

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2014

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) Moberly, Robyn L.	2. Court or Organization U.S. Bankruptcy Court for the Southern District of Indiana	3. Date of Report 08/03/2015
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Bankruptcy Judge- Active	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☒ Amended Report	6. Reporting Period 01/01/2014 to 12/31/2014
7. Chambers or Office Address 317 Birch Bayh Federal Building and Federal Courthouse 46 East Ohio Street Indianapolis, Indiana 46204		
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. President	Indiana University McKinney School of Law Alumni Association
2. President-Elect	Indianapolis Bar Association
3. Executor	Estates of [REDACTED]
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.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 10

Name of Person Reporting

Moberly, Robyn L.

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08/03/2015

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.)*DATESOURCE AND TYPEINCOME
(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.)*DATESOURCE AND TYPE

1. 2014

Whitham Hebenstreit and Zubek, attorneys at law

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.)*SOURCEDATESLOCATIONPURPOSEITEMS PAID OR PROVIDED

1. _____

2. _____

3. _____

4. _____

5. _____

FINANCIAL DISCLOSURE REPORT

Page 3 of 10

Name of Person Reporting

Moberly, Robyn L.

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08/03/2015

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.	Bank of America	consumer credit	J
2.	Citibank	consumer credit	J
3.	Chase Bank	consumer credit	K
4.			
5.			

FINANCIAL DISCLOSURE REPORT

Page 4 of 10

Name of Person Reporting

Moberly, Robyn L.

Date of Report

08/03/2015

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. AT&T stock	D	Dividend	M	T					
2. American Electric Power	A	Dividend	J	T					
3. Frontier Communications	A	Dividend	J	T					
4. Wells Fargo & Co.	C	Dividend	M	T					
5. Marshall & Isley Bank	A	Interest	K	T					
6. Verizon	A	Dividend	J	T					
7. New Mexico Apache Corp. mineral lease rights	D	Royalty	J	W					
8. Yates Petroleum Corp. mineral rights	A	Royalty	J	W					
9. Cimarex Energy Co.	A	Royalty	J	W					
10. Chesapeake Operating Inc, Oklahoma City, OK	A	Royalty	J	W					
11. Merit Energy	A	Royalty	J	W					
12. Endeavor Energy Resources LP, Midland TX	A	Royalty	J	W					
13. Three Rivers Operating Co	A	Royalty	J	W					
14. Coca Cola Co.	C	Dividend	M	T					
15. Eli Lilly Co.	A	Dividend	K	T					
16. IBM	A	Dividend	K	T					
17. Kimberly Clark	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 \$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	

FINANCIAL DISCLOSURE REPORT

Page 5 of 10

Name of Person Reporting

Moberly, Robyn L.

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18. Merck	A	Dividend	J	T					
19. AT&T (Y)									
20. Chevron	D	Dividend	M	T					
21. Exxon Mobil	C	Dividend	M	T					
22. GE	A	Dividend	K	T					
23. Public Storage (REIT)	B	Distribution	L	T					
24. Value Line Larger Companies Fund	A	Dividend	L	T					
25. Fidelity Diversified International Fund.	A	Dividend	K	T					
26. Fidelity Low-Priced Stock Fund	A	Dividend	J	T					
27. Wells Fargo Advatage Capital Growth I	A	Dividend	K	T					
28. Blackrock Large Cap Value Retirement K	A	Dividend	K	T					
29. PIMCO total REturn Instl	A	Dividend	K	T					
30. Merrill Lynch Bank Deposit	B	Interest	M	T					
31. CIT Bank Salt Lake City UT Certificate of Deposit	A	Int./Div.	K	T					
32. Centurylink -(Y)									
33. DTE Energy Corp.	A	Dividend	J	T					
34. Exelon (Y)									

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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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FINANCIAL DISCLOSURE REPORT

Page 6 of 10

Name of Person Reporting

Moberly, Robyn L.

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35. Piedmont Natural Gas	A	Dividend	J	T					
36. Southern Company	A	Dividend	J	T					
37. Windstream (Y)									
38. Cert of Deposit American Express Bank Salt Lake City UT	A	Interest	K	T					
39. Cert of Deposit St. Louis, Mo. Indl Dev Auth Rev St. A OID	A	Interest			Sold	04/15/14	J		
40. Cert of Deposit Univ of Texas Perm Univ	A	Interest			Sold	01/02/14	J		
41. Ally Financial Inc.	B	Dividend	K	T	Distributed (part)	10/17/14	K		siblings
42. Royal Bank of Scotland Grp PLC	A	Dividend	J	T					
43. Bank of America Corp	A	Dividend	K	T					
44. Cisco Systems Inc	A	Dividend	J	T					
45. Citigroup, Inc.	A	Dividend	J	T					
46. CNO Financial Group, Inc.	A	Dividend	J	T					
47. Southwest Airlines	A	Dividend	J	T					
48. Travelers Co.	A	Dividend	J	T					
49. Vodafone Group PLC	A	Dividend	J	T					
50. AllianceBernstein Global Thematic Growth Fund CI A		None	J	T					
51. Nuveen Investment Quality Municipal Fund	A	Dividend	J	T					

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FINANCIAL DISCLOSURE REPORT

Page 7 of 10

Name of Person Reporting

Moberly, Robyn L.

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08/03/2015

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52. Express Scripts Holding Co	A	Dividend	J	T					
53. Dallas Fort Worth Texas IAF IMP RV AMERN RF GTD OID (y)									
54. JP Morgan Chase & Co	B	Dividend	L	T					
55. American Express Bank (Y)									
56. American Growth Fund	A	Int./Div.	K	T					
57. American Capital (2 accounts)	A	Int./Div.	J	T					
58. American Capital World Growth & Income (2 accounts combined)	A	Int./Div.	K	T					
59. Clearbridge Aggressive Growth (Y)									
60. CD- Synchrony BK FKA GE	A	Int./Div.	J	T					
61. CD-Synchrony BK FKA GE	A	Int./Div.	J	T					
62. American Airlines Group (x)	A	Dividend	K	T					
63. Entergy Corp (x)	A	Dividend	J	T					
64. General Motors Common shares (x)	A	Dividend	J	T					
65.			J	T					
66. Oppenheimer Funds- Rising Dividend Fund A	A	Dividend	J	T					
67. Oppenheimer Funds- Equity Fund A	A	Dividend	K	T					
68. Oppenheimer Funds- Capital Appreciation Fund A	A	Dividend	J	T					

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FINANCIAL DISCLOSURE REPORT

Page 8 of 10

Name of Person Reporting

Moberly, Robyn L.

Date of Report

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69. Oppenheimer Funds-International Growth Fund A	A	Dividend	J	T					

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FINANCIAL DISCLOSURE REPORT

Page 9 of 10

Name of Person Reporting

Moberly, Robyn L.

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08/03/2015

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

Part VII.

I made an error last year in the listing of a CD American Express (line 38) and American Express Bank (line 55). These were duplicates and therefore I have eliminated line 55.

Line 53. Dallas Forth Worth Texas IAF IMP RV bond (line 53 in the 2013 report) was converted in the American Airlines bankruptcy to American Airlines stock and is now reflected as line item 62.

Line item 19 is now blank. I had listed AT&T stock in both lines 1 and 19 for 2013 because I controlled some AT&T stock on behalf of [REDACTED] and I owned some stock outright in my own name. Since [REDACTED] death, I have distributed [REDACTED] share to them and now only retain one AT&T account in my name alone.

Lines 66-69. Oppenheimer Funds has been amended to show the 4 Fund names where [REDACTED] has investments. In addition, I did not know in prior years that he owned this investment and therefore I inadvertently omitted it from my Disclosure Form. [REDACTED] has owned these same Oppenheimer Funds for more than ten years. They are not newly acquired and should have been disclosed in each of my prior Disclosure Forms. The failure to disclose them was inadvertent.

FINANCIAL DISCLOSURE REPORT

Page 10 of 10

Name of Person Reporting

Moberly, Robyn L.

Date of Report

08/03/2015

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/ Robyn L. Moberly

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
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544