

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2018

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) Wilson, Charles R.	2. Court or Organization USCA - 11th Circuit	3. Date of Report 04/29/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) United States Circuit Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2018 to 12/31/2018
7. Chambers or Office Address U.S. Courthouse 801 N. Florida Avenue, Suite 16-B Tampa, FL 33602		
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. Advisory Council Member	Notre Dame Law School Advisory Council
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.

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.)*

SOURCE

DATES

LOCATION

PURPOSE

ITEMS PAID OR PROVIDED

1. University of Notre Dame

09/27/2018-09/30/2018

South Bend, IN

Advisory Council Meeting

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.)*

	<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.	American Express	Revolving credit card	J
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. Rental Property, Santa Rosa Beach, FL	C	Rent	O	W					
2. Regions 401K									
3. Regions Stock Fund	A			T	Sold			C	
4. Dodge Cox Int'l Stock Fund	A				Sold	01/04/18		A	
5. Eaton Vance Cap Fd	A				Sold	01/04/18		A	
6. Vanguard Windsor II Fund	A				Sold	01/04/18		A	
7. Morley Stable Value Fund Free	A				Sold	01/04/18		A	
8. Chase IRA (H)									
9. JP Morgan US Gov't MM Funds QVESQ	A	Interest	J	T					
10. Brown Advisory Fund BAFHX		Dividend		T	Sold (part)	02/21/18	J	A	
11. Brown Advisory Fund BAFHX		Dividend		T	Sold (part)	06/13/18	J	A	
12. Brown Advisory Fund BAFHX		Dividend	J	T	Sold (part)	07/12/18	J	A	
13. Dodge & Cox Int'l DODFX	A	Dividend	J	T	Sold (part)	10/16/18	J	A	
14. I Shares ETF EWJ		Dividend	J	T	Sold (part)	06/26/18	J	A	
15. I Shares ETF - EWJ				T	Sold	11/27/18	J	A	
16. I Shares MSCI Japan ETF - MSCI ETF - EFA			J	T	Sold (part)	01/19/18	J	A	
17. I Shares MSCI ETF - EFA		Dividend	J	T	Sold (part)	06/13/18	J	A	

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	
3. Value Method Codes	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
(See Column C2)	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
	U = Book Value	V = Other	W = Estimated		

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18. I Shares MSCI Eafe EFA			J	T	Sold (part)	07/12/18	J	A	
19. I Shares MSCI - EFA			J	T	Sold	08/15/18	J	A	
20. JP Morgan TR 1 - JUEMX	A	Dividend	J	T	Sold (part)	06/26/18	J	A	
21. JP Morgan TR1 - JUEMX	A	Dividend	J	T	Sold (part)	10/16/18	J	A	
22. JP Morgan TR1 - JUEMX	A	Dividend		T	Sold	11/28/18	J	A	
23. Massachusetts Investors TR MITIX to MITJX			J	T	Sold (part)	06/02/18	J	A	
24. Massachusetts Investors TR MITIX to MITJX	A	Dividend	J	T	Sold (part)	10/16/18	J	A	
25. Massachusetts Investors TR - MITIX to MITJX					Sold	11/27/18	J	A	
26. SPDR S & P ETF SPY	A	Dividend	J	T	Sold (part)	01/19/18	J	A	
27. SPDR S & P ETF SPY	A	Dividend	J	T	Sold (part)	11/29/18	J	A	
28. SPDR S & P ETF SPY				T	Sold	11/29/18	K	C	
29. Vanguard Index VFIAX	A	Dividend	J	T			J		
30. Vanguard Index VFIAX	A	Dividend	J	T	Buy	01/19/18	J		
31. Vanguard Index VFIAX	A	Dividend	J	T	Buy	06/12/18	J		
32. Vanguard Index VFI AX	A	Dividend	J	T	Buy	07/12/18	J		
33. Vanguard Index VFIAX	A	Dividend	J	T	Buy	09/21/18	J		
34. Causeway Cap Int TR - CIVIX	A	Dividend	J	T	Sold (part)	09/21/18	J	A	

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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. Causeway Cap TR CIVIX	A	Dividend	J	T	Sold (part)	10/16/18	J	A	
36. Dodge & Cox Inc. Fd DODIX	A	Dividend	J	T	Sold (part)	11/27/18	J	A	
37. Dodge & Cox Inc. Fd DODIX	A	Dividend	J	T	Sold (part)	12/17/18	J	A	
38. Dodge & Cox Inc. Fd DODIX	A	Dividend	J	T			J	A	
39. Federated Int'l TR FIHLX			J	T	Buy	11/27/18	J	A	
40. Federated Int'l TR FIHLX	A	Dividend	J	T					
41. John Hancock Inc. - JSTIX (Exchanged to JSNWX)	A	Dividend	J	T	Sold (part)	09/19/18	J	A	
42. John Hancock Inc. - JSNWX	A	Dividend	J	T	Sold (part)	06/26/18	J	A	
43. John Hancock Inc - JSNWX	A	Dividend	J	T	Sold (part)	11/27/18	J	A	
44. John Hancock Inc - JSNWX	A	Dividend	J	T	Sold (part)	12/17/18	J	A	
45. MFS Ser TR Emerging MEDIX	A	Dividend	J	T	Sold (part)	02/21/18	J	A	
46. MFS Ser TR Emerging MEDHX	A	Dividend	J	T					
47. PIMCO PAC Inv PIGIX			J	T	Buy	01/27/18	J		
48. PIMCO PAC Inv PIGIX	A	Dividend	J	T					
49. PIMCO Total Return PTTRX	A	Dividend	J	T	Sold (part)	11/27/18	J	A	
50. PIMCO Total Return PTTRX	A	Dividend	J	T	Sold (part)	12/17/18	J	A	
51. PIMCO Total Return PTTRX	A	Dividend	J	T					

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52. Vanguard Charlotte Funds - VTABX	A	Dividend	K	T					
53. Vanguard Fixed Inc VFIDX	A	Dividend	J	T					
54. Vanguard Fixed Inc VFIDX			J	T	Buy	11/27/18	J		
55. Vanguard SH Term Bond - VBIRX	A	Dividend			Sold (part)	01/19/18	J		
56. Vanguard Sh Term Bond - VBIRX	A	Dividend			Sold (part)	02/25/18	J		
57. Vanguard - Sh Term Bond - VBIRX					Sold	02/12/18	J		
58. Vanguard Int'l Equity VGK	A	Dividend			Sold	06/13/18	J	A	
59. MFS Research Int'l MRSIX (MRSKX) See Item 5					Sold (part)	11/19/18	J	A	
60. See Item 4 MFS Research MRSKX					Sold (part)	08/15/18	J	A	
61. MFS Research - MRSKX					Sold (part)	09/21/18	J	A	
62. MFS Research - MRSKX					Sold (part)	10/16/18	J	A	
63. MFS Research - MRSKX	A	Dividend	J	T					
64. MFS Research - MRSKX			J	T	Buy	11/28/18			
65. Harris Inv TR - OANMX			J	T	Sold (part)	01/19/18	J	A	
66. Harris Inv TR - OANMX			J	T	Sold (part)	10/16/18	J	A	
67. Harris Inv TR OANMX			J	T	Sold	11/27/18	J	A	
68.									

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
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69. Lord Abbott Sh Duration - LOLDX	A	Dividend	J	T	Sold (part)	01/19/18	J	A	
70. Lord Abbott Sh Duration - LOLDX	A	Dividend	J	T	Sold	01/31/18	J	A	
71. Mainstay High Yield MHYSX	A	Dividend	J	T	Sold (part)	01/19/18	J	A	
72. Mainstay High Yield MHYSX	A	Dividend	J	T	Sold (part)	02/05/18	J	A	
73. Mainstay High Yield MHYSX	A	Dividend	J	T	Sold	02/21/18	J	A	
74. T Rowe Price New Income - PRXEX	A	Dividend	J	T	Buy	01/19/18	J		
75. T Rowe Price New Income - PRXEX	A	Dividend			Sold (part)	06/26/18	J	A	
76. T Rowe Price New Income - PRXEX	A	Dividend			Sold (part)	11/27/18	J		
77. JP Morgan Core Bd. JCUBX	A	Dividend	J	T					
78. JP Morgan Core Bd JCUBX			J	T	Buy	01/19/18			
79. JP Morgan Core Bd - JCUBX			J	T	Buy	02/05/18			
80. JP Morgan Core Bd - JCUBX			J	T	Buy	03/18/18			
81. JP Morgan Core Bd - JCUBX	A	Dividend			Sold (part)	06/26/18	J		
82. JP Morgan Core Bd - JCUBX	A	Dividend			Sold (part)	11/27/18			
83.									
84. Vanguard Bd Index - VBTLX	A	Dividend	J	T	Buy	10/04/18	J		
85. Vanguard Bd Index - VBTLX	A	Dividend	J	T	Buy	11/27/18	J		

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86. Fidelity Index Fd FXAIX	A	Dividend	J	T	Buy	02/09/18	J		
87. Fidelity Index Fd FXAIX	A	Dividend	J	T	Buy	02/21/18	J		
88. Fidelity Index Fd FXAIX			K	T	Buy	11/29/18	K		
89. JP Morgan Exch BBCA	A	Dividend	J	T					
90. JP Morgan Exch BBCA			J	T	Buy	08/15/18			
91. JP Morgan Exch BBCA			J	T	Sold (part)	09/21/18	J		
92. JP Morgan Exch BBCA			J	T	Buy	11/27/18	J		
93. JP Morgan Exch BBAX					Buy	08/15/18	J	A	
94. JP Morgan Exch BBAX	A	Dividend	J	T	Buy	11/27/18	J		
95. JP Morgan Exch BBEU			J	T	Buy	08/15/18	J		
96. JP Morgan Exch ETF BBEU	A	Dividend	J	T	Buy	11/27/18	J		
97. JP Morgan Japan ETF BBJP	A	Dividend	J	T	Buy	07/12/18	J		
98. JP Morgan Japan ETF BBJP	A	Dividend	J	T	Buy	10/16/18	J		
99. JP Morgan Japan ETF BBJP	A	Dividend	J	T	Buy	11/27/18	J		
100. Six Circles Int'l EO CIVEX	A	Dividend	J	T	Buy	10/16/18	J		
101. Six Circles Int'l EO CIVEX	A	Dividend	J	T	Buy	11/27/18	J		
102. Six Circles EO Fd CUSUX	A	Dividend	J	T	Buy	10/16/18	J		

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103. Six Circles EO Fd CUSUX	A	Dividend	J	T	Buy	11/27/18	J		
104. 1 Shares ETF Bond TIP	A	Dividend	J	T	Buy	02/05/18	J		
105. 1 Shares ETF Bond TIP	A	Dividend	J	T	Sold (part)	03/15/18	J		
106. Six Circles Sh Duration CUSDX	A	Dividend	J	T	Buy	10/06/18	J		
107. Six Circles Sh Duration CUSDX	A	Dividend			Sold (part)	11/27/18	J	A	
108. Vanguard Sh Term Bd BSV	A	Dividend	J	T	Buy	06/13/18	J		
109. Vanguard Sh Term Bd BSV	A	Dividend	J	T	Sold (part)	10/04/18	J		
110. Vanguard Int'l ETF BNDX	A	Dividend	J	T	Buy	01/19/18	J		
111. Vanguard Int'l ETF BNDX	A	Dividend			Sold (part)	06/26/18	J		
112. Vanguard Int'l ETF BNDX	A	Dividend			Sold (part)	11/27/18	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	

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wilson, Charles R.

Date of Report

04/29/2019

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

- 1) Line 11 of 2017 filing -- BRMKX was a total sale not partial.
- 2) Line 25 of 2017 filing -- VFIA (symbol typo) -- correction VFIA.
- 3) Line 29 of 2017 filing -- FIHBX (symbol typo) FIHLX.
- 4) Line 31 of 2017 filing -- MEDIX
Exchanged 5/11/18 -- MEDHX
- 5) Line 39 of 2017 filing - MRSIX
Exchanged 7/14/17 - MRSKX

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wilson, Charles R.

Date of Report

04/29/2019

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/ Charles R. Wilson**

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