

FINANCIAL DISCLOSURE REPORT INITIAL FILING

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) Evans, Barbara S.	2. Court or Organization United States District Court - District of New Mexico	3. Date of Report 06/21/2019
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) United States Magistrate Judge (PT)	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☒ Initial ☐ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2017 to 05/22/2019
7. Chambers or Office Address United States District Court Joe Skeen Federal Building 500 North Richardson Avenue Roswell, NM 88201		
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.	Trustee	Trust #1
2.	Trustee	Trust #2
3.	Trustee	Trust #3
4.	Trustee	Trust #4
5.	Trustee	Trust #5
6.	Board Member, Executive Committee member	Holsum, Inc.
7.	Board Member	SWS Family LLC
8.	Board Member	JKS Resources LLC
9.	Vice President	J. Kenneth and Alice Smith Family Foundation
10.	President, Board of Directors	Alianza of New Mexico
11.	Board Member (former)	Historical Foundation of Southeastern New Mexico

FINANCIAL DISCLOSURE REPORT

Page 2 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

II. AGREEMENTS. *(Reporting individual only; see pp. 14-16 of filing instructions.)*

☒ NONE *(No reportable agreements.)*

DATE

PARTIES AND TERMS

1. _____
2. _____
3. _____

FINANCIAL DISCLOSURE REPORT

Page 3 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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. 2019	Atwood Malone Turner and Sabin PA (salary)	\$11,980.00
2. 2018	Atwood Malone Turner and Sabin PA (salary)	\$40,902.70
3. 2017	Atwood Malone Turner and Sabin PA (salary)	\$55,759.32
4. 2016	Atwood Malone Turner and Sabin PA (salary)	\$55,759.32
5. 2019	Holsom, Inc. (Director's Fee)	\$2,500.00
6. 2018	Holsom, Inc. (Director's Fee)	\$7,000.00
7. 2017	Holsom, Inc. (Director's Fee)	\$8,000.00
8. 2016	Holsom, Inc. (Director's Fee)	\$7,500.00

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. 2019	Atwood Malone Turner and Sabin PA (salary)
2. 2018	Atwood Malone Turner and Sabin PA (salary)
3. 2017	Atwood Malone Turner and Sabin PA (salary)
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. Exempt				
2.				
3.				

FINANCIAL DISCLOSURE REPORT

Page 4 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

4. _____

5. _____

FINANCIAL DISCLOSURE REPORT

Page 5 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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.	Exempt		
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.			

FINANCIAL DISCLOSURE REPORT

Page 6 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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. PIONEER BANK (CASH)	A	Interest	J	T	Exempt				
2. NY LIFE INSURANCE (WHOLE)	A	Interest	K	T					
3. HOLSUM, INC	G	Distribution	P1	T					
4. SWS FAMILY LLC	A	Royalty	P1	W					
5. JKS RESOURCES LLC	E	Distribution	L	W					
6. IRA #1 (H)									
7. SPDR S&P 500 ETF (SPY)	A	Dividend	J	T					
8. VANGUARD TOT STOCK MKT INDX ADM (VTSAX)	A	Dividend	J	T					
9. IRA #2 (H)									
10. INVESCO (QQQ TRUST (QQQ)	A	Dividend	J	T					
11. ISHARES MSCI EAFE ETF (EFA)	A	Dividend	J	T					
12. SPDR S&P 500 ETF (SPY)	A	Dividend	J	T					
13. ZEO STRATEGIC INCM FD 1 (ZEOIX)	A	Dividend	J	T					
14. THORNBURG BETTER WORLD 1 (TBWIX)	B	Dividend	K	T					
15. TRUST ACCT #1 (H)									
16. SCHWAB ONE CASH ACCOUNT (CASH)	A	Interest	J	T					
17. FASTENAL CO (FAST)	A	Dividend							

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

Page 7 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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18. ARK WEB X.0 ETF (ARKW)	A	Dividend	J	T					
19. ISHARES GOLD ETF (IAU)		None	J	T					
20. ISHARES S&P 100 ETF (OEF)	A	Dividend	K	T					
21. SEGALL BRYANT & HAMILL PLUS BD FD RETAIL (WTIBX)	A	Dividend							
22. PIMCO SHORT TRM INSTL (PTSHX)	A	Dividend	J	T					
23. THORNBURG STRATEGIC INC FD I (TSIIX)	A	Dividend	K	T					
24. VANGUARD SHRT TRM BD INDX FD ADM (VBIRX)	A	Dividend							
25. COHEN & STEERS REALTY SHS (CSRSX)	A	Dividend	J	T					
26. LEUTHOLD CORE INVEST FD RETAIL (LCORX)		None							
27. MATTHEWS ASIAN GRWTH & INC FD INV (MACSX)	B	Dividend	K	T					
28. OAKMARK EQ & INC FD INV (OAKBX)	C	Dividend	K	T					
29. POPLAR FOREST PARTNERS INST (IPFPX)	B	Dividend	J	T					
30. THORNBURG BETTER WORLD INTL I (TBWIX)	C	Dividend	K	T					
31. TWEEDY BROWNE GLOBAL VAL FD (TBGVX)	B	Dividend	K	T					
32. VANGUARD TOT INTL STK INDX ADM (VTIAX)	A	Dividend	J	T					
33. VANGUARD TOT STOCK MKT INDX FD ADM (VTSAX)	A	Dividend	K	T					
34. TRUST ACCT #2 (H)									

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FINANCIAL DISCLOSURE REPORT

Page 8 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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35. SCHWAB ONE CASH ACCOUNT (CASH)	A	Dividend	J	T					
36. ARK WEB X.0 ETF (ARKW)	A	Dividend	J	T					
37. TEMPLETON GLOBAL BD FD A (TPINX)	A	Dividend	J	T					
38. THORNBURG STRATEGIC INCOME FD I (TSHIX)	A	Dividend	J	T					
39. ZEO SHORT DURATION INC FD I (ZEOIX)	A	Dividend	J	T					
40. AMG YACHTMAN FD I (YACKX)	C	Dividend	K	T					
41. BUFFALO DISCOVERY FD (BUFTX)	A	Dividend	K	T					
42. COHEN & STEERS REALTY SHS (CSRSX)	B	Dividend	K	T					
43. LEUTHOLD CORE INV FD RET (LCORX)		None							
44. OAKMARK EQ & INC FD INV (OAKBX)	B	Dividend	K	T					
45. OPPENHEIMER DEV MKTS FD CL A (ODMAX)	A	Dividend	J	T					
46. PAYDEN EQ INC FD INV (PYVIZ)	B	Dividend	K	T					
47. POPLAR FOREST PARTNRS INST (IPFPX)	C	Dividend	K	T					
48. THORNBURG BETTER WORLD INTL I (TBWIX)	A	Dividend	J	T					
49. TWEEDY BROWNE GLBL VAL FD (TBGVX)	A	Dividend	J	T					
50. VANG TOT INTL STK INDX ADM (VTIAX)	A	Dividend	K	T					
51. VANG 500 INDX FD INV SHS (VFINX)	A	Dividend	K	T					

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FINANCIAL DISCLOSURE REPORT

Page 9 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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52. TRUST ACCT #3 (H)									
53. SCHWAB ONE CASH ACCT (CASH)	A	Interest	J	T					
54. BERKSHIRE HATHAWAY (BRKB)		None	K	T					
55. ARK WEB X.0 ETF (ARKW)	A	Dividend	J	T					
56. STATOIL ASA ADR (STO)	A	Dividend							
57. ISHARES MSCI EAFE ETF (EFA)	A	Dividend							
58. VANGUARD TOTAL STOCK MKT ETF (VTI)	A	Dividend	K	T					
59. VANGUARD TOTAL WORLD STOCK ETF (VT)	A	Dividend	K	T					
60. LEUTHOLD CORE INV FD RET (LCORX)		None							
61. TEMPLETON GLOBAL BOND FD A (TPICZ)	A	Dividend							
62. THORNBURG STRATEGIC INC FD I (TSIIX)	A	Dividend	J	T					
63. ZEO STRATEGIC INCM FD I (ZEOIX)	A	Dividend	J	T					
64. MATTHEWS ASIAN GROWTH & INC FD I (MACSX)	A	Dividend							
65. OAKMARK EQUITY & INCOME FD I (OAKBX)	C	Dividend	K	T					
66. OPPENHEIMER DEV MKTS FD A (ODMAX)	A	Dividend	J	T					
67. PAYDEN EQUITY INCOME FD I (PYVIZ)	B	Dividend	K	T					
68. POPLAR FOREST PARTNERS I (IPFPX)	B	Dividend	J	T					

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FINANCIAL DISCLOSURE REPORT

Page 10 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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69. THORNBURG BETTER WORLD 1 (TBWIX)	B	Dividend	K	T					
70. TWEEDY BROWNE GLOBAL VAL FD (TBGVX)	A	Dividend	J	T					
71. VANGUARD 500 INDEX FD 1 (VFINX)	A	Dividend	K	T					
72. TRUST ACCT #4 (H)									
73. SCHWAB ONE CASH ACCT (CASH)	A	Interest	J	T					
74. ARK WEB X.0 ETF (ARKW)	A	Dividend	J	T					
75. TEMPLETON GLOBAL BOND FUND CL A (TPINX)	B	Dividend	J	T					
76. ZEO STRATEGIC INCM FD 1 (ZEOIX)	A	Dividend	J	T					
77. COHEN & STEERS REALTY SHS (CSRSX)	B	Dividend	J	T					
78. LEUTHOLD CORE INVESTMENT FD RET (LCORX)		None							
79. OAKMARK EQUITY & INCOME FD INV (OAKBX)	B	Dividend	J	T					
80. OPPENHEIMER DEVELOPING MKTS FD CL A (ODMAX)	A	Dividend	J	T					
81. PAYDEN EQUITY INCOME FD 1 (PYVIZ)	B	Dividend	K	T					
82. POPLAR FOREST PARTNERS CL INST (IPFPX)	B	Dividend	K	T					
83. VANGUARD EXTENDED MARKET INDEX FD INV SHRS (VEXMX)	A	Dividend	K	T					
84. VANGUARD TOTAL INTL STK INDEX ADM (VTIAX)	A	Dividend	K	T					
85. VANGUARD 500 INDEX FD INDEX FD INV SHS (VFINX)	B	Dividend	L	T					

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FINANCIAL DISCLOSURE REPORT

Page 11 of 17

Name of Person Reporting

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86. TRUST ACCT #5 (H)									
87. SCHWAB ONE CASH ACCOUNT (CASH)	A	Interest	J	T					
88. BERKSHIRE HATHAWAY (BRKB)		None	K	T					
89. ENERGY SELECT SECTOR SPDR (XLE)	A	Dividend	J	T					
90. SEGALL BRYANT & HAMILL PLUS BD RET (WTIBX)	A	Dividend							
91. ISHARES MSCI PACIFIC EX JAP (EPP)	A	Dividend	J	T					
92. PIMCO SHORT TERM INSTL (PTSHX)	A	Dividend	J	T					
93. COHEN & STEERS REALTY SHS (CSRSX)	B	Dividend	J	T					
94. LEUTHOLD CORE INVESTMENT (LCORX)		None							
95. THORNBURG BETTER WORLD INTL I (TBWIX)	C	Dividend	K	T					
96. POPLAR FOREST PARTNERS CL INST (IPFPX)	A	Dividend							
97. VANGUARD EXTENDED MARKET INDEX FD INV SHRS (VEXMX)	A	Dividend	J	T					
98. VANGUARD TOTAL STOCK MKT IDX FD ADM (VTSAX)	B	Dividend	K	T					
99. ISHARES GOLD ETF (IAU)		None							
100. VANGUARD TOTAL BOND MKT (BND)	A	Dividend							
101. BROKERAGE ACCT #1 (H)									
102. CHARLES SCHWAB BANK SWEEP (CASH)	A	Interest	M	T					

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FINANCIAL DISCLOSURE REPORT

Page 12 of 17

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103. SCHWAB VALUE ADVANTAGE (SWVXX) (CASH)	B	Int./Div.	L	T					
104. BROKERAGE ACCT #2 (H)									
105. SCHWAB ONE CASH ACCT (CASH)	A	Interest	K	T					
106. HOME DEPOT INC 2.25%18 (437076BB7)	A	Dividend							
107. HCA INC. (404119BM0)	B	Dividend							
108. PPG INDUSTRIES, I 2.3%19 (693506BH9)		None	K	T					
109. MYLAN NV 3.75%20F (62854AAL8)	A	Dividend	K	T					
110. KRAFT HEINZ FOODS 3.5%22 (50077LAJ5)		None	K	T					
111. ST JUDE MEDICAL 3.25%23 (790849AJ2)		None							
112. NM ST SEVERANCE 2.25% 19 TAX SPL (647310Y54)	A	Dividend							
113. BERNALILLO CNTY N 4.2%22 GO UTX (085275YM1)	B	Dividend							
114. RIO RANCHO NM PSD 4%19 GO UTX (767171JL6)	A	Dividend							
115. CLOVIS NM GRT 3%19 (189387CG6)	B	Dividend							
116. NM ST SEVERANCE 2.25%19 TAX SPL (647310Y96)	A	Dividend	K	T					
117. NM ST SEVERANCE TAX 4%20 (647310L58)	B	Dividend	K	T					
118. BELEN NM CNS SD #2 3%20 GO UTX (077581NZ5)	B	Dividend	K	T					
119. LAS CRUCES NM SD #2 5%25 (517534RA3)	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 = \$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

Page 13 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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)
120. HOBBS NEW MEX 5%50 (43385PAG4)	B	Dividend	K	T					
121. ABBOTT LABORATORIES (ABT)	A	Dividend	K	T					
122. ALLIANCE DATA SYSTEM (ADS)	A	Dividend	K	T					
123. ASTRAZENECA PLC (AZN)	B	Dividend	K	T					
124. BCE INC (BCE)	B	Dividend							
125. CHINA MOBILE LTD (CHL)	B	Dividend							
126. EQUINOR (EQNR)	C	Dividend	K	T					
127. FIAT CHRYSLER AUTO (FCAU)		None	J	T					
128. FORD MOTOR COMPANY (F)	A	Dividend							
129. HOME DEPOT (HD)	B	Dividend	K	T					
130. KONINKLIJKE PHILIPS (PHG)	A	Dividend	K	T					
131. KANSAS CITY SOUTHERN (KSU)	A	Dividend							
132. PAYPAL HOLDINGS (PYPL)		None	L	T					
133. SANOFI SPOND (SNY)	A	Dividend							
134. SHIRE PLC (SHPG)		None							
135. SALESFORCE.COM (CRM)		None	K	T					
136. TENCENT HOLDINGS (TCEHY)	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
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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	

FINANCIAL DISCLOSURE REPORT

Page 14 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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. TEXAS CAPITAL BANCSHARES (TCBI)		None	J	T					
138. TOTAL S A (TOT)	B	Dividend	J	T					
139. UNITEDHEALTH GRP (UNH)	A	Dividend	K	T					
140. VOLKSWAGEN A G (VWAGY)	A	Dividend	K	T					
141. WELLS FARGO BK N A (WFC)	A	Dividend							
142. ISHARES CORE S&P 500 (IVV)	C	Dividend	L	T					
143. VANGUARD EXTENDED MARKET (VXF)	A	Dividend	K	T					
144. VANGUARD TOTAL STOCK (VTI)	B	Dividend	L	T					
145. ZEO STRATEGIC INCM FD I (ZEOIX)	B	Dividend	K	T					
146. AMG YACKTMAN FD I (YACKX)	D	Dividend	L	T					
147. BUFFALO DISCOVERY FUND (BUFTX)	C	Dividend	K	T					
148. LEUTHOLD CORE INVESTMENT FD RET (LCORX)		None							
149. MATTHEWS ASIAN GROWTH & INC FD I (MACSX)	B	Dividend	K	T					
150. OAKMARK EQUITY & INCOME FD I (OAKBX)	C	Dividend	K	T					
151. PARNASSUS ENDEAVOR FD I (PFPWX)	D	Dividend	K	T					
152. PAYDEN EQUITY INCOME FD I (PYVIZ)	B	Dividend	K	T					
153. POPLAR FOREST PARTNERS I (IPFPX)	B	Dividend							

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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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 15 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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. THORNBURG BETTER WORLD I (TBWIX)	C	Dividend	K	T					
155. THORNBURG INVT INCOME BLDR FD CL I (TIBIX)	B	Dividend	K	T					
156. TWEEDY BROWNE GLOBAL VAL FD (TBGVX)	B	Dividend	K	T					
157. VANGUARD DIV GROWTH FD INV SHS (VDIGX)	D	Dividend	L	T					
158. VANGUARD EURO STK INDEX FD ADM (VEUSX)		None							
159. VANGUARD TOTAL INTL STK IDX ADM (VTIAX)	B	Dividend	K	T					
160. ISHARES CORE HIGH DIV ETF (HDV)	C	Dividend							
161. MAGELLAN MIDSTREAM P LP (MMP)	B	Dividend							
162. VANGUARD TOTAL INTERNTL (VXUS)	A	Dividend							
163. WEYERHAEUSER CO (WY)	B	Dividend	K	T					
164. 401K ACCT #1 (H)									
165. AMERICAN FUNDS 2040 TARGET DATE FUND R4 (RDGTX)	D	Dividend	M	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	
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FINANCIAL DISCLOSURE REPORT

Page 16 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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

Part I, line 6: The primary purpose of this business is agricultural. My role involves monitoring the acquisition of new farming properties, reviewing milk production, and some personnel issues.

Part VII, line 4: Valuation of this item is based upon the estimated value of real estate. A more precise valuation is not available.

Part VII, line 5: Valuation of this item is based upon the estimated value of gas and oil investments. A more precise valuation is not available..

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value, per page 42 of the filing instructions.

FINANCIAL DISCLOSURE REPORT

Page 17 of 17

Name of Person Reporting

Evans, Barbara S.

Date of Report

06/21/2019

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/ **Barbara S. Evans**

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