

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) Dale, Candy W.	2. Court or Organization District of Idaho	3. Date of Report 05/09/2013
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Magistrate Judge--full-time	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 James A. McClure Federal Building and Courthouse 550 West Fort Street Boise, Idaho 83724		
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. Trustee (Director)	College of Idaho/non-profit liberal arts college
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.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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.)*DATESOURCE AND TYPEINCOME
(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.)*DATESOURCE AND TYPE

1. 2012

Stoel Rives--salary and bonus

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.)*SOURCEDATESLOCATIONPURPOSEITEMS PAID OR PROVIDED

1. _____

2. _____

3. _____

4. _____

5. _____

FINANCIAL DISCLOSURE REPORT

Page 3 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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.	Colby College	Tuition	K
2.	Tufts University School of Medicine	Tuition	K
3.			
4.			
5.			

FINANCIAL DISCLOSURE REPORT

Page 4 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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. Key Bank Accounts	A	Interest	L	T					
2. Bank of America Accounts	A	Interest	J	T					
3. Farmer's New World Life Ins	A	Interest	J	T					
4. New York Life--whole #1	B	Int./Div.	L	T					
5. New York Life--whole #2	A	Int./Div.	K	T					
6. Master Retirement Trust (spouse)		None	N	T					
7. TD Ameritrade IRA Account #1									
8. --DFA Five-Yr Global Portfolio Fund (DFGBX)	B	Interest	L	T					
9.	A	Distribution							
10.	A	Distribution							
11. --Loomis & Sayles Bond Fund (LSBDX)	E	Interest	N	T					
12. --DFA Emerging Market Social Core Equity (DFESX)	A	Dividend	K	T					
13.	A	Distribution							
14. --DFA Internat'l Small Cap Value (DISVX)	A	Dividend	J	T					
15.	A	Distribution							
16. --DFA Internat'l Value (DFIVX)	A	Dividend	J	T					
17. --DFA Large Cap Value (DFLVX)	C	Dividend	M	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	
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 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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)

18. --DFA US Small Cap Equity (DFTSX)	A	Dividend	L	T					
19.	A	Distribution							
20.	B	Distribution							
21. --PIMCO Total Return Bond Fund (PTTRX)	D	Interest	M	T					
22.	B	Distribution							
23.	C	Distribution							
24. --DFA Global Real Estate Fund (DFGEX)	B	Dividend	K	T					
25. --DFA Inflation Protected Securities Fund (DIPSX)	B	Interest	L	T					
26.	A	Distribution							
27.	A	Distribution							
28. --TD Ameritrade Money Market Fund	A	Interest	J	T					
29. TD Ameritrade Taxable Account #1									
30. --DFA Internat'l Core Equity Fund (DFIEX)	C	Dividend	M	T	Buy (add'l)	12/05/12	K		
31. --DFA US Core Equity Fund (DFEOX)	D	Dividend	N	T					
32. --DFA Emerging Markets Core Equity (DFCEX)	B	Dividend	M	T	Buy (add'l)	01/26/12	J		
33.					Buy (add'l)	02/27/12	J		
34.					Buy (add'l)	03/26/12	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	

FINANCIAL DISCLOSURE REPORT

Page 6 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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)
35.					Buy (add'l)	04/26/12	J		
36.					Buy (add'l)	05/29/12	J		
37. --DFA US Large Cap Value (DFLVX)	B	Dividend	M	T					
38. --DFA International Small Cap Equity (DISVX)	A	Dividend			Sold	9/11/12	K	A	
39. --DFA Tax Managed Small Cap Value Equity Fund (DTMVX)	B	Dividend	L	T	Buy (add'l)	01/26/12	J		
40.	B	Distribution			Buy (add'l)	02/27/12	J		
41.	B	Distribution			Buy (add'l)	03/26/12	J		
42.					Buy (add'l)	04/26/12	J		
43.					Buy (add'l)	05/29/12	J		
44. --DFA Tax-Managed Small Cap Equity Fund (DFTSX)	A	Dividend	J	T	Buy	01/24/12	J		
45.					Buy (add'l)	02/27/12	J		
46.					Buy (add'l)	03/26/12	J		
47.					Buy (add'l)	04/26/12	J		
48.					Buy (add'l)	05/29/12	J		
49. --Vanguard Tax-Exempt Short Term Bond Fund (VWSTX)	A	Interest			Sold	06/21/12	K	A	
50. --Vanguard Tax-Exempt Limited Term Bond Fund (VMLTX)	A	Interest			Sold (part)	02/21/12	J	A	
51.					Sold (part)	03/20/12	J	A	

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 H = \$5,001 - \$100,000	D = \$100,001 - \$500,000 I = \$500,001 - \$1,000,000	E = \$1,000,001 - \$5,000,000 J = \$5,000,001 - \$25,000,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P = \$500,001 - \$1,000,000	K = \$15,001 - \$50,000 O = \$50,001 - \$100,000 Q = \$100,001 - \$250,000	L = \$50,001 - \$100,000 P = \$100,001 - \$250,000 R = \$250,001 - \$500,000	M = \$100,001 - \$250,000 S = \$250,001 - \$500,000 T = \$500,001 - \$1,000,000	N = \$1,000,001 - \$5,000,000 U = \$5,000,001 - \$25,000,000 V = \$25,000,001 - \$50,000,000
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 7 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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)
52.					Sold (part)	04/20/12	J	A	
53.					Sold (part)	05/20/12	J	A	
54.					Sold	06/21/12	K	A	
55. --Vanguard Tax-Exempt Int. Term Bond Fund (VWITX)	A	Interest			Buy	01/26/12	K		
56.					Sold	06/21/12	K	A	
57. --EXXON Mobil (XOM)	B	Dividend	L	T					
58. --International Business Machines (IBM)	A	Dividend	K	T					
59. --Union Pacific Corp (UNP)	A	Dividend	K	T					
60. --YUM Brands Inc (YUM)	A	Dividend	J	T					
61. --Delaware Tax Free Idaho Cl A (VIDAX)	B	Dividend	K	T					
62. --Idaho Muni Bond Bk (451152EDO)	B	Interest	L	T					
63. --Ada & Canyon Cnty ID Sch Dist (005176GUO)	A	Interest	K	T					
64. --Canyon Cnty Id Sch (138807HS4)	B	Interest	K	T					
65. --Fremont & Madison Cnty ID (357082EG7)	B	Interest	K	T					
66. --ID Hsg & Fin Assn (45129WGT1)	B	Interest	K	T					
67. --ID Hsg & Fin Assn (45129WGV6)	B	Interest	K	T					
68. --Moscow ID SWR Rev (619481AU8)	B	Interest			Sold	11/1/12	K	A	

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 8 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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)

69. --Moscow ID SWR Rev (619481BV5)	B	Interest	K	T					
70. --Boise State Unive Id Revs (097464TU5)	A	Interest	J	T					
71. --Boise State Univ ID Revs (097464US8)	B	Interest	K	T					
72. --Boise City Urban Renewal AG (09746LBL6)	B	Interest	K	T					
73. --Canyon County ID SCH Dist#131 (138789HU9)	B	Interest	K	T					
74. --Idaho BD BK Auth Rev Bds (451152FX5)	A	Interest	J	T					
75. --Madison County ID Sch Dist No. 32 (556819FD7)	A	Interest	K	T					
76. --Puerto Rico Elec Pwr Auth. (74526QNT5)	A	Interest	K	T					
77. --TD Ameritrade Money Market Fund	A	Interest	K	T					
78. TD Ameritrade Taxable Account #2									
79. --TD Ameritrade Money Market Fund	A	Int./Div.	K	T					
80. --DFA Tax-Advantaged US Core Equity II (DFTCX)	B	Dividend	L	T	Buy (add'l)	01/06/12	J		
81.	A	Distribution			Buy (add'l)	02/06/12	J		
82.					Buy (add'l)	03/06/12	J		
83.					Buy (add'l)	04/09/12	J		
84.					Buy (add'l)	05/07/12	J		
85.					Buy (add'l)	06/06/12	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 \$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 9 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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)

86.					Buy (add'l)	10/05/12	J		
87. --DFA World Ex-US Core Equity (DFTWX)	B	Dividend	K	T	Buy (add'l)	01/06/12	J		
88.	A	Distribution			Buy (add'l)	02/06/12	J		
89.					Buy (add'l)	03/06/12	J		
90.					Buy (add'l)	04/09/12	J		
91.					Buy (add'l)	05/07/12	J		
92.					Buy (add'l)	06/06/12	J		
93.					Buy (add'l)	10/5/12	J		
94. --PIMCO Total Return Bond Fund (PTTRX)	B	Interest	K	T	Buy (add'l)	01/18/12	K		
95.	A	Distribution			Sold (part)	02/03/12	J	A	
96.	A	Distribution			Sold (part)	03/05/12	J	A	
97.					Sold (part)	04/03/12	J	A	
98.					Sold (part)	05/03/12	J	A	
99.					Sold (part)	06/04/12	J	A	
100. --Chipotle Mexican Grill Inc (CMG)		None	J	T					
101. --Glaxosmithkline PLC (GSX)	A	Dividend	J	T					
102. --McDonalds (MCD)	A	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 \$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	

FINANCIAL DISCLOSURE REPORT

Page 10 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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)

103. --Delaware Tax Free ID C1 A (VIDAX)	B	Interest	L	T	Buy (add'l)	10/05/12	J		
104. --Franklin Adjustable US Gov't Fund (FISAX)	A	Dividend	K	T					
105. --Blackrock Intermediate (CIGAX)	A	Dividend			Sold	03/08/12	J	A	
106. --Idaho St. Bldg Authd Aldg Rev (451443QY4)	A	Interest	J	T					
107. --Puerto Rico Elec Pwr Auth Pwr (74526QNT5)	A	Interest	J	T					
108. TD Ameritrade IRA #2									
109. --TD Ameritrade Money Market	A	Interest	J	T					
110. --Wells Fargo Commodity Link CD (949748HR1)		None	K	T					
111. --Duquesne Light Co. Bond (266228CR4)	A	Interest			Sold	04/16/12	K	A	
112. --GE Capital Medium Term Note (36962G3K8)	A	Interest			Sold	10/19/12	K	A	
113. --All State Corp Debenture (020002AC5)	B	Interest	K	T					
114. --Teco Finance Inc	B	Interest	K	T					
115. --DFA International Small Cap (DISVX)	A	Dividend	K	T					
116.	A	Distribution							
117. --DFA Inflation Prot. Sec (DIPSX)	C	Dividend	M	T					
118.	A	Distribution							
119.	A	Distribution							

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	

FINANCIAL DISCLOSURE REPORT

Page 11 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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)
120. --DFA US Targeted Value (DFFVX)	A	Dividend	K	T					
121.	A	Distribution							
122.	B	Distribution							
123. --DFA US Large Cap Value (DFLVX)	A	Dividend	K	T					
124. --DFA International Value (DFIVX)	A	Dividend	J	T					
125. --Loomis and Sayles Bond Fund (LSBDX)	B	Dividend	L	T	Buy	05/22/12	K		
126.					Buy (add'l)	10/24/12	K		
127. --Vanguard Int. Term Invest Grade Bond Fund (VFICX)	A	Dividend	K	T	Buy	01/13/12	K		
128.	A	Distribution							
129.	A	Distribution							
130. Hines Real Estate Account #1									
131. --Hines Real Estate Inv Trust (HINES)	C	Dividend	L	T					
132. Roth IRA Account #1									
133. --DFA Tax-Advantaged Core Equity II Fund (DFTCX)	A	Dividend	J	T	Buy	03/20/12	J		
134.	A	Distribution							
135.									
136.									

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	

FINANCIAL DISCLOSURE REPORT

Page 12 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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)

137.									
138.									
139.									
140.									
141.									
142.									
143.									
144.									
145.									
146.									
147.									
148.									
149.									

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	

FINANCIAL DISCLOSURE REPORT

Page 13 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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

As detailed in last year's report, all positions (which were not closed) from TD Ameritrade CSDN #1, were transfered into TD Ameritrade Taxable Account #2 (Line 78) on 7/22/2011, and therefore are not shown in this year's report.

FINANCIAL DISCLOSURE REPORT

Page 14 of 14

Name of Person Reporting

Dale, Candy W.

Date of Report

05/09/2013

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/ Candy W. Dale**

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