX)	A	Dividend	J	T					
32. JP Morgan Midcap Value	B	Dividend	J	T					
33. Legg Mason BW Global Bond	A	Dividend	J	T					
34. Charles Schwab IRA - Jane Magnus-Stinson									

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 9

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35. Schwab Bank Cash	A	Interest	K	T					
36. Loomis Sayles Global Bond (LSGLX)	A	Dividend	J	T					
37. Pioneer Strategic Income Institutional (STRYX)	A	Dividend	J	T					
38. Vanguard Short Term Inv (VFSTX)	A	Dividend	J	T					
39. American Funds AMCAP (AMCFX)		None			Merged (with line 40)	02/08/18	K	A	
40. American Funds AMCAP (FMACX)	B	Distribution	K	T					
41. Artisan Intl Fund (ARTIX)		None			Merged (with line 42)	02/15/18	J		
42. Artisan International Fund (APDIX)	B	Dividend	J	T					
43. Diamond Hill Small Cap (DHSCX)	A	Dividend	J	T					
44. Goldman Sachs Mid Cap Value (GSMCX)	A	Dividend	J	T					
45. Harbor International (HAINX)		None			Sold	09/19/18	J	A	
46. Matthews Asia Dividend (MAPIX)	A	Dividend	J	T					
47. NB Genesis (NBGNX)	A	Dividend	J	T					
48. Vanguard Windsor II (VWNFX)	C	Dividend	K	T					
49. Prudential Jennison Mid Cap Growth (PEGZX)		None			Sold	11/30/18	J	B	
50. MFS International New Discovery (MWNIX)	A	Dividend	J	T					
51. Doubleline Total Return (DBLTX)	A	Dividend	J	T					

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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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FINANCIAL DISCLOSURE REPORT

Page 7 of 9

Name of Person Reporting

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52. DFA International Value (DFIVX)	A	Dividend	J	T	Buy	09/19/18	J		
53. Baird Mid Cap (BMDIX)	A	Dividend	J	T	Buy	11/30/18	J		
54. Charles Schwab Brokerage - Jane									
55. Schwab Bank Cash	A	Interest	J	T					
56.									

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FINANCIAL DISCLOSURE REPORT

Page 8 of 9

Name of Person Reporting

Magnus-Stinson, Jane E.

Date of Report

05/09/2019

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

FINANCIAL DISCLOSURE REPORT

Page 9 of 9

Name of Person Reporting

Magnus-Stinson, Jane E.

Date of Report

05/09/2019

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/ Jane E. Magnus-Stinson**

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
One Columbus Circle, N.E.
Washington, D.C. 20544