

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) Schoelen, Mary J.	2. Court or Organization U.S. Court of Appeals for Veterans Claims	3. Date of Report 08/04/2018
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Judge - Active	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 625 Indiana Avenue N.W., Ste 900 Washington, D.C. 20004		
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.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 9

Name of Person Reporting

Schoelen, Mary J.

Date of Report

08/04/2018

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. 2017

Milken Institute - 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.)*

SOURCE

DATES

LOCATION

PURPOSE

ITEMS PAID OR PROVIDED

1.

2.

3.

4.

5.

FINANCIAL DISCLOSURE REPORT

Page 3 of 9

Name of Person Reporting

Schoelen, Mary J.

Date of Report

08/04/2018

V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*

☒ NONE *(No reportable gifts.)*

SOURCE	DESCRIPTION	VALUE
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.)*

CREDITOR	DESCRIPTION	VALUE CODE
1.		
2.		
3.		
4.		
5.		

FINANCIAL DISCLOSURE REPORT

Page 4 of 9

Name of Person Reporting

Schoelen, Mary J.

Date of Report

08/04/2018

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. USAA Income Stock Fund (Roth IRA)	A	Dividend	J	T					
2. Fidelity Spartan Intl Index Fund (403(b))	A	Dividend	J	T					
3. Fidelity 500 Index Fund Premium Class (IRA)		None	K	T					
4. Vanguard Institutional Index Fund (403(b))	C	Dividend	M	T					
5. Vanguard Developed Markets Index Fund (403(b))	B	Dividend	K	T					
6. Vanguard Institutional Index Fund (401(a))	C	Dividend	M	T					
7. Vanguard Developed Markets Index Fund (401(a))	B	Dividend	K	T					
8. TIAA Traditional Fund (403(b))	A	Interest	J	T					
9. CREF Equity Index Fund (403(b))		None	K	T					
10. TIAA/CREF International Equity Index (403(b))	A	Dividend	J	T					
11. TIAA/CREF S&P 500 Index (403(b))	A	Dividend	K	T					
12. TIAA Real Estate Fund (403(b))	A	Interest	J	T					
13. Mass Mutual S&P 500 Index Fd(Nrthrn Tr) (403(b))		None	K	T	Buy (add'l)	03/31/17	J		
14.									
15. FIDELITY BROKERAGE ACCT									
16. iShares EAFE Index exchange traded fund (EFA)	A	Dividend	K	T					
17. S&P 500 Depository Receipt exchange traded fund (SPY)	A	Dividend	L	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		

FINANCIAL DISCLOSURE REPORT

Page 5 of 9

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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 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)

18. Berkshire Hathaway Inc Class B Common Stock (BRKB)		None	K	T					
19. Fidelity Spartan 500 Index Mutual Fund (FUSVX)	B	Dividend	L	T					
20. Fidelity Total Bond Fund (FTBFX)	A	Dividend	J	T	Buy (add'l)	03/01/17	J		
21.									
22. VANGUARD MUTUAL FUND ACCT									
23. Total Stock Mkt Idx Adm (VTSAX)	C	Dividend	L	T	Buy (add'l)	01/10/17	J		
24.					Buy (add'l)	01/24/17	J		
25.					Buy (add'l)	02/07/17	J		
26.					Buy (add'l)	02/21/17	J		
27.					Buy (add'l)	03/07/17	J		
28.					Buy (add'l)	03/21/17	J		
29.					Buy (add'l)	04/04/17	J		
30.					Buy (add'l)	04/18/17	J		
31.					Buy (add'l)	05/02/17	J		
32.					Buy (add'l)	05/16/17	J		
33.					Buy (add'l)	05/30/17	J		
34.					Buy (add'l)	06/13/17	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

Page 6 of 9

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35.					Buy (add'l)	06/27/17	J		
36.					Buy (add'l)	07/11/17	J		
37. Total Bond Mkt Index Inv (VBMFX)	A	Dividend			Buy (add'l)	01/06/17	J		
38.					Buy (add'l)	02/07/17	J		
39.					Buy (add'l)	03/07/17	J		
40.					Buy (add'l)	04/07/17	J		
41.					Sold	04/20/17	J		
42. Total Bond Mkt Index Adm (VBTIX)	A	Dividend	K	T	Buy	04/20/17	J		
43.					Buy (add'l)	05/05/17	J		
44.					Buy (add'l)	06/07/17	J		
45.					Buy (add'l)	07/07/17	J		
46.									
47. MERRILL EDGE BROKERAGE ACCT									
48. T Rowe Price Extended (PEXMX)	A	Dividend	J	T					
49. T Rowe Price Total (POMIX)	A	Dividend	J	T					
50.									
51. BANK ACCOUNTS									

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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FINANCIAL DISCLOSURE REPORT

Page 7 of 9

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Schoelen, Mary J.

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52. Bank of America - Checking Acct. (X)		None	K	T					
53. Ally Bank - Savings Account	A	Interest	J	T					
54. Bank of America - Regular Savings Acct	A	Interest	J	T					
55. Bank of America - Money Market Savings Acct (Y)									
56. Bank of America - Platinum Money Market Savings Acct (Y)									
57.									
58. U.S. TREASURY-DIRECT ACCOUNTS									
59. Series I Savings Bonds ()	A	Interest	K	T					
60. Series I Savings Bonds ()	A	Interest	K	T					
61.									

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FINANCIAL DISCLOSURE REPORT

Page 8 of 9

Name of Person Reporting

Schoelen, Mary J.

Date of Report

08/04/2018

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

Part VII, line 37-45: The Vanguard bond fund VBMFX that was reported in 2016, was converted to VBTLX on 4/20/17. All assets were transferred from the old fund into the new fund.

Part VII, Line 52: This Bank of America checking account should have been reported previously. I misunderstood the instructions in previous years and thought that only savings accounts, and not checking accounts, needed to be reported.

Part VII, Line 55-56: These two savings accounts reported in 2016 had balances below the \$1000.00 reporting threshold on 12/31/17.

Part VII, lines 59-60: Both I and my spouse previously purchased U.S. Savings Bonds (Series I). As these bonds are keyed to an individual's Social Security Number, we have divided the bonds into [REDACTED] and [REDACTED].

FINANCIAL DISCLOSURE REPORT

Page 9 of 9

Name of Person Reporting

Schoelen, Mary J.

Date of Report

08/04/2018

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/ Mary J. Schoelen**

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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