

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) Lynch, Sandra L.	2. Court or Organization U.S. Court of Appeals, 1st Cir	3. Date of Report 12/15/2017
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Circuit 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 United States Courthouse 1 Courthouse Way, Suite 8710 Boston, MA 02210		
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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (yours, not spouse's)
1. 10/12/16	New York University School of Law teaching stipend	\$2,000.00
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. 2016	Posternak, Blankstein, & Lund, LLP (W-2)
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. New York University School of Law	10/12/16 - 10/14/16	New York City	Teaching	Travel, lodging, and meals
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.)*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. Fidelity Mass Muni MM	A	Dividend	L	T					
2. Bank of America	A	Interest	K	T					
3. ROLLOVER IRA (H)									
4. - Fidelity Disciplined Equity	C	Dividend	M	T					
5. - Fidelity Cash Reserves (Y)									
6. - Fidelity Government Cash Reserves	A	Interest	J	T					
7. Fidelity Investments Core Cash	A	Interest	K	T					
8. TRADITIONAL IRA (H)									
9. - Fidelity Low Priced Stock	C	Dividend	L	T	Sold (part)	02/18/16	J	C	
10.					Sold (part)	03/16/16	J	C	
11. - Fidelity Capital and Income	A	Dividend	K	T					
12. - Fidelity Invest Grade	C	Dividend	M	T	Sold (part)	01/12/16	J	A	
13.					Sold (part)	02/18/16	J	A	
14.					Buy (add'l)	03/16/16	J		
15.					Buy (add'l)	10/06/16	J		
16.					Buy (add'l)	11/04/16	J		
17. - Fidelity Blue Chip Growth	B	Dividend	K	T	Sold (part)	02/18/16	J	C	

1. Income Gain Codes:	A ~\$1,000 or less	B ~\$1,001 - \$2,500	C ~\$2,501 - \$5,000	D ~\$5,001 - \$15,000	E ~\$15,001 - \$50,000
(See Columns B1 and D4)	F ~\$50,001 - \$100,000	G ~\$100,001 - \$1,000,000	H1 ~\$1,000,001 - \$5,000,000	H2 ~More than \$5,000,000	
2. Value Codes	J ~\$15,000 or less	K ~\$15,001 - \$50,000	L ~\$50,001 - \$100,000	M ~\$100,001 - \$250,000	
(See Columns C1 and D3)	N ~\$250,001 - \$500,000	O ~\$500,001 - \$1,000,000	P1 ~\$1,000,001 - \$5,000,000	P2 ~\$5,000,001 - \$25,000,000	
	P3 ~\$25,000,001 - \$50,000,000		P4 ~More than \$50,000,000		
3. Value Method Codes	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
(See Column C2)	U = Book Value	V = Other	W = Estimated		

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18.					Sold (part)	09/08/16	J	B	
19. - Fidelity Advisor Strategic Inc CL I	A	Dividend	J	T	Sold (part)	07/26/16	J	A	
20.					Sold (part)	10/06/16	J		
21. - Fidelity Total Bond	D	Dividend	M	T	Sold (part)	01/12/16	J	B	
22.					Sold (part)	02/18/16	J	C	
23.					Buy (add'l)	03/16/16	J		
24.					Buy (add'l)	07/26/16	J		
25.					Buy (add'l)	10/06/16	J		
26.					Buy (add'l)	12/07/16	J		
27. - Fidelity Growth Company	C	Dividend	L	T	Sold (part)	03/16/16	J	C	
28. - Fidelity Advisor High Income CL I	A	Dividend	J	T	Sold (part)	11/04/16	J	C	
29. - Fidelity Short Term Bond	A	Dividend	K	T	Sold (part)	02/18/16	J	A	
30.					Buy (add'l)	07/26/16	J		
31.					Sold (part)	11/04/16	J	A	
32. - Strategic ADV Int'l II FD (formerly Strategic ADV US Oppty II)	C	Dividend	M	T	Buy (add'l)	01/12/16	J		
33.					Sold (part)	02/18/16	K	D	
34.					Sold (part)	03/16/16	J	B	

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 = \$5,000,001 - \$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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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.					Sold (part)	05/11/16	J	B	
36.					Sold (part)	09/08/16	J	B	
37.					Sold (part)	12/07/16	J	B	
38. -Fidelity Equity Income	B	Dividend	K	T	Sold (part)	12/07/16	J		
39. -Fidelity Value		None			Sold	07/26/16	K	C	
40. -Fidelity Emerging Markets	A	Dividend	K	T	Buy (add'l)	01/12/16	J		
41.					Sold (part)	02/18/16	K		
42. -Fidelity Stock Selector All Cap Fd	B	Dividend	M	T	Sold (part)	02/18/16	J	B	
43.					Sold (part)	03/16/16	J		
44.					Sold (part)	05/11/16	J		
45.					Sold (part)	07/26/16	J		
46.					Sold (part)	12/07/16	J		
47. -Fidelity Focused High Income Fund	A	Dividend	K	T					
48. -FIMM MMKT Port Inst Cl		None			Sold	02/18/16	J		
49. -Fidelity Stock Selector Small Cap	A	Dividend	K	T	Sold (part)	02/18/16	J	A	
50. -Fidelity Mega Cap Stock Fd	B	Dividend	L	T	Sold (part)	07/26/16	J	B	
51.					Sold (part)	12/07/16	J	B	

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52. -Fidelity Real Estate Income	B	Dividend	K	T					
53. -Fidelity Municipal Income	A	Dividend			Sold	03/16/16	K	B	
54. -Fidelity Floating Rate High Income	A	Dividend	K	T					
55. -Fid Advisor Stock Selectr Mid Cap CL I	A	Dividend	K	T	Sold (part)	03/16/16	J	A	
56. -Fidelity Conservativ Income Bond FD CL I	A	Dividend	K	T	Sold (part)	11/04/16	J		
57. -Fid Large Cap Value Enhanced Index	B	Dividend	L	T	Sold (part)	07/26/16	J	A	
58. -Fidelity Contrafund	B	Dividend	K	T	Sold (part)	05/11/16	J		
59. -Fidelity Value Discovery	A	Dividend	K	T	Buy (add'l)	02/18/16	J		
60. -Fidelity SAI U.S. Large CAP Index	A	Dividend	K	T	Buy	07/26/16	J		
61.					Buy (add'l)	07/27/16	J		
62.					Buy (add'l)	09/08/16	J		
63.					Buy (add'l)	10/06/16	J		
64. -Fidelity SAI International Index	A	Dividend	K	T	Buy	02/18/16	J		
65. -Fidelity SAI Emerg Markets Index	A	Dividend	K	T	Buy	02/18/16	J		
66.					Buy (add'l)	07/26/16	J		
67.					Buy (add'l)	11/04/16	J		
68.					Buy (add'l)	12/07/16	J		

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69. -Fidelity SAI U.S. Quality Index Fund	A	Dividend	L	T	Buy	02/18/16	K		
70.					Buy (add'l)	02/19/16	J		
71.					Buy (add'l)	03/16/16	J		
72.					Buy (add'l)	07/26/16	J		
73. -Fidelity Small Cap Value	A	Dividend	K	T	Buy	12/07/16	J		
74. -Fidelity Select Natural Resources	A	Dividend	K	T	Buy	03/16/16	J		
75.					Buy (add'l)	05/11/16	J		
76.					Buy (add'l)	11/04/16	J		
77. -Fidelity Inflation Protected Bond	A	Dividend			Buy	03/16/16	J		
78.					Buy (add'l)	03/17/16	J		
79.					Buy (add'l)	05/11/16	J		
80.					Sold	12/07/16	J	A	
81. -Fidelity Inflat-port BD Index Instl Perm	A	Dividend	J	T	Buy	12/07/16	J		
82.					Buy (add'l)	12/08/16	J		
83. -FIMM Government Portfolio: Instl CL	A	Dividend	J	T	Buy	02/18/16	J		
84.					Sold (part)	02/23/16	J		
85.					Sold (part)	05/24/16	J		

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86.					Buy (add'l)	07/26/16	J		
87.					Sold (part)	08/16/16	J		
88.					Sold (part)	12/28/16	J		
89. Esplanade Capital Ptnrs I LLC (See note section VIII)		None	N	U					
90. PAS BROKERAGE ACCOUNT(H)									
91. -Fidelity Municipal Income	A	Dividend	K	T					
92. -Fidelity Limited Term Muni Income	A	Dividend	J	T					
93. -Fidelity Municipal Money Market (Y)									
94. -Deutsch Strategic High Yld Tax S	A	Dividend	K	T					
95. -Deutsche Managed Muni Bond FD S	A	Dividend	J	T					
96. -Fidelity Advisor Int'l Discovery CL I	A	Dividend	J	T	Sold (part)	03/14/16	J		
97. -Fidelity Real Estate Investment	A	Dividend	J	T	Sold (part)	12/20/16	J	A	
98. -Fidelity Capital & Income	A	Dividend	J	T					
99. -Champlain Small Co. Fund Adv CL Conf	A	Dividend	J	T					
100. -Allianz NFJ Small Cap Val Admin Class	A	Dividend	J	T					
101. -Artisan Intl Value Fund Inv CL	A	Dividend	J	T	Buy (add'l)	01/17/16	J		
102. -Baron Growth	A	Dividend	J	T					

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103. -William Blair Int'l Growth Class N	A	Dividend	J	T	Buy (add'l)	03/14/16	J		
104.					Sold (part)	05/17/16	J		
105.					Sold (part)	09/30/16	J	A	
106.					Buy (add'l)	12/20/16	J		
107. -JPMorgan Mid-Cap Value Fn Select CL	A	Dividend	J	T					
108. -Hartford Growth Opportunity Class A	B	Dividend	J	T					
109. -Hotchkiss & Wiley Mid Cap Value CL A	A	Dividend	J	T					
110. -Mainstay Lg Cap Grwth Fund Class A	A	Dividend	J	T					
111. -T Rowe Price Equity Income Advisor CL	A	Dividend	J	T					
112. -Templeton Global Bond Class A	A	Dividend	J	T	Sold (part)	01/07/16	J		
113.					Sold (part)	03/14/16	J	A	
114.					Buy (add'l)	05/17/16	J		
115.					Buy (add'l)	12/20/16	J		
116. -Fidelity Mass Muni Income	B	Dividend	K	T	Sold (part)	01/07/16	J	A	
117.					Buy (add'l)	05/17/16	J		
118.					Buy (add'l)	07/22/16	J		
119.					Buy (add'l)	09/30/16	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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Lynch, Sandra L.

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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 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)
120.					Sold (part)	12/20/16	J		
121. -Allianceber Muni Inc II Mass Cl A (Also called AB Muni Income)	A	Dividend	J	T					
122. -JPMorgan US Equity FD Sel Cl	A	Dividend	J	T	Sold (part)	07/22/16	J	A	
123. -MFS Int'l Diversification Fd A	A	Dividend	J	T					
124. -Causeway Int'l Value Investor	A	Dividend	J	T					
125. -MFS Int'l Val Fd Cl A	A	Dividend	J	T					
126. -MFS Muni Mass Cl A	A	Dividend	J	T	Buy (add'l)	12/20/16	J		
127. -MFS Research Int'l Cl A	A	Dividend	J	T	Sold (part)	09/30/16	J	A	
128. -Primecap Odyssey Growth	A	Dividend	J	T					
129. -T. Rowe Price Tax Free Inc Adv	A	Dividend	J	T	Sold (part)	03/14/16	J	A	
130. -T. Rowe Price Tax Free Short Inter	A	Dividend	J	T	Sold (part)	10/26/16	J	A	
131. -SPDR S&P 500 ETF	A	Dividend	K	T					
132. -iShares Russell 1000 Value ETF (name change)	A	Dividend	K	T	Sold (part)	05/19/16	J	A	
133.					Sold (part)	12/22/16	J	A	
134. -iShares Russell 1000 Growth ETF (name change)	A	Dividend	K	T	Buy (add'l)	03/16/16	J		
135.					Sold (part)	05/19/16	J	A	
136. -Franklin Internatl Sm Cap Grwth Advisor		None			Sold (part)	03/14/16	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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Lynch, Sandra L.

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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)
137.					Sold	10/26/16	J		
138. -Sector Spdr Tr Shs Ben Int Financial	B	Dividend	J	T	Sold (part)	05/19/16	J	A	
139.					Sold (part)	07/26/16	J	A	
140. -SPDR Ser Tr Barclays Conv Secs ETF	A	Dividend			Sold	03/16/16	J		
141. -T Rowe Intl Stock Advisor	A	Dividend			Buy (add'l)	01/07/16	J		
142.					Buy (add'l)	03/14/16	J		
143.					Closed	10/18/16	J		
144. -Transamerica Intl Equity CL I	A	Dividend	J	T	Sold (part)	01/07/16	J	A	
145.					Buy (add'l)	03/14/16	J		
146.					Sold (part)	07/22/16	J		
147. -Ishares Core S&P Small-cap ETF	A	Dividend	J	T	Sold (part)	07/26/16	J	A	
148. -Fidelity Emerging Markets	A	Dividend	J	T	Buy (add'l)	01/07/16	J		
149. -Acadian emerging Markets Port Instl	A	Dividend	J	T	Buy (add'l)	05/17/16	J		
150. -Invesco Convertible Securities FD CL Y		None			Sold	03/14/16	J		
151. -Janus Enterprise Fund Class	A	Dividend	J	T	Buy (add'l)	01/07/16	J		
152.					Buy (add'l)	03/14/16	J		
153.					Sold (part)	09/30/16	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 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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Lynch, Sandra L.

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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)
154. -T Rowe Price Emerging Mkts Stock	A	Dividend			Buy (add'l)	05/17/16	J		
155.					Closed	10/27/16	J		
156. -Templeton Frontier Mrtks FD ADV CL	A	Dividend			Sold (part)	01/19/16	J		
157.					Sold (part)	01/25/16	J		
158.					Sold	01/27/16	J		
159. -Transamerica Interntl Small Cap Value I	A	Dividend			Sold	05/17/16	J	A	
160. -Eaton Vance Income Fund Of Boston CL I	A	Dividend			Closed	10/18/16	J		
161. -Oppenheimer Interntl Bond	A	Dividend			Buy (add'l)	01/07/16	J		
162.					Sold	12/20/16	J	A	
163. -Ishares Russell Midcap Growth		None			Sold	03/16/16	J		
164. -Ishares Russell 1000 ETF	A	Dividend	J	T	Sold (part)	10/04/16	J	A	
165. -Ishares S&P Small Cap Growth ETF Cross Trade	A	Dividend	J	T					
166. -Vanguard Index Fds Vanguard Value	A	Dividend	J	T	Sold (part)	10/04/16	J	A	
167.					Sold (part)	12/22/16	J	A	
168. -Causeway Emerging MRKTS FD Inv CL	A	Dividend	J	T	Buy	05/17/16	J		
169. -Franklin Convertible Securities Advisor	A	Dividend	J	T	Buy	01/07/16	J		
170.					Buy (add'l)	03/14/16	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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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)
171.					Buy (add'l)	12/20/16	J		
172. -T Rowe Price Overseas Stock I CL	A	Dividend	J	T	Spinoff (from line 194)	10/27/16	J		
173. -T Rowe Price Emerg Markets Stock Fund I	A	Dividend	J	T	Spinoff (from line 154)	10/27/16	J		
174. -T Rowe Price International STK I	A	Dividend	J	T	Spinoff (from line 141)	10/18/16	J		
175.					Buy (add'l)	10/26/16	J		
176.					Sold (part)	12/20/16	J		
177. -Wasatch Frontier Emerging Small Co's		None	J	T	Buy	03/14/16	J		
178.					Buy (add'l)	05/17/16	J		
179.					Buy (add'l)	12/20/16	J		
180. -Blackrock High Yld BD Port CL K	A	Dividend	J	T	Buy	03/14/16	J		
181. -Ishares S&P Small CAP 600 Value	A	Dividend	J	T	Buy	01/11/16	J		
182. -Mainstay Tax Free Bond Class A	A	Dividend	J	T	Buy	12/20/16	J		
183. -Wells Fargo Ultra SHT Muni Inc ADM	A	Dividend	J	T	Spinoff (from line 192)	10/27/16	J		
184.					Buy (add'l)	12/20/16	J		
185. -Fidelity Government Cash Reserves (X)	A	Interest	J	T					
186. -Flexshares Trust Morningstar Global Upstream Nat Res IDX	A	Dividend	J	T	Buy	10/28/16	J		
187. -Ishares TR EAFE Smal CP ETF	A	Dividend	J	T	Buy	10/28/16	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 \$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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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)
188.					Buy (add'l)	12/22/16	J		
189. -Ishares Inc Core MSCI Emerging Mkts	A	Dividend	J	T	Buy	05/19/16	J		
190. -Select Sector SPDR TR RL EST SEL SEC		None			Spinoff (from line 138)	09/22/16	J		
191.					Sold	10/21/16	J		
192. -Wells Fargo Ultra SH Term Muni Inc Ins		None			Buy	09/30/16	J		
193.					Closed	10/27/16	J		
194. -T Rowe Price Overseas Stock Fund	A	Dividend			Buy	03/14/16	J		
195.					Closed	10/27/16	J		
196. -Eaton Vance Income Fund Of Boston CL A	A	Dividend	J	T	Spinoff (from line 160)	10/18/16	J		
197. IRA ROLLOVER ACCT NO 2(H)									
198. -Fidelity Cash Reserves		None			Closed	01/01/16	J		
199. -Fidelity Government Cash Reserves (X)	A	Interest	J	T					
200. IRA- 3(H)	A	Interest	J	T					
201. -Schwab US Treas Money Fund	A	Interest	J	T					
202. SI INVEST ACCOUNT (IRA) (H)									
203. -Schwab US Treas Money Fund	A	Interest	O	T					
204. -American Express	B	Dividend	L	T					

1. Income Gain Codes:	A = \$1,000 or less	B = \$1,001 - \$2,500	C = \$2,501 - \$5,000	D = \$5,001 - \$15,000	E = \$15,001 - \$50,000
(See Columns B1 and D4)	F = \$50,001 - \$100,000	G = \$100,001 - \$1,000,000	H1 = \$1,000,001 - \$5,000,000	H2 = More than \$5,000,000	
2. Value Codes	J = \$15,000 or less	K = \$15,001 - \$50,000	L = \$50,001 - \$100,000	M = \$100,001 - \$250,000	
(See Columns C1 and D3)	N = \$250,001 - \$500,000	O = \$500,001 - \$1,000,000	P1 = \$1,000,001 - \$5,000,000	P2 = \$5,000,001 - \$25,000,000	
	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
3. Value Method Codes	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
(See Column C2)	U = Book Value	V = Other	W = Estimated		

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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)
205. -Apple Inc Com	C	Dividend	M	T					
206. -Avago Technologies Ltd Shs					Merged (with line 237)	02/01/16	L		
207. -Capital One Finl Corp Com	B	Dividend	L	T					
208. -Caterpillar Inc Del	C	Dividend	L	T					
209. -Chevron Corp New Com	B	Dividend			Sold	09/09/16	L		
210. -Cognizant Tech Solutns Cl A		None	L	T					
211. -Emerson Electric	B	Dividend	K	T					
212. -Exxon Mobil Corp	C	Dividend	L	T					
213. -Goldman Sachs Group Com	B	Dividend	M	T					
214. -Iberiabank Corp Com	A	Dividend	L	T					
215. -Invesco Ltd Shs	B	Dividend	L	T					
216. -J P Morgan Chase & Co	C	Dividend	M	T					
217. -Mondelez Intl Inc Cl A	A	Dividend	L	T					
218. -Oracle Corp	B	Dividend	L	T					
219. -Qualcomm Inc Com	B	Dividend	L	T					
220. -Roche Hldg Ltd Sponsored Adr	B	Dividend	L	T					
221. -Salesforce Com Inc Com	B	Dividend	L	T					

1. Income Gain Codes:	A ~\$1,000 or less	B ~\$1,001 - \$2,500	C ~\$2,501 - \$5,000	D ~\$5,001 - \$15,000	E ~\$15,001 - \$50,000
(See Columns B1 and D4)	F ~\$50,001 - \$100,000	G ~\$100,001 - \$1,000,000	H1 ~\$1,000,001 - \$5,000,000	H2 ~More than \$5,000,000	
2. Value Codes	J ~\$15,000 or less	K ~\$15,001 - \$50,000	L ~\$50,001 - \$100,000	M ~\$100,001 - \$250,000	
(See Columns C1 and D3)	N ~\$250,001 - \$500,000	O ~\$500,001 - \$1,000,000	P1 ~\$1,000,001 - \$5,000,000	P2 ~\$5,000,001 - \$25,000,000	
	P3 ~\$25,000,001 - \$50,000,000		P4 ~More than \$50,000,000		
3. Value Method Codes	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
(See Column C2)	U =Book Value	V =Other	W =Estimated		

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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.)

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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)
222. -Schlumberger		None	L	T					
223. -Siemens A G Sponsored Adr	B	Dividend	L	T					
224. -Target Corp		None			Sold	01/01/16	L	A	
225. -Thermo Fisher Scientific Inc	A	Dividend	L	T					
226. -Verizon Communications Com	C	Dividend	M	T					
227. -Alphabet Inc. CL A		None	L	T					
228. -Alphabet Inc. CL C		None	M	T					
229. -Coca-Cola Company	B	Dividend	L	T					
230. -Diageo PL C Spon ADR new	B	Dividend	K	T					
231. -Flowers Foods Inc	A	Dividend			Sold	05/04/16	K	B	
232. -Gilead Sciences Inc Com	B	Dividend	L	T					
233. -Johnson & Johnson Com	B	Dividend	L	T					
234. -Lululemon Athletica In Com		None			Sold	04/12/16	L	E	
235. -Pfizer Inc	B	Dividend	K	T	Buy	03/03/16	K		
236. -Occidental Pete Corp		None	K	T	Buy	09/08/16	L		
237. -Broadcom Ltd Shs	B	Dividend	L	T					
238. First Republic Bank (name correction)	A	Interest	K	T					

1. Income Gain Codes:	A = \$1,000 or less	B = \$1,001 - \$2,500	C = \$2,501 - \$5,000	D = \$5,001 - \$15,000	E = \$15,001 - \$50,000
(See Columns B1 and D4)	F = \$50,001 - \$100,000	G = \$100,001 - \$1,000,000	H1 = \$1,000,001 - \$5,000,000	H2 = More than \$5,000,000	
2. Value Codes	J = \$15,000 or less	K = \$15,001 - \$50,000	L = \$50,001 - \$100,000	M = \$100,001 - \$250,000	
(See Columns C1 and D3)	N = \$250,001 - \$500,000	O = \$500,001 - \$1,000,000	P1 = \$1,000,001 - \$5,000,000	P2 = \$5,000,001 - \$25,000,000	
	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
3. Value Method Codes	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
(See Column C2)	U = Book Value	V = Other	W = Estimated		

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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)

239. Adams Moutain LLC see note Part VIII		None	L	W					
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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	Date of Report
Lynch, Sandra L.	12/15/2017

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

Part VII - Investment Limited partnership income whether passive or nonpassive is disclosed as "dividend" income.

Part VII - All investments are publicly traded common stocks or mutual funds unless otherwise noted.

Part VII - Esplanade Capital ptmrs I LLC is a non-publically trade LLC. The net income from the investment is reported as dividend.

Part VII - Line 5 portfolio no longer use "Fidelity Cash Reserves" as cash reserve, portfolio use Line 6 "Fidelity Government Cash Reserves" as cash reserve in 2016

Part VII - Line 185 is a cash reserve account

Part VII - Line 198 portfolio no longer use "Fidelity Cash Reserves" as cash reserve, portfolio use Line 199 "Fidelity Government Cash Reserves" as cash reserve in 2016

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Name of Person Reporting

Lynch, Sandra L.

Date of Report

12/15/2017

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/ **Sandra L. Lynch**

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