

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) Morgan, Donna S.	2. Court or Organization U. S. District Court, Eastern District of Louisiana	3. Date of Report 05/15/2014
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U. S. District Judge - Active Status	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2013 to 12/31/2013
7. Chambers or Office Address 500 Poydras St., Room C322 New Orleans, LA 70130		
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	Education Committee of the Louisiana Bar Foundation
2. Member of the Board of Directors	New Orleans Chapter of the Federal Bar Association
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. 1997	Wiener Weiss and Madison PC SIMPLE IRA Retirement Plan with former employer
2. 2006	Phelps Dunbar, LLP 401K Plan with former employer
3.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 9

Name of Person Reporting

Morgan, Donna S.

Date of Report

05/15/2014

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. 2013	McGlinchey Stafford PLLC - 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.				
2.				
3.				
4.				
5.				

FINANCIAL DISCLOSURE REPORT

Page 3 of 9

Name of Person Reporting

Morgan, Donna S.

Date of Report

05/15/2014

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.			

FINANCIAL DISCLOSURE REPORT

Page 4 of 9

Name of Person Reporting

Morgan, Donna S.

Date of Report

05/15/2014

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. Neighbors Federal Credit Union	A	Interest	K	T					
2. Iberia Bank checking accounts	A	Interest	K	T					
3. Raymond James Sweep Account	A	Interest			Merged (with line 53)	08/01/13	K		
4. Raymond James Sweep Account	A	Interest			Merged (with line 53)	08/01/13	K		
5. Schwab Value Advantage Money	A	Interest			Merged (with line 53)	08/01/13	N		
6. Fidelity Retirement Mmkt	A	Interest			Merged (with line 53)	08/01/13	N		
7. Franklin Money Fund	A	Interest			Merged (with line 52)	08/01/13	M		
8. Franklin Money Fund	A	Interest			Merged (with line 52)	08/01/13	M		
9. Midland Life Universal Life Policies	A	Interest	K	T					
10. Royal Dutch Shell A Adrf	A	Int./Div.	J	T	Buy	10/28/13	J		
11.					Sold (part)	12/23/13	J	A	
12. Transocean Inc		None	J	T	Buy	09/27/13	J		
13. Apache Corp	A	Int./Div.	J	T	Buy	09/27/13	J		
14. BHP Billiton Adr New	A	Int./Div.	J	T	Buy	10/28/13	J		
15. C H Robinson Worldwide	A	Int./Div.	J	T	Buy	09/27/13	J		
16. Fluor Corporation New	A	Int./Div.	J	T	Buy	10/28/13	J		
17. Deere & Co	A	Int./Div.	J	T	Buy	09/27/13	J		

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 J = \$15,000 or less (See Columns C1 and D3)	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	P4 = More than \$50,000,000 S = Assessment W = Estimated	T = Cash Market

FINANCIAL DISCLOSURE REPORT

Page 5 of 9

Name of Person Reporting

Morgan, Donna S.

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05/15/2014

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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. Dover Corporation	A	Int./Div.	J	T	Buy	11/18/13	J		
19. Johnson Controls Inc	A	Int./Div.	K	T	Buy	10/28/13	K		
20. Kohls Corp	A	Int./Div.	J	T	Buy	11/18/13	J		
21. Bed Bath & Beyond		None	J	T	Buy	12/13/13	J		
22. Molson Coors Brewing Co	A	Int./Div.	J	T	Buy	10/28/13	J		
23. C V S Caremark Corp	A	Int./Div.	J	T	Buy	11/18/13	J		
24. Sysco Corporation	A	Int./Div.	J	T	Buy	09/27/13	J		
25. Becton Dickinson & Co	A	Int./Div.	J	T	Buy	10/28/13	J		
26. Express Scripts Inc		None	J	T	Buy	11/18/13	J		
27. Unitedhealth Group Inc	A	Int./Div.	J	T	Buy	12/13/13	J		
28. Teva Pharm Inds Ltd Adrf	A	Int./Div.	J	T	Buy	09/27/13	J		
29. Bank of New York Mellon C	A	Int./Div.	J	T	Buy	09/27/13	J		
30. Wells Fargo & Co New	A	Int./Div.	J	T	Buy	10/28/13	J		
31. A F L A C Inc	A	Int./Div.	J	T	Buy	11/18/13	J		
32. H C P Inc	A	Int./Div.	J	T	Buy	12/13/13	J		
33. Cisco Systems Inc	A	Int./Div.	J	T	Buy	11/18/13	J		
34. Visa Inc Class A	A	Int./Div.	J	T	Buy	09/27/13	J		

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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	
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 9

Name of Person Reporting

Morgan, Donna S.

Date of Report

05/15/2014

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35. Western Union Company	A	Int./Div.	J	T	Buy	11/18/13	J		
36. Cognizant Tech Sol C1 A		None	J	T	Buy	12/13/13	J		
37. Oracle Corporation	A	Int./Div.	J	T	Buy	10/28/13	J		
38. A T & T New	A	Int./Div.	J	T	Buy	10/28/13	J		
39. Entergy Corp New	A	Int./Div.	J	T	Buy	09/27/13	J		
40. Exelon Corporation	A	Int./Div.	J	T	Buy	11/18/13	J		
41. Bank of India CD	A	Int./Div.	K	T	Buy	12/20/13	K		
42. Amer Exp Cent Bk	A	Int./Div.	K	T	Buy	09/27/13	K		
43. Ally Bk Gmac	A	Int./Div.	J	T	Buy	09/27/13	J		
44. Ally Bank CD	A	Int./Div.	K	T	Buy	12/19/13	K		
45. Salle Mae Bank CD	A	Int./Div.	K	T	Buy	10/31/13	K		
46. Bank of Baroda CD	A	Int./Div.	J	T	Buy	12/19/13	J		
47. Discover Bank CD	A	Int./Div.	K	T	Buy	12/19/13	K		
48. BMW Bank North America C	A	Int./Div.	K	T	Buy	11/26/13	K		
49. GE Cap Bk Instl CD	A	Int./Div.	J	T	Buy	10/31/13	J		
50. GE Cap Retail Bank	A	Int./Div.	J	T	Buy	11/26/13	J		
51. CIT Bank CD	A	Int./Div.	J	T	Buy	11/26/13	J		

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FINANCIAL DISCLOSURE REPORT

Page 7 of 9

Name of Person Reporting

Morgan, Donna S.

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52. Schwab Govt Money Fund	A	Interest	M	T					
53. Schwab Money Market Fund	A	Interest	M	T					

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FINANCIAL DISCLOSURE REPORT

Page 8 of 9

Name of Person Reporting

Morgan, Donna S.

Date of Report

05/15/2014

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

FINANCIAL DISCLOSURE REPORT

Page 9 of 9

Name of Person Reporting

Morgan, Donna S.

Date of Report

05/15/2014

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/ **Donna S. Morgan**

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