

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) Motz, Diana G.	2. Court or Organization Fourth Circuit Court of Appeals	3. Date of Report 5/6/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Fourth Circuit Judge - active	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 101 West Lombard St., 5th Fl. Baltimore, Maryland 21201		
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.	Custodian	College Savings Plans for grandsons
2.	Trustee	Generation Skipping Trust for Children (GST)
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.	
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. The Administrative Office	May 30 - June 1, 2018	Denver, CO	Attending Judicial Conference Committee on Financial Disclosure meeting	lodging
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.		
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. Aberdeen Asia Pac Income (FAX) (IRA)	B	Int./Div.			Sold	07/13/18	K	A	
2. Altria Group Inc (MO)	B	Dividend	K	T					
3. Apple Inc (AAPL)	D	Dividend	N	T	Sold (part)	07/13/18	K	E	
4. AT&T Inc (T)	C	Dividend	L	T					
5. Campbell Soup Co (CPB)	A	Dividend	J	T					
6. Chevron Corp (CVX)	B	Dividend	K	T					
7. CVS Corp (CVS)	B	Dividend	K	T					
8. DFA T A World Ex US Core Equity (DFTWX)	B	Int./Div.	L	T					
9. DFA Targeted Credit Portfolio (DTCPX) (IRA)	C	Int./Div.	M	T					
10. Duke Realty Corp (DRE)	A	Dividend	K	T					
11. Exxon Mobil Corporation (XOM)	D	Dividend	M	T					
12. FFCB Bond 3.32% 3/22/2024 (3133EJHF9)	A	Interest	K	T	Buy	03/15/18	K		
13. Fidelity 500 Index Fund Instl Prem (FUSVX)	D	Int./Div.			Merged (with line 14)	11/05/18	O		
14. Fidelity 500 Index Fund Premium (FXAIX)	D	Int./Div.	O	T					
15. Fidelity Conservative Income Muni Bond (FMNDX)	A	Int./Div.			Sold	03/07/18	K	A	
16. Fidelity Extended Market Index Fund Premium (FSEVX)	A	Int./Div.			Merged (with line 17)	11/02/18	L		
17. Fidelity Extended Market Index Instl Premium (FSMAX)	C	Int./Div.	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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18. Fidelity Cash Reserves (FDRXX) (IRA)	B	Int./Div.	K	T					
19. Fidelity Inflation Protected Bd Index Premium (FSIYX) (IRA)	A	Int./Div.			Buy	07/13/18	L		
20.					Merged (with line 21)	11/05/18	K		
21. Fidelity Inflation Protected Bd Index Instl Premium (FIPDX) (IRA)	A	Int./Div.	K	T					
22. Fidelity Intermediate Treasury Bond Index Premium (FIBAX) (IRA)	B	Int./Div.			Merged (with line 23)	11/02/18	L		
23. Fidelity Interm Treasury Bond Index Instl Premium (FUAMX) (IRA)	A	Int./Div.	K	T	Sold (part)	12/31/18	K	A	
24. Fidelity Md Municipal Income (SMDMX)	C	Int./Div.	M	T					
25. Fidelity Short Term Treasury Bond Index Premium (FSBAX) (IRA)	A	Int./Div.			Sold (part)	03/21/18	K	A	
26.					Sold (part)	08/09/18	K	A	
27.					Merged (with line 28)	11/05/18	K		
28. Fid S/T Treasury Bond Indx Instl Prem (FUMBX) (IRA)	A	Int./Div.			Sold	12/31/18	K	A	
29. Fidelity Treasury Fund (FZFX)	B	Int./Div.	M	T					
30. General Electric Company (GE)	A	Dividend	J	T					
31. Invesco (formerly PowerShares) S&P 500 Equal Weight (RSP)	C	Int./Div.	M	T					
32. International Business Machines (IBM)	D	Dividend	M	T					
33. iShares Core MSCI EAFE ETF (IEFA) (IRA)		None	K	T	Buy	12/31/18	K		
34. iShares Inc Core Msci Emerging Mkts (IEMG)	A	Int./Div.	K	T					

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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	

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35. iShares MSCI EAFE Small Cap Index (SCZ)	A	Int./Div.	K	T					
36. iShares MSCI Emerging Mkts Minimum Volatility Index (EEMV)	C	Int./Div.	M	T					
37. iShares Russell 1000 Index (IWB)	D	Int./Div.	N	T					
38. iShares Russell 2000 (IWM)	A	Int./Div.	K	T					
39. iShares S&P 100 Index (OEF)	C	Int./Div.	M	T					
40. iShares S&P 500 Index (IVV) (IRA)	D	Int./Div.	N	T	Buy (add'l)	12/31/18	M		
41. iShares S&P 500 Value (IVE)	D	Int./Div.	N	T					
42. iShares S&P SmallCap 600 Citigroup Value Index (IJS)	B	Int./Div.	L	T					
43. iShares S&P SmallCap 600 Index (IJR)	B	Int./Div.	M	T					
44. Kraft Heinz Company (KHC)	A	Dividend	J	T					
45. Linde PLC (LIN)		None			Sold	11/20/18	M	A	
46. Merck & Co Inc (MRK)	A	Dividend	K	T					
47. Mondelez Intl Inc (MDLZ)	A	Dividend	J	T					
48. Nuveen Build Amer Bd Fd (NBB) (IRA)	C	Int./Div.	M	T	Sold (part)	11/21/18	J	A	
49. Nuveen Build America (NBD) (IRA)	C	Int./Div.			Buy (add'l)	05/29/18	K		
50.					Merged (with line 48)	11/16/18	L		
51. Nuveen Credit Strategies Income Fund (JQC) (IRA)	C	Int./Div.	L	T	Buy (add'l)	03/21/18	K		

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52.					Buy (add'l)	12/31/18	J		
53. Nuveen MD Quality Muni Income (NMY)	D	Int./Div.	L	T	Buy (add'l)	02/22/18	K		
54.					Sold (part)	05/29/18	K	A	
55.					Sold (part)	07/13/18	K	A	
56. Nuveen Select Tax-Free Income (NXQ)	C	Int./Div.	L	T					
57. Olin Corp (OLN)	A	Dividend	J	T					
58. Pepsico Incorporated (PEP)	C	Dividend	M	T					
59. Philip Morris Intl Inc (PM)	B	Dividend	K	T					
60. PIMCO Income Instl (PIMIX) (IRA)	D	Int./Div.	L	T	Sold (part)	03/21/18	L	B	
61. Invesco (Formerly PowerShares) Insured Natl Muni Bond (PZA)	B	Int./Div.	L	T					
62. Praxair Inc (PX)	B	Dividend			Merged (with line 45)	10/31/18	M		
63. SPDR S&P 500 ETF Trust (SPY)	C	Int./Div.	M	T					
64. Stanley Black & Decker Inc (SWK)	B	Dividend	L	T					
65. Stone Ridge Reinsurance Risk Premium (SRRIX) (IRA)	C	Int./Div.	M	T	Buy (add'l)	03/21/18	K		
66. T Rowe Price Group Inc (TROW)	D	Dividend	N	T					
67. T Rowe Price MD Tax Free Bond (MDXB)	D	Int./Div.	N	T	Buy (add'l)	10/16/18	K		
68. T Rowe Price Value (TRVLX)	D	Int./Div.	L	T					

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69. Union Pacific Corp (UNP)	D	Dividend	N	T					
70. Vanguard FTSE Developed Markets (VEA)	C	Int./Div.	M	T					
71. Vanguard Hi Yield Tax-Exempt Admiral (VWALX)	D	Int./Div.	M	T	Sold (part)	02/22/18	L	A	
72. Vanguard High Yield Corporate Admiral (VWEAX) (IRA)	A	Int./Div.			Sold	02/22/18	K	A	
73. Vanguard Large Cap (VV)	B	Int./Div.	M	T					
74. Washington Real Estate (WRE)	C	Int./Div.	L	T					
75. Western Asset High Income Opportunity Fund (HIO) (IRA)		None	K	T	Buy	12/31/18	K		
76. Yum China Holdings Inc (YUMC)	A	Dividend	K	T					
77. Yum! Brands Inc (YUM)	B	Dividend	L	T					
78. 529 - Portfolio 2027 (CUST)	A	Int./Div.	M	T					
79. 529 - Vanguard HY Bond (CUST)	A	Int./Div.			Sold (part)	01/04/18	K		
80.					Sold (part)	02/22/18	K		
81.					Sold (part)	05/31/18	K		
82.					Sold	08/28/18	K		
83. 529 - Portfolio 2030 (CUST)	A	Int./Div.	K	T					
84. 529 - Bond and Income Portfolio (CUST)	A	Int./Div.	M	T					
85. 529-Vanguard Total Bond Market Index Portfolio (CUST)	A	Int./Div.	M	T	Buy (add'l)	01/04/18	K		

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86.					Buy (add'l)	02/22/18	J		
87.					Buy (add'l)	03/08/18	K		
88.					Buy (add'l)	05/31/18	K		
89.					Sold (part)	08/28/18	J		
90.					Sold (part)	12/31/18	J		
91.	529 - Vanguard Total International Stock Index Portfolio (CUST)	A	Int./Div.	L	T	Buy (add'l)	01/04/18	J	
92.					Buy (add'l)	02/22/18	J		
93.					Buy (add'l)	03/08/18	J		
94.					Buy (add'l)	05/31/18	J		
95.					Buy (add'l)	08/28/18	J		
96.					Buy (add'l)	12/31/18	J		
97.	529 - Vanguard Total Stock Market Index Portfolio (CUST)	A	Int./Div.	M	T	Buy (add'l)	01/04/18	K	
98.					Buy (add'l)	02/22/18	J		
99.					Buy (add'l)	03/08/18	K		
100.					Buy (add'l)	05/31/18	J		
101.					Buy (add'l)	08/28/18	J		
102.					Buy (add'l)	12/31/18	J		

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103. 529 - Vanguard Interest Accumulation Portfolio	A	Int./Div.	K	T	Buy	08/28/18	K		
104.					Buy (add'l)	12/31/18	J		
105. -TRP Blue Chip Growth (TRBCX) (GST)	D	Int./Div.	N	T					
106. -TRP Int Bond (RPIBX) (GST)	A	Int./Div.	K	T					
107. -TRP Int Stock (PRITX) (GST)	C	Int./Div.	K	T					
108. -TRP Equity Income (PRFDX) (GST)	D	Int./Div.	M	T					
109. -TRP Global Stock (PRGSX) (GST)	D	Int./Div.	M	T					
110. -TRP Growth Stock (PRGFX) (GST)	E	Int./Div.	N	T					
111. -TRP New Era (PRNEX) (GST)	A	Int./Div.	K	T					
112. -TRP Government Money (PRRXX) (GST)	C	Int./Div.	M	T					
113. -TRP Spectrum Growth (PRSGX) (GST)	D	Int./Div.	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	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	P4 ~More than \$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	

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Name of Person Reporting

Motz, Diana G.

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

- Fidelity Extended Market Index Fund Premium (FSEVX) on line 16 of the 2018 report, was consolidated into Fidelity Extended Market Index Instl Premium (FSMAX) on line 17 of the 2018 report
- Fidelity 500 Index Fund Premium (FUSVX) on line 13 of the 2018 report, was consolidated into Fidelity 500 Index Instl Premium (FXAIX) on line 14 of the 2018 report
- Fidelity Inflation Protected Bd Index Premium (FSIYX) on line 19 of the 2018 report, was consolidated into Fidelity Inflation Protected Bd Index Instl Premium (FIPDX) on line 21 of the 2018 report
- Fidelity Intermediate Treasury Bond Index Premium (FIBAX) on line 22 of the 2018 report, was consolidated into Fidelity Intermediate Treasury Bond Index Instl Premium (FUAMX) on line 23 of the 2018 report
- Fidelity Short Term Treasury Bond Idex Premium (FSBAX) on line 25 of the 2018 report, was consolidated into Fidelity S/T Treasury Bond Index Instl Premium (FUMBX) on line 28 of the 2018 report
- Nuveen Build America (NBD) on line 49 of the 2018 report, was merged into Nuveen Build America Bond Fund (NBB) on line 48 of the 2018 report
- Praxair Inc (PX) on line 62 of the 2018 report, was merged into Linde PLC (LIN) on line 45 of the 2018 report and LIN was sold on 11/20/18

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Name of Person Reporting

Motz, Diana G.

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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/ **Diana G. Motz**

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