

**FINANCIAL DISCLOSURE REPORT
FOR CALENDAR YEAR 2013**

*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) Bowdre, Karon O.	2. Court or Organization U.S. District Court, Alabama	3. Date of Report 06/16/2014
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Judge - Active	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final	6. Reporting Period 01/01/2013 to 12/31/2013
	5b. ☐ Amended Report	
7. Chambers or Office Address Hugo Black Courthouse 1729 Fifth Avenue North Birmingham, AL 35203		
IMPORTANT NOTES: <i>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>		

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.	Proprietor	
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. 2001	Samford University (Defined Benefit Plan) - vested benefits in plan of former employer
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. 2013		\$0.00
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. 2013	Self-Employed Law Practice
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.	Byrne Judicial Clerkship Institute	03/13/13-03/15/13	Pepperdine School of Law (Malibu, CA)	Instruct at Judicial Clerkship Seminar	Reimbursement for hotel, travel, & meals
2.	Federal Judicial Conference	04/11/13-04/12/13	Emory University (Atlanta, GA)	Issues in Neuroscience Seminar	Reimbursement for hotel, travel, & meals
3.	Federal Judicial Conference	04/23/13-04/26/13	Washington, DC	Conference for Chief Judges of District Courts	Reimbursement for airfare, hotel, travel, & meals
4.	Federal Judicial Conference	05/01/13-05/04/13	Savannah, GA	Eleventh Judicial Court	Reimbursement for hotel, travel, & meals
5.	Federal Judicial Conference	09/23/13-09/24/13	Washington, DC	Filming Speech on Legal Writing for FJC	Reimbursement for airfare, hotel, & meals

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6.	Florence, Alabama Courthouse	12/12/13	Florence, AL	Meeting with Architect Regarding Renovations to Hugo Black 8th Floor Courtroom	Reimbursement for travel
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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. [REDACTED] Real Estate I Birmingham, Alabama	B	Rent	J	W					
2. First Commercial Bank Acct	A	Interest	J	T					
3. American Fund - Fundamental Investors (See Part VIII)	A	Dividend			Merged (with line 7)	07/01/13	J		
4. American Fund - Capital World Growth & Income	A	Dividend			Sold	07/05/13	J	A	
5. Merrill Lynch Bank Deposit Program (See Part VIII)	A	Dividend	J	T					
6. Perkins Investment Fund - Small Cap Value	A	Dividend			Sold	07/01/13	J		
7. Fundamental Investors (See Part VIII)	A	Dividend	K	T	Buy (add'l)	07/01/13	J		
8.					Sold (part)	07/01/13	J	A	
9. Growth Fund of America	A	Dividend	J	T					
10. Citibank Morgan Stanley Money Fund (See Part VIII)	A	Dividend	K	T					
11. Legg Mason Value Trust	A	Dividend	L	T					
12. Microsoft Common Stock	A	Dividend	K	T					
13. Walmart Common Stock	A	Dividend	L	T					
14. Fundamental Investors Fund (IRA)	A	Dividend	J	T					
15. Growth Fund of America (IRA)	A	Dividend	J	T					
16. New Perspective Fund (IRA)	A	Dividend	J	T					
17. Small Cap World Fund (IRA)	A	Dividend	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
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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18. Cap World Growth & Inc. (IRA)	B	Dividend	K	T					
19. Invest. Co. of America (IRA)	A	Dividend	J	T					
20. Wash. Mutual Inv. Fund (IRA)	A	Dividend	J	T					
21. Trust I; [REDACTED] See Part VIII	D	Int./Div.	O	W					
22. Regions Bank Acct.	A	Interest	M	T					
23. Trust II; [REDACTED] See Part VIII	E	Int./Div.	P1	W					
24. 401(k) - John Hancock; See Part VIII	E	Dividend	O	T	Buy (add'l)	01/02/13	K		
25. Lawfirm Cap. Contrib ([REDACTED]); See Part VIII		None	K	W					
26. Trust III; [REDACTED]; Life Ins.; [REDACTED]; See Part VIII		None	K	W					
27. Trust IV; [REDACTED] Life Ins.; [REDACTED]; See Part VIII		None	K	W					
28. Merrill Lynch Bank Deposit Program	A	Interest	J	T					
29. Merrill Lynch Bank Deposit Program	A	Interest	J	T					
30. Perkins Fd - Small Cap & Value Fund (IRA)	A	Dividend	K	T					
31. T. Rowe Price Mid-Cap Growth Fund (IRA)	A	Dividend	L	T					
32. General Electric Co., Common Stock	A	Dividend	J	T					
33. Metlife (New England Financial) Perm. Life Ins.; See Part VIII	A	Dividend			Merged (with line 95)	05/28/13	K		
34. Metlife (New England Financial) Perm. Life Ins.	A	Dividend	K	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 \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
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35. Metlife Perm Life Insurance; See Part VIII	A	Dividend			Merged (with line 95)	05/28/13	L		
36. T. Rowe Price Mid-Cap Growth Fund	A	Dividend	J	T					
37. Capital World Growth	A	Dividend	K	T					
38. Capital World Growth	A	Dividend	J	T					
39. Intermediate Bond Fund of America	A	Dividend			Sold	07/05/13	J		
40. Real Estate Investment, Joint Venture, Panama City, FL		None	J	W					
41. American Fundamental Investors Class F	A	Dividend	L	T					
42. Fidelity Funds Cash Reserves	A	Dividend	J	T					
43. ING - Life Insurance Policy	A	Dividend	J	T					
44. LLC #4 - [REDACTED] Real Estate Investment; Birmingham, AL	D	Distribution	M	W					
45. New World Fund	A	Dividend	K	T					
46. Royce Special Equity	A	Dividend			Sold	09/03/13	J	A	
47. T. Rowe Price Cap Apprec.	A	Dividend	J	T					
48. American Tax Exempt Bond Fund CL-C	B	Dividend	K	T	Buy (add'l)	10/30/13	J		
49. Cap Inc Bldr FD CLC	A	Dividend	J	T	Buy (add'l)	10/30/13	J		
50. Fundamental Inv. Inc	A	Dividend	J	T					
51. New World Fund	A	Dividend	J	T					

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52. Wells Fargo Co.	A	Dividend	J	T					
53. Income Fund America	A	Dividend	K	T					
54. American Tax Exempt Bond Fund CL-C	A	Dividend	J	T					
55. Cap Inc. Bldr CL C	A	Dividend	J	T					
56. Cap World Growth & Inc.	A	Dividend	J	T					
57. SPDR Gold Trust	A	Dividend			Sold	07/01/13	J	A	
58. SPDR Gold Trust	A	Dividend	K	T					
59. Merrill Lynch Bank Deposit Account	A	Dividend	J	T					
60. TD Bank USA FDIC Ins. Deposit Account	A	Dividend	J	T					
61. American Cent Equity Income Fd	A	Dividend	K	T					
62. American Bond Fund	A	Dividend	K	T					
63. Neuberger Berman Equity	A	Dividend	K	T					
64. American Century Equity Income	A	Dividend	J	T					
65. American Bond Fund of America	A	Dividend	J	T					
66. Neuberger Berman Equity	A	Dividend	J	T					
67. Hussman Strat TR	A	Dividend			Sold	06/28/13	J	A	
68. Managers Fremont Bond	A	Dividend	J	T					

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69. Loomis Sayles Bond Fund	A	Dividend	J	T					
70. Asia Pacific High Div	A	Distribution	J	T					
71. Cushing MLP Total Return	A	Dividend	J	T					
72. Emerging Market Bond	A	Dividend	J	T					
73. First Commercial Bank	A	Interest	K	T					
74. American Washington Mutual Investors	A	Dividend	J	T					
75. Nucor Corporation	A	Dividend	J	T					
76. Permanent Portfolio	A	Dividend			Sold	10/10/13	J	A	
77. Matthew Asia Pacific EQ	A	Dividend	J	T					
78. Principal Diversified Real	A	Dividend			Sold	01/23/13	K	A	
79. American Tax Exempt Bd Fd	A	Dividend			Sold	07/05/13	J		
80. American CNT Interm Bd Fd	A	Dividend			Sold	07/01/13	J	A	
81. American Tax Exempt Bd Fd	A	Dividend	J	T					
82. American High Income Trust Fd	A	Dividend	J	T					
83. Janus High Yield Fund	A	Dividend	J	T					
84. Janus High Yield Fund (See Part VIII)	D	Dividend	M	T					
85. Fidelity Adv Strategic	B	Dividend	K	T					

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86. Janus High Yield Fd	B	Dividend	K	T					
87. Janus High Yield Fd	A	Dividend	J	T					
88. Merrill Lynch Bank Deposit Program (See Part VIII)	A	Interest	J	T					
89. Aberdeen Asia - PAC	A	Dividend			Sold	04/17/13	J	A	
90.			J	T	Buy	06/13/13	J		
91. Proshares Ultra DJ UBS Crude Oil	A	Dividend			Sold	06/17/13	J	A	
92. Gamco Global Gold	A	Dividend			Sold	03/12/13	J	A	
93. DWS RREEF Global	A	Dividend	J	T	Buy	07/01/13	J		
94. DWS RREEF Global	A	Dividend	K	T	Buy	01/23/13	K		
95. Hartford Life Ins. Policy (See Part VIII)	A	Dividend	J	T	Buy	03/13/13	J		
96. Market Vectors ETF Troil	A	Dividend			Buy	01/02/13	J		
97.					Sold	11/25/13	J	A	
98. SPDR Trust Short Term High Yield Bond ETF	A	Dividend	J	T	Buy	03/05/13	J		
99. Market Vectors Gold Miners ETF	A	Dividend			Buy	03/19/13	J		
100.					Sold	09/11/13	J	A	
101. Mairs and Power Growth Fund	A	Dividend	J	T	Buy	09/09/13	J		
102. Oakmark FDS Oakmark International	A	Dividend	J	T	Buy	09/06/13	J		

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103. FPA Crescent Portfolio	A	Dividend	J	T	Buy	10/10/13	J		
104. Managers AMG Yacktman Fund	A	Dividend	J	T	Buy	10/10/13	J		
105. Vanguard Div. Apprec. ETF	A	Dividend	J	T	Buy	12/12/13	J		

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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Name of Person Reporting

Bowdre, Karon O.

Date of Report

06/16/2014

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

Trust I is a trust [REDACTED]

Merrill Lynch manager accounts: Eagle Asset Management SCG, Blackrock Equity Dividend Fund, Neuberger Berman Int'l Core, Neuberger Berman Large Cap Growth, Merrill Lynch Personal Advisor Program and Perkins/Janus MCV.

Sterne Agee & Leach manager accts: Boyd Watterson Fixed Income, Wealth Core-NOESIS, WCM, Lakeshore Capital, W.H. Reaves & Co., Sterne Agee Prime Cash Acct., Minneapolis Port Management and Dana Investments. Investment accts and allocations are selected by Merrill Lynch and Sterne Agee & Leach representatives.

Trust II is a trust [REDACTED]

401(k): (Line 24) John Hancock Pensions: Investments are in Investment Company of America, Income Fund of America, Davis New York Venture, 500 Index Fund, Europacific Growth Fund, American Century Heritage, PIMCO Total Return Fund, and Strategic Income Opp. Fund. Contributions to the Plan and purchases by the Plan to preselected funds are made throughout the year.

Lawfirm Capital Contribution [REDACTED] is in the law firm [REDACTED]

Trust III owns a life insurance policy issued by Phoenix Mutual Life Insurance Company and stock issued by Phoenix Mutual.

Trust IV owns a life insurance policy issued by Northwestern Mutual Life Insurance Company.

Metlife (New England Financial) Perm. Life Insurance: (lines 33 and 35) The net cash values of these policies were applied in an IRC Section 1035 exchange to a new Hartford Life and Annuity Insurance Company Policy. See line 96.

Hartford Life Insurance Policy: (See line 96) The Hartford Life Insurance Policy was acquired through an IRC Section 1035 tax-free exchange, in which policy 8509829 (line 35) and 6536605 (line 33) were surrendered and their cash values transferred to the new policy.

Janus High Yield Fund: Previous lines 92 and 93 were consolidated into one account on line 84 in 2013.

Fundamental Investors: Investment from line 3 merged with investment in line 7 in 2013.

Partial Sales in some holdings did not change year-end category listings.

Deletion of some holdings in previous reported years caused the deletion of certain lines and effectuated a change in number for subsequent entries.

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Name of Person Reporting

Bowdre, Karon O.

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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/ Karon O. Bowdre**

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

2013 Federal Disclosure Report Chart

Line	Asset	Owner	Acct #	Statement	
1	LLC #1- Hwy 280, LLC / Real Estate 1, Birmingham, AL	kob		Hwy 280 LLC / Bodnar LLC Statements	
2	First Commercial Bank Acct	kob	000-107-9960	First Commercial Bank	
3	American Fund-Fundamental Investors; See Part VIII	kob	435-25640	Merrill Lynch / Karon Ed.	Merged with line 7 in '13
4	American Fund-Capital World Growth and Income	kob	435-25640	Merrill Lynch / Karon Ed.	sold '13
5	Merrill Lynch Bank Deposit Program	kob	435-25638	Merrill Lynch / Karon O.	
6	Perkins Investment Fund - Small Cap Value Fund	kob	435-25638	Merrill Lynch / Karon Owen	sold '13
7	Fundamental Investors; See Part VIII	kob	435-25638	Merrill Lynch / Karon Owen	Merged with line 3 in '13
8	Fundamental Investors	kob	435-25638	Merrill Lynch / Karon Owen	partial sale in '13
9	Growth Fund of America	kob	435-25638	Merrill Lynch / Karon Owen	
10	Citibank Morgan Stanley Money Fund	jbb	634-10877-140	Citibank Morgan Stanley	
11	Legg Mason Value Trust	jbb	634-10877-140	Citibank Morgan Stanley	
12	Microsoft Common Stock	jbb	435-24049	Merrill Lynch / jbb Regular Account	
13	Walmart Stores Common Stock	jbb	435-24049	Merrill Lynch / jbb Regular Account	
14	Fundamental Inves.Fund (IRA)	kob	435-25641	Merrill Lynch / kob IRA	
15	Growth Fund of America (IRA)	kob	435-25641	Merrill Lynch / kob IRA	
16	New Perspective Fund (IRA)	kob	435-25641	Merrill Lynch / kob IRA	
17	Small Cap World Fund-IRA	kob	435-25641	Merrill Lynch / kob IRA	
18	Cap.World Growth&Inc-IRA	jbb	435-24014	Merrill Lynch / jbb / IRA	
19	Invest Co of Amer-IRA	jbb	435-24014	Merrill Lynch / jbb / IRA	
20	Wash Mut. Inv Fund-IRA	jbb	435-24014	Merrill Lynch / jbb / IRA	buy add'l '13
21	Trust I; Inc.Benef.; Trustee= Spouse; See Part VIII	jbb		1984 Bowdre Trust fbo JBB	
22	Regions Bank Acct	jbb	03794237	jbb	
23	Trust II; Inc. Bene.; Spouse=Trustee, See Part VIII.	jbb		1998 Bowdre Trust fbo JBB	
24	401(k) John Hancock, See Part VIII.	jbb		John Hancock	
25	Lawfirm Capital Contribution (Spouse), See Part VIII	jbb			
26	Trust III; Inc Benef; Life Ins; Trustee=Spouse,See Part VIII	jbb			
27	Trust IV, Inc Benef; Life Ins; Trustee=Spouse,See Part VIII	jbb			
28	Merrill Lynch Bank Deposit Program	kob	435-25640	Merrill Lynch / Karon O.	
29	Merrill Lynch Bank Deposit Program	jbb	435-24014	Merrill Lynch / JBB / IRA	
30	Perkins Small Cap & Value Fund-IRA	jbb	435-24014	Merrill Lynch / JBB / IRA	
31	T. Rowe Price Mid-Cap Growth Fund-IRA	jbb	435-24014	Merrill Lynch / JBB / IRA	
32	General Eelctric Co, Common Stock	jbb	435-24011	Merrill Lynch/ JBB/ Special Account	
33	Metlife (New England Financial) Permanent Life Insurance	jbb	6536605	GPL Policy	1035 exchange - see line 96
34	Metlife (New England Financial) Permanent Life Insurance	kob	8643774	Permanent Policy	
35	Metlife Permanent Life Insurance	jbb	8509829		1035 exchange - see line 96
36	T. Rowe Price Mid Cap Growth Fund	kob	435-25638	Merrill Lynch / Karon Owen	
37	Capital World Growth	jbb	435-24011	Merrill Lynch / jbb / Special Account	
38	Capital World Growth	jbb	435-24049	Merrill Lynch / jbb Regular Account	
39	Intermediate Bond Fund of America	kob	435-25640	Merrill Lynch / Karon O.	sold '13
40	Real Estate investment joint venture; Panama City, FL	jbb			
41	American Fundamental Investors Class F	jbb	435-24014	Merrill Lynch / jbb / IRA Account	
42	Fidelity Funds Cash Reserves	jbb	2AZ585629	Fidelity	
43	ING - Life Insurance Policy	jbb	RL3070421R	GPUL	
44	LLC #4 - IRIS, LLC; real estate investment; Birmingham, AL	jbb			

45	New World Fund	jbb	435-24014	Merrill Lynch - JBB IRA	
46	Royce Special Equity	jbb	912025582	Strauss	sold '13
47	T. Rowe Price Cap Apprec	jbb	912025582	Strauss	
48	American Tax Exempt Bond Fund CL-C	jbb	435-24011	Merrill Lynch (JBB Special Account)	buy add'l '13
49	Cap Inc Bldr FD CLC	jbb	435-24011	Merrill Lynch (JBB Special Account)	buy add'l '13
50	Fundamental Inv. Inc.	jbb	435-24011	Merrill Lynch (JBB Special Account)	
51	New World Fund, CLC	jbb	435-24011	Merrill Lynch (JBB Special Account)	
52	Wells Fargo Co.	jbb	435-24011	Merrill Lynch (JBB Special Account)	
53	Income Fund America	jbb	435-24049	Merrill Lynch / jbb Regular Account	
54	Amer Tax Exempt Bond Fund CL-C	jbb	435-24013	Merrill Lynch (JBB Land Acct)	
55	Cap Inc Bldr CL-C	jbb	435-24013	Merrill Lynch (JBB Land Acct)	
56	Cap World Growth & Inc.	jbb	435-24013	Merrill Lynch (JBB Land Acct)	
57	SPDR Gold Trust	kob	435-25641	Merrill Lynch (KOB IRA)	sold '13
58	SPDR Gold Trust	jbb	435-24014	Merrill Lynch (JBB IRA)	
59	Merrill Lynch Bank Deposit Program	jbb	435-24011	Merrill Lynch JBB Special Account	
60	TD Bank USA FDIC Ins. Deposit Account	jbb	912025582	Strauss	
61	American Century Equity Income	jbb	435-24014	Merrill Lynch (JBB IRA)	
62	American Bond Fund	jbb	435-24014	Merrill Lynch (JBB IRA)	
63	Neuberger Berman Equity Income Inst	jbb	435-24014	Merrill Lynch (JBB IRA)	
64	American Century Equity Income Inv	kob	435-25641	Merrill Lynch / kob IRA	
65	American Bond Fund	kob	435-25641	Merrill Lynch / kob IRA	
66	Neuberger Berman Equity Income Inst	kob	435-25641	Merrill Lynch / kob IRA	
67	Hussman Strategic Total Return	jbb	912025582	Strauss	sold '13
68	Managers Fremont Bond	jbb	912025582	Strauss	
69	Loomis Sayles Bond Retail	jbb	912025582	Strauss	
70	Asia Pacific High Div	jbb	912025582	Strauss	
71	Cushing MLP Total Return	jbb	912025582	Strauss	
72	Emerging Market Bond	jbb	912025582	Strauss	
73	First Commercial Bank Acct	jbb	000-119-2303		
74	American Washington Mutual Investors	jbb	435-24011	Merrill Lynch / jbb / Special Account	
75	Nucor Corporation	jbb	435-24049	Merrill Lynch/ jbb / Regular Account	
76	Permanent Portfolio	jbb	912-025582	Strauss	sold '13
77	Matthew Asia Pacific EQ	jbb	912-025582	Strauss	
78	Principal Diversified Real Asset Fund	jbb	435-24014	Merrill Lynch (JBB IRA)	sold '13
79	American Tax Exempt Bd Fd	kob	435-25640	Merrill Lynch (KOB Educ)	sold '13
80	American CNT Interm Bd Fd	kob	435-25638	Merrill Lynch (KOB Gen)	sold '13
81	American Tax Exempt Bd Fd	jbb	435-24049	Merrill Lynch (jbb Reg)	
82	American High Income Trust Fd	jbb	435-24049	Merrill Lynch (jbb Reg)	
83	Janus High Yield Fund	kob	435-25641	Merrill Lynch (KOB IRA)	
84	Janus High Yield Fund; See Part VIII	jbb	435-24014	Merrill Lynch (JBB IRA)	previous lines 92 and 93 consolidated in line 84 in '13
85	Fidelity Adv Strategic	jbb	435-24014	Merrill Lynch (JBB IRA)	
86	Janus High Yield Fund	jbb	435-24011	Merrill Lynch (JBB Special Account)	combined with line 87 in '13
87	Janus High Yield Fund	jbb	435-24011	Merrill Lynch (JBB Special Account)	combined with line 88 in '13
88	Merrill Lynch Bank Deposit Program	jbb	435-24013	Merrill Lynch (JBB Land Acct)	
89	Aberdeen Asia-PAC	jbb	912-025582	Strauss	sold '13
90	Aberdeen Asia-PAC	jbb	912-025582	Strauss	buy '13
91	Proshares Ultra DJ UBS Crude Oil	jbb	912-025582	Strauss	sold '13
92	GAMCO Global Gold	jbb	912-025582	Strauss	sold '13

93	DWS RREEF Global Infra	kob	435-25641	Merrill Lynch (KOB IRA)	buy '13
94	DWS RREEF Global Infra	jbb	435-24014	Merrill Lynch (JBB IRA)	buy '13
95	Hartford Life Insurance Policy	jbb	102IU3171548	The Hartford (JBB)	1035 exchange - see lines 33 and 35
96	Market Vectors ETF Troil	jbb	912-025502	Strauss	buy '13
97	Market Vectors ETF Troil	jbb	912-025502	Strauss	sold '13
98	SPDR Trust Short Term High Yield Bond ETF	jbb	912-025502	Strauss	buy '13
99	Market Vectors Gold Miners ETF	jbb	912-025502	Strauss	buy '13
100	Market Vectors Gold Miners ETF	jbb	912-025502	Strauss	sold '13
101	Mairs and Power Growth Fund	jbb	912-025502	Strauss	buy '13
102	Oakmark FDS Oakmark International	jbb	912-025502	Strauss	buy '13
103	FPA Crescent Portfolio	jbb	912-025502	Strauss	buy '13
104	Managers AMG Yackman Fund	jbb	912-025502	Strauss	buy '13
105	Vanguard Div. Apprec. ETF	jbb	912-025502	Strauss	buy '13