

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) McGarity, Margaret D.	2. Court or Organization US Bankruptcy Court	3. Date of Report 05/15/2015
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) US Bankruptcy Judge	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 517 E. Wisconsin Ave. Suite #162 Milwaukee, WI 53202		
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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (yours, not spouse's)
1. 2014	Book royalties - State Bar of Wisconsin	\$126.43
2. 2014	Book royalties - Matthew Bender & Co., Inc.	\$925.94
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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>
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.)*

<u>SOURCE</u>	<u>DATES</u>	<u>LOCATION</u>	<u>PURPOSE</u>	<u>ITEMS PAID OR PROVIDED</u>
1. National Association of Bankruptcy Trustees (NABT) 2014 Spring Seminar	April 3-5, 2014	Coral Gables, FL	speaker	transportation, food, & lodging
2. National Workshop for Bankruptcy Judges, FJC	August 12-15, 2014	Boston, MA	speaker	transportation, food, & lodging
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.	Bank of America - Mastercard	credit card	J
2.	Chase Manhattan Bank - VISA	credit card	J
3.	Sears Mastercard	credit card	J
4.	Discover Card	credit card	J
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. BMO Harris Bank (fka M&I Bank), Milwaukee, WI cash accounts	A	Interest	J	T					
2. Rent from [REDACTED] apt [REDACTED] [REDACTED], Milwaukee, WI	D	Rent							
3. This row is blank.									
4. IRA Trust #001 UBS ---									
5. --UBS Bank USA Deposit Account	A	Interest	J	T					
6. --Central Fund of Canada - CEF	A	Dividend	M	T					
7. --Central Fund of Canada - CEF					Buy (add'l)	02/04/14	J		
8. --Central Fund of Canada - CEF					Sold (part)	09/02/14	J	B	
9. This row is blank.									
10. IRA Trust #003 - UBS---									
11. --UBS Bank USA Deposit Account	A	Interest	J	T					
12. --UBS Pace Money Mkt, Investment Fund Class P, symbol PCEXX	A	Interest	J	T					
13. --Blackrock U.S. Opportunites A, symbol BMEAX	A	Dividend			Merged (with line 14)	08/25/14	J		
14. --Blackrock U.S. Opportunites Institutional Class, symbol BMCIX	A	Dividend	J	T	Open	08/25/14	J		
15. --Blackrock Equity Dividend Fund CI A, symbol MDDVX	A	Dividend			Merged (with line 16)	08/25/14	K		
16. --Black Rock Equity Dividend Fund Institutional, symbol MADVX	A	Dividend	K	T	Open	08/25/14	K		
17. --Thornburg Intl Growth Fund, class A, symbol TIGAX	A	Dividend			Merged (with line 18)	08/25/14	K		

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	

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☐ 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 I (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)

18. --Thornburg Intl Growth Fund, class I, symbol TINGX	A	Dividend	K	T	Open	08/25/14	K		
19. --Pace Global Real Estate Securities, invstm fund A, symbol PREAX	A	Dividend			Merged (with line 20)	12/10/14	J		
20. --Pace Global Real Estate Securities, invstm class P, symbol PREQX	A	Dividend	J	T	Open	12/10/14	J		
21. --Invesco Van Kampen Small Cap Value Fund Cls A, symbol VSCAX	A	Dividend			Merged (with line 22)	08/25/14	J		
22. --Invesco Small Cap Value Fund Class Y, symbol VSMIX	A	Dividend	J	T	Open	08/25/14	J		
23. --Virtus Small-Cap Sustainable Growth Fund, Class A, symbol PSGAX	A	Dividend			Merged (with line 24)	08/25/14	J		
24. --Virtus Small Cap Sustainable Growth Fund, Class I, symbol PXSGX	A	Dividend	J	T	Open	08/25/14	J		
25. --Loomis Sayles Investment Grade bond Fund, Class A, symbol LIGRX	A	Dividend			Merged (with line 26)	08/25/14	J		
26. --Loomis Sales Investment Grade bond fund, Class Y, symbol LSIIX	A	Dividend	K	T	Open	08/25/14	J		
27. --Wells Fargo Advantage Growth Class A, symbol SGRAX	A	Dividend			Merged (with line 28)	08/25/14	K		
28. --Wells Fargo Growth-I, symbol SGRNX	A	Dividend	K	T	Open	08/25/14	K		
29. --Blackrock High Yield Bond A, symbol BHYAX	A	Dividend			Merged (with line 30)	08/25/14	K		
30. --Blackrock High Yield Bond I, symbol BHYIX	A	Dividend	K	T	Open	08/25/14	K		
31. --Arbitrage Fund No Load Class, symbol ARBFX	A	Dividend			Merged (with line 32)	08/25/14	K		
32. --Arbitrage Fund Institutional Class, symbol ARBNX	A	Dividend	K	T	Open	08/25/14	K		
33. This row is blank.									
34. Investment Account UBS---									

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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	(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)

35. --UBS Bank USA Deposit Account	A	Interest	J	T					
36. --Powershares High Yield Equity Dividend - symbol PEY	A	Dividend	J	T					
37. --Invesco Value Municipal Income Trust, symbol IIM	A	Dividend	J	T					
38. --Nuveen Wis Muni Bond - symbol FWIAX	A	Dividend	K	T					
39. --Delaware Tax Free USA - symbol DMTFX	A	Dividend	J	T					
40. --Invesco quality Municipal Income Trust, symbol IQI	A	Dividend	J	T					
41. --Invesco Van Kampen Muni Income Fund, CI A, symbol VKMMX	A	Dividend	J	T					
42. --Blackrock Energy & RES TR symbol BGR	A	Dividend	J	T					
43. --Neuberger Berman Muni Fund - symbol NBH	A	Dividend	J	T					
44. --Calamos Strategic Total Return Fund - symbol CSQ	A	Dividend	K	T					
45. This row is blank.									
46. Vanguard Wellington Fund Admiral, symbol VWENX (fka VWELX)	B	Int./Div.	L	T					
47. Vanguard Windsor Fund Admiral, symbol VWNEX	A	Int./Div.	K	T					
48. This row is blank.									
49. Investment Account #2 - UBS---									
50. --UBS Bank USA Deposit Account	A	Interest	J	T					
51. --Central Fund of Canada - CEF	A	Dividend			Sold	09/02/14	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
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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Note regarding Part VII - Investments and Trusts:

There is no IRA Trust #002. That account was closed in 2008 and the proceeds transferred (i.e., rolled into) IRA Trust #001.

Line #2, Rent from apartment: no valuation for the apartment is stated because this rental unit is contained within [REDACTED] residence and is not a separate building.

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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/ Margaret D. McGarity**

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
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