

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2012

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) Morgan, Donna S.	2. Court or Organization U. S. District Court, Eastern District of Louisiana	3. Date of Report 10/09/2013
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U. S. District Judge - Active Status	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2012 to 12/31/2012
7. Chambers or Office Address 500 Poydras St., Room C322 New Orleans, LA 70130		
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. Partner (resigned March 30, 2012)	Phelps Dunbar, LLP
2. Director (resigned March 30, 2012)	New Orleans Association for Women Attorneys
3. Board of Trustees (resigned March 30, 2012)	Louisiana State University Paul M. Hebert Law Center
4. Fellow and State Co-Chair (resigned March 30, 2012)	American Bar Foundation
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. 1997	Wiener Weiss and Madison PC SIMPLE IRA Retirement Plan with former employer
2. 2006	Phelps Dunbar, LLP 401K Plan
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. 2012	Phelps Dunbar, LLP - salary	\$62,096.00
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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>
1. 2012	McGlinchey Stafford - salary
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.				
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.)*SOURCEDESCRIPTIONVALUE

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.)*CREDITORDESCRIPTIONVALUE CODE

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. Neighbors Federal Credit Union (see part VIII)	A	Interest	L	T					
2. Iberia Bank checking accounts	A	Interest	L	T					
3. Fidelity Contrafund	A	Dividend			Sold	05/17/12	M		
4. Franklin Small-Mid Cap Growth A	A	Dividend			Sold	05/17/12	J		
5. Eaton Vance Large-Cap Value A	A	Dividend			Sold	5/18/12	L		
6. Franklin Growth Fund A	A	Dividend			Sold	5/17/12	L		
7. Franklin Growth A	A	Dividend			Sold	5/17/12	L		
8. American Funds EuroPacific Gr R6	A	Dividend			Sold	5/17/12	K		
9. T. Rowe Price Equity Income	A	Dividend			Sold	5/17/12	K		
10. Franklin Equity Income A	B	Dividend			Sold	05/17/12	L		
11. Artisan Mid Cap Inv	A	Dividend			Sold	5/18/12	K		
12. Schwab Small Cap Index	A	Dividend			Sold	5/18/12	K		
13. Janus Overseas T	A	Dividend			Sold	5/18/12	K		
14. Harbor International Inv	A	Dividend			Sold	5/18/12	K		
15. BlackRock Global Allocation Inst	A	Dividend			Sold	5/17/12	K		
16. JHancock3 Small Company J	A	Dividend			Sold	5/17/12	K		
17. Invesco Mid Cap Core Equity	A	Dividend			Sold	5/17/12	K		

1. Income Gain Codes:	A = \$1,000 or less (See Columns B1 and D4)	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	F = \$50,001 - \$100,000 (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
3. Value Method Codes	P3 = \$25,000,001 - \$50,000,000 (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	P4 = More than \$50,000,000 S = Assessment W = Estimated	T = Cash Market

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18. American Funds New Perspective A	A	Dividend			Sold	5/17/12	J		
19. Wells Fargo Advantage Spec SmCp Val A	A	Dividend			Sold	5/17/12	J		
20. Templeton Foreign A	A	Dividend			Sold	5/17/12	J		
21. Mutual Quest A	A	Dividend			Sold	5/17/12	J		
22. Franklin Balance Sheet Investment A	A	Dividend			Sold	5/17/12	J		
23. American Funds Washington Mutual C	A	Dividend			Sold	5/17/12	J		
24. American Funds Invmt Co of Amer A	A	Dividend			Sold	5/17/12	J		
25. Franklin Balance Sheet Investment A	A	Dividend			Sold	5/17/12	J		
26. Templeton Foreign A	A	Dividend			Sold	5/17/12	J		
27. Templeton Growth A	A	Dividend			Sold	5/17/12	J		
28. Franklin Flex Cap Growth A	A	Dividend			Sold	5/17/12	J		
29. Mutual Quest A	B	Dividend			Sold	5/17/12	J		
30. Franklin Small-Mid Cap Growth A	A	Dividend			Sold	5/17/12	J		
31. Wells Fargo Advantage Spec SmCp Val A	A	Dividend			Sold	5/17/12	J		
32. Templeton Growth A	A	Dividend			Sold	5/17/12	J		
33. Fidelity Advisor New Insights C	A	Dividend			Sold	5/17/12	J		
34. Oppenheimer Developing Markets Y	A	Dividend			Sold	5/17/12	K		

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35. Franklin Flex Cap Growth A	A	Dividend			Sold	5/17/12	J		
36. Raymond James Sweep Account	A	Interest	K	T	Buy	5/17/12	K		
37. Raymond James Sweep Account	A	Interest	K	T	Buy	05/17/12	K		
38. Schwab Value Advantage Money	A	Interest	N	T	Buy	5/17/12	N		
39. Fidelity Retirement Mmkt	A	Interest	N	T	Buy	5/17/12	N		
40. Franklin Money Fund	A	Interest	M	T	Buy	5/17/12	M		
41. Franklin Money Fund	A	Interest	M	T	Buy	5/17/12	M		
42. Midland Life Universal Life Policies	A	Interest	K	T					
43.									
44.									
45.									

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

Section VII, Line 1 - Neighbors Federal Credit Union formerly known as Keypoint Federal Credit Union Account

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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/ Donna S. Morgan**

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