

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) Burris, Helen E.	2. Court or Organization US Bankruptcy Court, DSC	3. Date of Report 05/01/2015
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) US Bankruptcy Judge- Full time	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 Federal Courthouse 201 Magnolia Street Spartanburg, SC 29306		
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. Co-trustee Trust #1, #2, #3	See Part VII
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. 08/29/14	distribution from IRA disclosed in part VII lines 11 - 13 and reported on tax return	\$25,042.00
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.)*

DATE	SOURCE AND TYPE
1. 2014	Employment with Turner Padgett Graham & Laney
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. South Carolina Bar	01/24/2014 to 01/25/2014	Kiawah Island, SC	CLE/Bar meeting	registration waived
2. American Bankruptcy Institute	03/01/2014 to 03/04/2014	New York, NY	Moot Court Judge	travel, lodging, food and expenses
3. South Carolina Bankruptcy Law Association	05/02/2014 to 05/04/2014	Asheville, NC	CLE/annual meeting	lodging and food, registration waived
4. National Conference of Bankruptcy Judges	10/07/2014 to 10/11/2014	Chicago, IL	CLE/ annual meeting	lodging, travel
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.	Turner Padgett Graham & Laney 401K plan (loan from Fidelity Freedom 2030 Fund listed on VII)	loan from employer investment account to filer spouse	J
2.	American Express card	██████ business card	J
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. South State Bank (formerly SCBT)- Accounts	A	Interest	K	T					
2. Tr. #1 South State Bank (formerly SCBT)	A	Interest	J	T					
3. Tr. #2 Russell Frank Inv. Co. Lifepoints Fund Conserv.	A	Int./Div.	J	T	Sold (part)	05/19/14	K		cashed out in part
4. Russell Frank Inv. Co. Lifepoints Fund Growth Strategy Relax	C	Int./Div.	M	T	Distributed (part)	12/29/14	J		reinvested in 21
5. ING USA Annuity and Life Insurance Co.		None	M	T					
6. NW Mutual Whole Life Cash Value #1	D	Dividend	L	T					
7. #2 Putnam Investments New Opportunities Fund Class A & B	A	Dividend	J	T	Sold (part)	08/28/14	J		
8. 401K Fidelity Freedom 2030 Fund	E	Int./Div.	M	T					
9. NetReit Real Estate Investment Trust	B	Dividend	K	T					
10. IRA American Funds									
11. -American Funds-The Investment Company of America A	A	Dividend			Distributed	08/29/14	J		closed 2014
12. -American Funds-Income Fund of America A	A	Dividend	J	T	Distributed (part)	08/29/14	J		partial distrib 2014
13. -American Funds-EuroPacivic Growth Fund A	A	Dividend			Distributed	08/29/14	J		closed 2014
14. -American Funds-American Balanced Fund A	A	Dividend	J	T					
15. Future Scholar 529 College Savings Plan-FS Mod Conserv (no control)	A	Int./Div.	J	T	Distributed (part)	08/08/14	J		
16. -cont'd					Buy (add'l)	12/31/14	J		
17. Monogram Residential Trust (formerly Behringer Harvard Multifamily)	B	Dividend	K	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	
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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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 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. Rental Property #1 Greenville SC	D	Rent	K	W					
19. Trust #3 Invesco Bal Risk Alloc C	A	Int./Div.	J	T	Sold (part)	02/18/14	J		
20. Future Scholar 529 College Savings Plan (2nd acct) -FS Mod Conserv (2)	A	Int./Div.	J	T	Open	12/31/14	J		
21. Russell LifePoints Growth Strategy A (RALAX)		None	J	T	Open	12/29/14	J		from #4

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	

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

VII. #17- Behringer Harvard Multifamily REIT I, Inc., became self managed in July 2014 and is now known as Monogram Residential Trust.

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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/ **Helen E. Burris**

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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