

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2016

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) Schoelen, Mary J.	2. Court or Organization U.S. Court of Appeals for Veterans Claims	3. Date of Report 08/10/2017
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Judge - Active	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2016 to 12/31/2016
7. Chambers or Office Address 625 Indiana Avenue N.W., Ste 900 Washington, D.C. 20004		
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.		
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. 2016	Milken Institute - salary
2. 2016	U.S. Department of Homeland Security - Payment for unused leave accrued during employment in 2015
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. U.S. Federal Circuit Bar Association	06/24/2016 - 06/25/2016	Nashville, TN	Speak at annual "Bench & Bar" conference.	Airfare between Washington, DC and Nashville, TN. Ground transportation to/from airports. Hotel room (1 night) and meals in Nashville.
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. USAA Income Stock Fund (Roth IRA)	A	Dividend	J	T					
2. Fidelity Spartan Intl Index Fund (403(b))	A	Dividend	J	T					
3. Fidelity 500 Index Fund Premium Class (IRA)	A	Dividend	K	T					
4. Vanguard Institutional Index Fund (403(b))	C	Dividend	M	T					
5. Vanguard Developed Markets Index Fund (403(b))	B	Dividend	K	T					
6. Vanguard Institutional Index Fund (401(a))	C	Dividend	M	T					
7. Vanguard Developed Markets Index Fund (401(a))	B	Dividend	K	T					
8. TIAA Traditional Fund (403(b))	A	Interest	J	T					
9. CREF Equity Index Fund (403(b))		None	K	T					
10. TIAA/CREF International Equity Index (403(b))	A	Dividend	J	T					
11. TIAA/CREF S&P 500 Index (403(b))	A	Dividend	K	T					
12. TIAA Real Estate Fund (403(b))	A	Interest	J	T					
13. Mass Mutual S&P 500 Index Fd(Nrthrn Tr) (403(b))		None	K	T	Buy	03/31/16	J		
14.									
15. FIDELITY BROKERAGE ACCT									
16. iShares EAFE Index exchange traded fund (EFA)	A	Dividend	K	T					
17. S&P 500 Depository Receipt exchange traded fund (SPY)	B	Dividend	L	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 ~\$250,000,001 - \$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	

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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 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)

18. Berkshire Hathaway Inc Class B Common Stock (BRKB)		None	K	T					
19. Fidelity Spartan 500 Index Mutual Fund (FUSVX)	B	Dividend	L	T					
20. Fidelity Total Bond Fund (FTBFX)	A	Dividend	J	T					
21.									
22. VANGUARD MUTUAL FUND ACCT									
23. Total Stock Mkt Idx Adm (VTSAX)	A	Dividend	L	T	Buy (add'l)	01/12/16	J		
24.					Buy (add'l)	01/26/16	J		
25.					Buy (add'l)	02/09/16	J		
26.					Buy (add'l)	02/23/16	J		
27.					Buy (add'l)	03/08/16	J		
28.					Buy (add'l)	03/22/16	J		
29.					Buy (add'l)	04/05/16	J		
30.					Buy (add'l)	04/19/16	J		
31.					Buy (add'l)	05/03/16	J		
32.					Buy (add'l)	05/17/16	J		
33.					Buy (add'l)	05/31/16	J		
34.					Buy (add'l)	06/14/16	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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35.					Buy (add'l)	06/28/16	J		
36.					Buy (add'l)	07/12/16	J		
37.					Buy (add'l)	07/26/16	J		
38.					Buy (add'l)	08/09/16	J		
39.					Buy (add'l)	08/23/16	J		
40.					Buy (add'l)	09/06/16	J		
41.					Buy (add'l)	09/20/16	J		
42.					Buy (add'l)	10/04/16	J		
43.					Buy (add'l)	10/18/16	J		
44.					Buy (add'l)	11/01/16	J		
45.					Buy (add'l)	11/15/16	J		
46.					Buy (add'l)	11/29/16	J		
47.					Buy (add'l)	12/13/16	J		
48.					Buy (add'l)	12/27/16	J		
49. Total Bond Mkt Index Inv (VBMFX)	A	Dividend	J	T	Buy	08/17/16	J		
50.					Buy (add'l)	09/07/16	J		
51.					Buy (add'l)	10/07/16	J		

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52.					Buy (add'l)	11/07/16	J		
53.					Buy (add'l)	12/07/16	J		
54.									
55. MERRILL EDGE BROKERAGE ACCT									
56. T Rowe Price Extended (PEXMX)	A	Dividend	J	T					
57. T Rowe Price Total (POMIX)	A	Dividend	J	T					
58.									
59. BANK ACCOUNTS									
60. Bank of America - Money Market Savings Acct		None	J	T					
61. Bank of America - Regular Savings Acct	A	Interest	J	T					
62. Bank of America - Platinum Money Market Savings Acct	A	Interest	J	T					
63. Ally Bank - Savings Account	A	Interest	K	T					
64.									
65. U.S. TREASURY-DIRECT ACCOUNTS									
66. Series I Savings Bonds ()	A	Interest	K	T	Buy (add'l)	01/22/16	J		
67. Series I Savings Bonds ()	A	Interest	K	T	Buy (add'l)	01/11/16	J		
68.									

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

Part VII, line 3: In 2016, the "Fidelity Spartan 500 Index Fund" was renamed "Fidelity 500 Index Fund Premium Class."

Part VII, lines 66-67: Both I and my spouse purchased U.S. Savings Bonds (Series I) in 2014. As these bonds are keyed to an individual's Social Security Number, we have divided the bonds into " [REDACTED] " ([REDACTED]) and " [REDACTED] " [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/ **Mary J. Schoelen**

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