

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) Oldshue, Jr., Jerry C.	2. Court or Organization Alabama Southern District Bankruptcy Court	3. Date of Report 05/15/2018
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Bankruptcy 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 United States Bankruptcy Court 201 St. Louis Street Mobile, AL 36602-6602		
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.)*

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. Alabama State Bar Bankruptcy CLE	June 1-3, 2017	Destin, FL	Bankruptcy CLE	Transportation, meals, and lodging
2. Cumberland Law School CLE	October 5-6, 2017	Birmingham, AL	Bankruptcy CLE	Transportation, meals, and lodging
3. Florida State Bar Bankruptcy CLE	October 19-20, 2017	Tallahassee, FL	Bankruptcy CLE	Transportation, meals, and lodging
4. University of Alabama School of Law Bankruptcy CLE	November 16-17, 2017	Birmingham, AL	Bankruptcy CLE	Transportation, meals, and lodging
5. Mobile/Baldwin County Bench and Bar CLE	December 1-2, 2017	Point Clear, AL	Bankruptcy CLE	Transportation, meals, and lodging

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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.	Chase Bank	Credit Card	None
2.	Capital One	Credit Card	None
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. Synovus Bank account	A	Interest	K	T					
2. Capstone Bank account	A	Interest	K	T					
3. IRA #1 (H)									
4. - MORGAN STANLEY (Y)									
5. - ISHARES INC MSCI JAPAN RTF	A	Dividend	J	T	Buy	04/11/17	J		
6.					Buy (add'l)	08/24/17	J		
7. - ISHARES JP MORGAN EM BOND ETF	A	Dividend	J	T	Buy	04/11/17	J		
8. - BLACKROCK EQUITY DIVIDEND	A	Dividend	J	T	Buy	08/11/17	J		
9.					Sold (part)	08/21/17	J		
10. - BLACKSTONE ALT MULT- STRATINIST	A	Dividend	K	T	Buy (add'l)	04/11/17	J		
11. - WILLIAM BLAIR INTL GROWTH	A	Dividend	K	T	Sold (part)	08/08/17	K	B	
12.					Buy (add'l)	04/11/17	J		
13.					Buy (add'l)	08/24/17	J		
14. - INVESCO GLB REAL ESTATE Y	A	Dividend	J	T	Buy	08/11/17	J		
15. - INVESCO INTL GROWTH	A	Dividend	K	T	Sold (part)	08/08/17	J	B	
16.					Buy (add'l)	04/11/17	J		
17.					Buy (add'l)	08/24/17	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 H ~\$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 ~\$250,000.01 - \$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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18. - HARDING LOEVNER EMERG MKTS ADV	A	Dividend	K	T	Buy (add'l)	08/24/17	J		
19. - COLUMBIA SEL LARGE CAP VAL	A	Dividend	J	T	Sold (part)	04/06/17	J	A	
20.					Sold (part)	08/21/17	J	A	
21. - COLUMBIA SELECT LG CP GROWTH	B	Dividend	J	T	Sold (part)	04/06/17	J		
22.					Sold (part)	08/21/17	J		
23. - CONGRESS MID CAP GROWTH INSTL	A	Dividend	J	T	Buy	08/11/17	J		
24. - DAVIS NEW YORK VENTURE	A	Dividend			Sold	04/06/17	J		
25.					Sold	08/08/17	J	A	
26. - PRUDENTIAL JENNISON GROWTH	A	Dividend	J	T	Sold (part)	04/06/17	J	A	
27.					Sold (part)	08/21/17	J	A	
28. - JANUS HENDERSON FLEXIBLE BOND	A	Dividend	K	T	Buy (add'l)	04/11/17	J		
29.					Buy (add'l)	08/24/17	J		
30.					Buy (add'l)	12/19/17	J		
31. - JANUS HENDERSON INTL OPP I	A	Dividend	K	T	Buy	08/11/17	K		
32.					Buy (add'l)	08/24/17	J		
33. - LOCORR MACRO STRATEGIES I	A	Dividend	J	T	Buy	08/11/17	J		
34. - LORD ABBETT SHT DURATION INC	A	Dividend	K	T	Sold (part)	04/06/17	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	
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35. - AQR MANAGED FUTURES STRATEGY					Sold	08/08/17	J		
36.					Buy (add'l)	04/11/17	J		
37. - DIAMOND HILL LONG-SHORT	A	Dividend	K	T	Buy (add'l)	04/11/17	J		
38. - IVY MID CAP GROWTH					Sold	04/06/17	J		
39.					Sold	08/08/17	J	A	
40. - VICTORY RS VALUE	A	Dividend	J	T	Sold (part)	04/06/17	J		
41.					Buy (add'l)	12/27/17	J		
42. - VICTORY RS SMALL CAP GROWTH	A	Dividend	J	T	Sold (part)	08/21/17	J	A	
43. - VICTORY RS PARTNERS	B	Dividend	J	T	Sold (part)	08/21/17	J	A	
44. - OPI STEELPATH MLP SELECT 40 Y	A	Dividend	J	T	Buy (add'l)	04/11/17	J		
45.					Buy (add'l)	08/11/17	J		
46. - BLACKROCK HI YIELD BD PTF INST	A	Dividend	J	T					
47. - VOYA GLOBAL REAL ESTATE	A	Dividend			Sold	08/08/17	J	A	
48. - PIMCO SHORT TERM	A	Dividend	J	T	Buy (add'l)	08/24/17	J		
49. - PIMCO FOREIGN BD	A	Dividend			Sold	04/06/17	J	A	
50. 529 PLANS (H)									
51. - T ROWE PRICE US SMALL CAP GROWTH		None	J	T					

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52. - AMER CENT EQ GX C 529 (X)		None	J	T					
53. - PIMCO SHORT-TERM 529		None	J	T					
54. - NORTHERN BOND INDEX 529		None	J	T					
55. - T. ROWE PRICE BALANCED 529		None	J	T					
56. - T. ROWE PRICE REAL ESTATE 529		None	J	T					
57. - T. ROWE PRICE LARGE CAP GROWTH 529		None	K	T					
58. - NORTHERN MID-CAP INDEX 529		None	J	T					
59. - NORTHERN SMALL CAP INDEX 529		None	J	T					
60. - NORTHERN FUNDS INTERNATIONAL EQUITY INDEX 529		None	J	T					
61. - NEUBRGH INTL LGCP C 529 (X)		None	J	T					
62. - LAZARD EMERGING MARKETS 529		None	J	T					
63. - COHEN & STEERS DIVIDEND VALUE 529		None	K	T					
64. BROKERAGE ACCOUNT #1 (H)									
65. - ALPHABET INC CLASS C COMMON STOCK		None	J	T					
66. - AMAZON.COM INC COM		None	J	T					
67. - APPLE INC COM COMMON STOCK	A	Dividend	J	T					
68. - CONSTELLATION BRANDS INC COM CL A (X)	A	Dividend	J	T					

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69. - MICROSOFT CORP COM (X)	A	Dividend	J	T					
70. IRA #2 (H)									
71. - MORGAN STANLEY (X)	A	Interest	J	T					
72. - BLACKROCK INFLAT PROT BOND I	A	Dividend	J	T	Buy	08/23/17	J		
73. - CALAMOS MARKET NEUTRAL INC I	A	Dividend	J	T	Buy	08/23/17	J		
74. - AQR MANAGED FUTURES STRATEGY		None			Sold	08/04/17	K		
75. - COLUMBIA SEL LARGE CAP VAL Z	A	Dividend	J	T	Sold (part)	08/04/17	J		
76.					Sold (part)	08/18/17	J	B	
77. - COLUMBIA SELECT LG CAP GROWTH Z	B	Dividend	J	T	Sold (part)	08/04/17	J	B	
78.					Sold (part)	08/18/17	J	A	
79. - DIAMOND HILL LONG SHORT	A	Dividend	J	T					
80. - DREYFUS NEWTON INTL EQI	A	Dividend	K	T	Sold (part)	08/07/17	J	B	
81.					Buy (add'l)	08/23/17	J		
82. - HARBOR INTERNATIONAL INST	A	Dividend	J	T	Sold (part)	08/04/17	J	B	
83. - INVESCO DEVELOPING MARKETS	A	Dividend	K	T					
84. - INVESCO DIVERSIFIED DIVIDEND	A	Dividend	J	T	Sold (part)	08/18/17	J	A	
85. - INVESCO INTL GROWTH	A	Dividend	K	T					

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86. - INVESCO SMALL CAP VALUE	B	Dividend	J	T	Sold (part)	08/18/17	J	B	
87.					Buy (add'l)	12/13/17	J		
88. - JANUS HENDERSON ENTERPRISE	A	Dividend			Sold	08/18/17	J	A	
89. - JANUS HENDERSON RESEARCH	B	Dividend	J	T	Sold (part)	08/18/17	J		
90. - JANUS HENDERSON INTL OPP I	A	Dividend	K	T	Buy	08/09/17	K		
91.					Buy (add'l)	08/23/17	J		
92. - JP MORGAN DYNAMIC SM OP GR SEL	A	Dividend	J	T	Sold (part)	08/18/17	J	C	
93. - LOCORR MACRO STRATEGIES I	B	Dividend	K	T	Buy	08/09/17	K		
94.					Buy (add'l)	12/08/17	J		
95. - LORD ABBETT SHT DURATION INC F	A	Dividend	J	T	Buy	08/23/17	J		
96. - PIONEER MLTI AST ULT SHT INC Y	A	Dividend	J	T	Buy	08/23/17	J		
97. - PRUDENTIAL JENNISON GROWTH	A	Dividend	J	T	Sold (part)	08/04/17	J	A	
98.					Sold (part)	08/18/17	J	B	
99. - VICTORY GLB NATURAL FES		None	J	T					
100. - VICTORY RS VALUE	A	Dividend	J	T	Sold (part)	08/18/17	J	B	
101. BROKERAGE ACCOUNT #2 (H)									
102. BLACKROCK GLOBAL ALLOCATION A	A	Dividend	J	T	Buy	10/12/17	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
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103. BLACKROCK GLOBAL ALLOCATION C	A	Dividend	J	T	Buy	05/31/17	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	

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Oldshue, Jr., Jerry C.

Date of Report

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

Part VII, Line 4 - Morgan Stanley cash balance fell below reporting threshold.

Part VII, Line 44 - MLP SELECT 40 is now referred to as OPI STEELPATH MLP SELECT 40 Y on the statement. It is the same investment.

Part VII, Line 50 - Investment asset account 529 Plans do not report income to the account. The reports only show the market value in the account, thus the column B(1) is left blank and "None" is entered in column B(2). Any other lines reporting no income means no income was earned on that investment during the year.

Part VII, Line 52 and 61 - Per note above the 529 Plan statements only report market value of assets held. No buy or sell information is provided. These lines reflect two new assets in the account.

Part VII, Line 68 - Constellation stock was purchased in 2016, but less than \$1,000 was purchased thus no buy information was reported. Constellation stock market value rose above reporting threshold. No additional shares were purchased.

Part VII, Line 71 - Morgan Stanley cash balance increased above the reporting threshold.

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Oldshue, Jr., Jerry C.

Date of Report

05/15/2018

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/ Jerry C. Oldshue, Jr.

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