

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2017

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) Burkhardt, Jill L.	2. Court or Organization United States District Court, Southern District of Californi	3. Date of Report 05/16/2018
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) full-time Magistrate Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2017 to 12/31/2017
7. Chambers or Office Address 221 W. Broadway, Suite 5140 San Diego, CA 92101		
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. Trustee	Trust #1
2. Board Member	Association of Business Trial Lawyers
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.	
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. 2017	Artful Chefs, independant contractor salary
2. 2017	Inside Bill's Kitchen, self-employed (personal chef)
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. Duke Law School	09/06/2017 to 09/08/2017	Washington DC	TAR Conference	Transportation, lodging, food, conference fees
2. Association of Business Trial Lawyers	10/05/2017 to 10/08/2017	Carlsbad, CA	ABTL Annual Seminar	Transportation, lodging, food, seminar fees
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.)*SOURCEDESCRIPTIONVALUE

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.)*CREDITORDESCRIPTIONVALUE CODE

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. Trust # 1 (H)									
2. - Rental Property, San Diego, CA	D	Rent	N	W					
3. Cabrillo Federal Credit Union account	A	Interest	L	T					
4. California Coast Credit Union account	A	Interest	J	T	Open	01/05/17	J		
5. Charles Schwab checking account		None	J	T					
6. Coastal Life Wealth - Roth #1 (H)									
7. - Coastal Life Wealth QPRMQ	A	Interest	J	T					
8. - iShares core S&P 500 Index ETF (IVV) (exchange traded fund)	A	Dividend	K	T					
9. Coastal Life Wealth - Roth #2 (H)									
10. - Coastal Life Wealth QPRMQ	A	Interest	J	T					
11. -F (common stock)	A	Dividend			Sold	12/13/17	J	C	
12. -MGM (common stock)	A	Dividend	J	T					
13. -TGT (common stock)	A	Dividend			Sold	12/13/17	J	C	
14. -AAL (common stock)	A	Dividend	J	T					
15. Coastal Life Wealth - IRA #1 (H)									
16. -Coastal Life Wealth QPRMQ	A	Interest	J	T					
17. -BA (common stock)	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 = \$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 \$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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☐ 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 I (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. -CSCO (common stock)	A	Dividend	J	T					
19. -CVX (common stock)	B	Dividend	K	T					
20. -KMI (common stock)	A	Dividend			Sold	12/07/17	J	D	
21. -QCOM (common stock)	A	Dividend			Sold	11/10/17	J	D	
22. -T (common stock)	A	Dividend	J	T					
23. -TGT (common stock)	A	Dividend			Sold	12/08/17	K	E	
24. -Ishares Core S&P 500 ETF (exchange traded fund)	A	Dividend	K	T					
25. -Industrial Property Trust (private investment)	B	Dividend	K	T					
26. -JNJ (common stock)	A	Dividend	J	T	Buy	12/15/17	J		
27. -JPM (common stock)	A	Dividend	J	T	Buy	12/15/17	J		
28. Coastal Life Wealth - IRA #2 (H)									
29. -Coastal Life Wealth QPRMQ	A	Interest	J	T					
30. -BRKB (common stock)	A	Dividend	M	T					
31. -NVS (common stock)	A	Dividend			Sold	04/24/17	J	A	
32. -UPS (common stock)	A	Dividend			Sold	04/24/17	J	A	
33. -Ivy Asset Strategy - WASCX (mutual fund)	A	Dividend			Sold	04/24/17	L	A	
34. -JP Morgan Equity Income - OINCX (mutual fund)	A	Dividend			Sold	04/24/17	M	E	

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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. -MFS International Diversification - MDIGX (mutual fund)	A	Dividend			Sold	04/24/17	L	C	
36. -American Funds EuroPacific Growth Fund - AEPFX (mutual fund)	A	Dividend	K	T	Buy	10/01/17	K		
37. -BlackRock Floating Rate Income Fund - BFRIX (mutual fund)	A	Dividend	J	T	Buy	05/04/17	J		
38. -BlackRock High-Yield Bond Portfolio - BHYIX (mutual fund)	A	Dividend	J	T	Buy	05/17/17	J		
39. -Edgewood Growth Fund - EGFIX (mutual fund)	A	Dividend	K	T	Buy	05/01/17	K		
40.			J		Buy (add'l)	05/17/17	J		
41.					Sold (part)	05/19/17	J	A	
42. -Harding Loevner Institutional Emerging HLMEX (mutual fund)	A	Dividend	J	T	Buy	05/04/17	J		
43. -iShares Russell 2000 Growth ETF - IWO (exchange traded fund)	A	Dividend	J	T	Buy	05/03/17	J		
44. -iShares Russell 2000 Value ETF - IWN (exchange traded fund)	A	Dividend	J	T	Buy	05/03/17	J		
45. -Templeton Global Bond Fund - TGBAX (mutual fund)	A	Dividend	J	T	Buy	05/04/17	J		
46. -Prudential Short-Term Corporate Bond - PIFZX (mutual fund)	A	Dividend	K	T	Buy	05/01/17	K		
47. -PIMCO Income Fund - PONAX (mutual fund)	A	Dividend	J	T	Buy	05/04/17	J		
48. -Vanguard Mid-Cap Index Fund ETF - VO (exchange traded fund)	A	Dividend	K	T	Buy	05/03/17	J		
49. -Legg Mason Clearbridge Appreciation - SAPYX (mutual fund)	A	Dividend	K	T	Buy	05/01/17	K		
50. -Prudential Total Return Bond Fund - PDBZX (mutual fund)	B	Dividend	K	T	Buy	05/17/17	K		
51. Victory Trivalent International Small-Cap - MISIX (mutual fund)	A	Dividend	J	T	Buy	05/01/17	J		

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52. Tweedy, Browne Global Value Fund - TBGVX (mutual fund)	A	Dividend	K	T	Buy	05/01/17	K		
53. Other #1 (H)									
54. -Coastal Life Wealth QPRMQ	A	Interest	J	T					
55. -Fidelity Advisor Strategic Income A (FSTAX) (mutual fund)	A	Dividend	K	T					
56. -Invesco Intermediate Term Municipal Income (VKLMX) (mutual fund)	A	Dividend	K	T					
57. -iShares Select Dividend ETF (DVY) (exchange traded fund)	A	Dividend	K	T					
58. Other #2 (H)									
59. - Coastal Life Wealth QPRMQ	A	Interest	J	T					
60. -WDC (common stock)	A	Dividend	J	T					
61. -Chula Vista bond	A	Interest	K	T					
62. -Franklin Cal Intern - FCCIX (mutual fund)	B	Dividend	L	T					
63. Coastal Life Wealth IRA #5 (H)									
64. -Coastl Life Wealth QPRMQ	A	Interest	J	T					
65. -Ishares Select Dividend ETF (DVY) (exchange traded fund)	B	Dividend	L	T					

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

Section VII, line 25 - The Industrial Property Trust is a private investment; it doesn't trade on a stock exchange. It does not have a symbol, but it has a cusip number of 4562A207

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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/ Jill L. Burkhardt**

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